EUROMED SURVEY OF EXPERTS AND ACTORS

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INTRODUCTION
ANDREU BASSOLS. Director General, IEMed.

The European Institute of the Mediterranean (IEMed) has been entrusted by the European Commission to conduct, for the period 2009-2012, a yearly survey of actors and experts on Euro-Mediterranean relations. This activity is part of the programme “Promoting mutual awareness, understanding and cooperation between the European Union (EU) and the European Neighbourhood Region (South)” (EuropeAid/125411/ACT/C/Multi-Lot3), co-funded by the European Union through the European Neighbourhood and Partnership Instrument (ENPI) regional track.

This project is fully in keeping with the IEMed’s mission as an actor of dialogue between the European Union and the Mediterranean countries and as a think tank for the analysis of Euro-Mediterranean relations proposing and disseminating political options, thereby contributing to the building of a real Euro-Mediterranean area. The development of this ambitious Survey has three objectives:

- The thorough assessment of the progress, achievements and shortcomings of each field of action of the Euro-Mediterranean Partnership, encompassing both the European Neighbourhood Policy and the Union for the Mediterranean.
- The development of an instrument for analysis and mobilisation of experts and policy-makers which can contribute to the design and redefinition of Euro-Mediterranean policies.
- The forward-looking identification of the main challenges and trends to identify proposals to confront them.

This second Survey has had the participation of a total of 598 experts, policy-makers and members from civil society from the 43 countries that make up the Union for the Mediterranean, 38% more than last year with a balanced representation of EU countries and Mediterranean Partner Countries.

This report presents the results of this project, bearing in mind that it is not a public opinion survey but an exercise in assessing and identifying the major successes and difficulties, as well as the potential and shortcomings of the Euro-Mediterranean Partnership (EMP) from the point of view of experts and actors involved. Thus, it is above all an effort to mobilise and generate opinion with respect to Euro-Mediterranean policies in order to reinvigorate the current debate and to launch policy action proposals.

The report is structured in two parts: a descriptive analysis of the results and a more detailed description of the different thematic blocks of the Survey. It is completed with ten qualitative articles which endeavour to analyse and interpret the results. For the preparation of this second qualitative section, we have had the collaboration of experts who have produced these analytical documents.

The Survey fieldwork took place between November and December 2010 and, for this reason, the data collected does not reflect the consequences of the profound changes, still underway, of the uprisings in the Arab world, which will transform Euro-Mediterranean relations. However, in order to integrate reflections on these events, we asked the authors who have contributed to this publication to take these uprisings into consideration along with the new challenges resulting from this process, which the region will have to face.
SENÉN FLORENSA. President of the Executive Committee, IEMed.

Last year, the Survey was marked by the important moment of implementing the Union for the Mediterranean. Fifteen years after the creation of the Barcelona Process, it meant the beginning of a new stage involving the launching of a new institutional framework and new instruments which were to reinvigorate the Euro-Mediterranean Partnership.

This second Survey, along with continuing to monitor the 2009 assessment, includes a section devoted to assessing the Euro-Mediterranean Free Trade Area (EMFTA) in the year planned for its implementation in the 1995 Barcelona Declaration.

For years we have been witnessing the long and complex process of establishing free trade agreements between the EU and the Mediterranean Partner Countries and we have also recognised the long path ahead for South-South regional integration. The global economic crisis has added to these difficulties, altering the classical coordinates of international trade.

In this field, we have made special efforts to bring together and assess the challenges, opportunities and difficulties of this liberalisation process which, along with the aforementioned current global crisis, has also been influenced by the consolidation of new world economic actors during the last decade.

It has been especially interesting to analyse the impact of the EMFTA on the economies of the Mediterranean Partner Countries in terms of growth and competitiveness, society, SMEs or the fiscal system, given that these can be important indicators of the success of trade liberalisation as well as reforms and changes involved in this process in the state economies.

It is worth noting that the data collected during the fieldwork in November and December 2010 cannot reflect the consequences of the profound changes, many still underway, of the uprisings in the Arab world which, of course, go beyond the analysis and interpretation of the Survey’s results.

In fact, the different processes of democratic transition we are witnessing are opening a fundamental dual reflection which should challenge all of us involved in this regional integration process. On the one hand, and closely linked to this exercise and its objectives, the impossibility of grasping the current dissatisfaction which, on the other, has enabled the success of the revolts. In other words, as indicated in this report, the results of the questions put to experts and policymakers which seek to detect the difficulties and problems affecting the region in the short and long term, asked before the revolutions, denote a resigned acceptance of the status quo, given that in no case do the answers suggest the possibility of a scenario of instability.

Secondly, in relation to Euro-Mediterranean dialogue itself, we seem to be facing a change of era in the Arab world; while Europe, which has seen how for years its soft power applied to the region has effectively guided its economic evolution but has not managed to introduce political change, must be more active and decisively support the processes of democratic transition underway.

A period has begun of rethinking the European strategy for the promotion of democracy, based until now on the encouragement of ordered and gradual policy reform through political dialogue and financial instruments. These uprisings show the unfeasibility of a political dialogue limited to the elites of the southern countries and the absolute need to accompany the economic modernisation with social cohesion mechanisms and processes of democratic transition.

Undoubtedly, a new opportunity has emerged for Euro-Mediterranean regional integration, so that the association agreements stimulate both the political and economic objectives. An opportunity to pick up and renew some of the main contributions of the Euro-Mediterranean Partnership that could never be satisfactorily developed: demand for democracy, respect for human rights and strengthening the role of civil society.
SECOND EUROMED SURVEY
I. Methodology

After the production of the first Euromed Survey, whose report was widely disseminated, we present the results corresponding to the year 2010, in which a total of 598 experts, policymakers and actors from civil society from the 43 partner countries of the Union for the Mediterranean (UfM) have participated. On this occasion, along with the main aspects of Euro-Mediterranean policy, special emphasis has been placed on the assessment of economic and financial aspects.

It is a survey aimed at experts and policy-makers from the countries that make up the Euro-Mediterranean space and who have been identified according to their knowledge of and/or involvement in the Euro-Mediterranean Process: academics, think tanks and the media, diplomats and representatives from central and local governments responsible for Euro-Mediterranean issues or cooperation in the region, political representatives, activists and members of NGO networks, trade unionists and businessmen, as well as officers from international organisations directly involved in the Euro-Mediterranean Partnership, such as the EU or the Arab League. The Survey has been carried out based on a questionnaire with a total of 31 general questions divided into three thematic blocks.

A first block is aimed at assessing the progress and regression of Euro-Mediterranean policies from 2008 onwards. Moreover, questions have been included to assess the prospects for 2010-2012.

The second block comprises questions about the thematic dossier of this second Survey; the focus is on the Euro-Mediterranean Free Trade Area in 2010 and beyond, as well as economic and financial cooperation.

Finally, the third block covers the specific cooperation sectors, with the objective of assessing the programmes related to services and agriculture, sustainable development, energy, water, and so on.

The questionnaire includes another 15 specific questions about the Euromed Free Trade Area, the economic and financial cooperation programmes and also sectoral cooperation, aimed specifically at all those participants with a good knowledge or clear perception of these issues in order to achieve a detailed and qualified analysis of the Euro-Mediterranean programmes and initiatives assessed.

In general, the questions are multiple-choice with predefined answers and many of them offer respondents the possibility to grade them from 0 to 10. Moreover, for some questions, an optional space is provided to explain the answer. This open part of the questions is considered of great importance for a survey of this kind as it contributes to improving the interpretation of its overall results.

The fieldwork was carried out between the months of November and December 2010. To facilitate the answers, respondents had an interactive electronic questionnaire at their disposal. It was also possible to download and complete the questionnaire in Word format.
II. Sample Survey

To conduct the Survey, a universe of 4,054 experts, policy-makers and institutional representatives was identified, of which a sample of 735 people was extracted, equivalent to 20% of the universe.

As in the previous Survey, geographical origin, institutional typology and area of knowledge, as well as the search for maximum gender representativeness, were the criteria for selecting the universe (see annex II, “Target and Effective Sample of the Survey”).

In order to maximise the validity of the sample to represent the target population, a basic criteria based on the population size of each country was adopted. The resulting target number of respondents by country was corrected to factor the direct involvement of the countries in the Euro-Mediterranean Partnership since the beginning of the process, in 1995 (see Table). Ideally, no country should have fewer than 3 respondents. Thus, the sample was structured so that 47% of answers would come from Mediterranean member countries, 50% from European Union countries, and 3% from international institutions.

Table 1. Criteria for the definition of the target sample

<table>
<thead>
<tr>
<th>Number of respondents by country's population</th>
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<tr>
<td>More than 30 million</td>
<td>15</td>
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<tr>
<td>From 10 to 30 million</td>
<td>10</td>
</tr>
<tr>
<td>From 4 to 10 million</td>
<td>5</td>
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<tr>
<td>Fewer than 4 million</td>
<td>3</td>
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<table>
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<tr>
<th>Correction factors of the number of respondents</th>
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</thead>
<tbody>
<tr>
<td>European countries non-members of 1995 EMP</td>
<td>-2</td>
</tr>
<tr>
<td>MPC members of 1995 EMP</td>
<td>10</td>
</tr>
</tbody>
</table>

Finally, 598 answers were received, which means 80% of the response rate (see Annex II, “Target and Effective Sample of the Survey”). In the distribution of answers from Mediterranean Partner Countries (hereafter, MPCs), which includes all the countries of the Euro-Mediterranean Partnership and the Union for the Mediterranean, and answers from the 27 EU members, the percentage is 49% for the former and 47.3% for the latter.

Graph 1. Answers according to geographical origin: EU-27 and Mediterranean Partner Countries (EMP+UfM)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
The response rate distribution among groups of countries maintains a relative homogeneity among Mediterranean EU countries whose percentage of total participation reaches 27%. The percentages for the other EU member countries and those of the Maghreb1 and Mashreq2 are around 20%. The others are distributed between Turkey, Israel and European non-EU countries.3 It is also important to note that, for the objectives established in the sample, the real number of answers has exceeded the objective, except in the case of non-Mediterranean EU countries, which shows the difficult mobilisation of central European and Atlantic European policy-makers with respect to issues in the Mediterranean area.

Graph 2. Target answers by region

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

At the start of the questionnaire, respondents were asked to define the kind of institution they belong to and also to indicate its affiliation (governmental, think tank, NGO, etc.). They were also asked about their main and, where applicable, secondary area of specialisation.

If answers obtained are analysed according to institutional typology of respondents (the three large groups within which we combine the 10 distinct institutional affiliations from which the respondent could choose), we see how a third corresponds to civil society, another third to policy-makers and the remaining 40% to experts. The graph shows the specific percentages of each of the groups cited.

Graph 3. Answers by kind of institution

1. Maghreb countries include Morocco, Algeria, Tunisia, Mauritania and Libya.
2. Mashreq countries include Egypt, Jordan, Lebanon, Palestine and Syria.
3. European non-EU countries in the Survey are Albania, Croatia, Bosnia and Herzegovina, Montenegro and Monaco.
However, taking into consideration the main groups out of the total of answers obtained, we see that the main group is formed by academics (around 30%) followed by NGOs (21.6%), and in third place government representatives (17%). The three groups account for almost 70% of answers obtained.

As previously indicated, respondents were asked for their area of specialisation, indicating both their main and, if appropriate, secondary area of specialisation.

Taking into consideration only the first area of specialisation indicated by respondents themselves, we see that most participants (37%) are found in the area of “social and cultural cooperation and human exchanges”. In second and third place are those who regard themselves as experts in “political cooperation and security” and in “economic and financial cooperation”, which both account for 30% of respondents. Finally, 2.2% of people are in the area of specialisation “migration and justice affairs”.

An aggregated analysis of areas of main and secondary specialisation cited by respondents indicates that most have knowledge of “social and cultural cooperation and human exchanges” and that this area has more specific weight in the MPCs than in EU countries. The same happens in the area of “economic and financial cooperation”, the most frequent second area of specialisation, where in the MPCs it has a relatively higher weight than in the case of EU participants.
Survey Follow-up

Graph 5. Area of specialisation by region (in %)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Respondents could indicate one or two areas of specialisation. These are totals for the first and second areas, therefore the total percentage exceeds 100.

To conclude the description of the sample obtained, it is important to note, that around one third of participants are women. For Mpcs, the percentage reduces to 25.0%, while for EU countries it rises to 35.0%. By regional group, the differential between the Maghreb (14.4% of female participation) and the Mashreq (29.5%) stands out, while answers tend towards greater parity in the case of European countries outside the EU.

III. Survey Follow-up

The first Survey forms part of a four-year programme which aims to carry out a survey every year based on the same main sample of policy-makers and experts, with the objective of covering the main issues on the political agenda of the region and monitoring the progress in Euro-Mediterranean perceptions and policies.

In the first and last year, the Survey is expected to have the same format of five main questions: 1) the progress of the Euro-Mediterranean Partnership and the European Neighbourhood Policy, 2) the involvement of policy-makers in the Euro-Mediterranean Partnership, 3) a thematic dossier, 4) Mediterranean trends (a prospective analysis of factors, strategic challenges and key risks), and 5) policy proposals. For the intermediate years, 2010 and 2011, a more reduced questionnaire was planned, mainly focused on the thematic dossiers.

The thematic dossiers on the different dimensions of the Euro-Mediterranean Partnership are structured in accordance with the following calendar. In 2009, the questions focused on the assessments and future prospects of the Union for the Mediterranean. For the Survey this year – 2010 – the thematic dossier approaches the economic and financial dimension (Euro-Mediterranean Free Trade Area including, among other themes, the liberalisation of services and agricultural products). The questionnaire pays special attention to economic and financial cooperation in terms of the Financial Prospects 2014-2020.

In the next Survey, the questions in the thematic dossier will monitor the political and security dimension: conflict prevention and crisis management, political dialogue, cooperation in the field of democratisation and fostering human rights. The final Survey, in 2012, will cover the social, human and cultural dimension and, in particular, migration flows and immigration policies, gender issues, employment, education and culture.
SYNTHESIS OF RESULTS

The general assessment of the Euro-Mediterranean Process does not achieve a result as positive as the potential perception held of the Euro-Mediterranean institutions. The opinion of respondents in these fields makes it clear that the construction and development of the institutional structure of the EMP/UfM still enjoys a margin of confidence among Euro-Mediterranean policy-makers and experts to be fully operative.

II. Almost Twelve Years Later: Assessment of the Establishment of the Free Trade Area

In the assessment of the creation of the Euro-Mediterranean Free Trade Area (EMFTA), we cannot talk of consensus among respondents. However, the answers suggest that there has been greater or lesser progress in its implementation depending on the country. A first block, with a slightly positive assessment, groups the countries that have most progressed in the implementation of the EMFTA (Tunisia, Morocco and Israel); the next group has a significantly less optimistic assessment (Jordan, Egypt and Lebanon) and, lastly, Palestine and Algeria, which are clearly below the average.

1. This Survey is being carried out during the creation of the UfM. Therefore, the assessment of the years since 1995 has opened serious debates regarding Euro-Mediterranean regional integration. Furthermore, when preparing the present questionnaire, in 2010, the new institutional framework and new instruments that were designed to have the capacity to relaunch the Euro-Mediterranean Partnership, such as the creation of the General Secretariat of the UfM, were still unclear. Therefore, the first question covers the assessment of both the EMP and the UfM.
Graph 2: Assessing progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Another outstanding element in the set of questions about the EMFTA is that respondents consider that its implementation has generally had a positive impact, especially in the growth and competitiveness of the partner countries above aspects such as employment on which it is considered to have had a minimum impact.

Graph 3: Assessment of the impact of EMFTA in the economies of the Mediterranean Partner Countries in terms of
(average on a scale of 0-10, where 0 stands for very negative, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

In reference to sectoral strategies, the Euro-Mediterranean action plans and the six UfM projects, there is a dual approach: one which is critical or very critical when assessing the progress of the implementation of the programmes and another approach that has a distinct positive tendency when assessing the suitability or relevance of the initiative itself or its relevance in the framework of the Euro-Mediterranean objectives.
III. Achievements and Progress of the Mediterranean Partnership 2008-2010

As previously mentioned, the general assessment of the Euro-Mediterranean process does not achieve a result as positive as the perception of the Euro-Mediterranean institutions. The most outstanding points are:

A slightly negative perception. The average assessment by respondents as a whole is 4.6. This is a similar assessment to that of the 2009 Survey, which was 4.7. The vicissitudes and delays in the implementation of the Secretariat of the UfM or the cancelation of the Euro-Mediterranean summits do not seem to have significantly influenced the perception of respondents but have produced a greater polarisation of opinions. The comparison with the 2009 results shows that, although they are similar on average, there has been an increase in the polarisation of opinions both for and against. Another worrying aspect is that the most negative assessments by region come from respondents in Mediterranean EU countries such as the Maghreb. In other words, the two areas that have probably shown most interest in the Partnership since its beginnings.

Secretariat of the UfM, between disappointment and hope. The assessment of the implementation of the Secretariat is also negative although, when asked about its future role, most respondents assess it positively, as they did in the 2009 Survey. The paralysis of the Secretariat is assessed as if it had not yet been implemented, but hopes in the institution remain stable.
Low visibility of sectoral plans and strategies. The Euro-Mediterranean strategies and action plans suffer from a major lack of visibility as a large majority of respondents are unaware of them. Those who do know about them consider them very important for the achievement of the EMP objectives. However, when assessing their real progress in recent times the level of knowledge is reduced even more and only two plans (the Istanbul Action Plan Strengthening the Role of Women and the Priority Action Plan on Energy) exceed 50% of respondents who consider that they have progressed. Meanwhile, at the other extreme, 80% of respondents consider that the Employment Framework of Actions (heavily penalised by economic circumstances) has either not progressed or regressed.

UfM projects: only the Solar Plan and the EMUNI have progressed. The importance of UfM projects is not disputed as all receive very high assessments. However, their individual progress is not perceived in the same way. Only two of the six projects, the Solar Plan and the Euro-Mediterranean University (EMUNI), are considered to have progressed by over 50% of respondents. The difficult constitution of the Secretariat has undoubtedly affected the implementation of the projects. However, the clearly defined projects have achieved a greater perception of their progress.

Future: UfM youth and training projects. When asked about which projects can be included among the UfM projects, respondents prioritise those linked to issues of youth, training and mobility (Mediterranean Erasmus Junior Programme and Mediterranean Youth Office).

Financial instruments. Most respondents agree on the need to revise the financial instruments of Euro-Mediterranean cooperation. Among the proposals put forward, respondents favour a new regional programme in the framework of the ENPI. However, when asked about the probability of the implementation of these new instruments or the increase of available funds, most respondents are pessimistic, especially those from the EU.

Future hypotheses. The future of the Mediterranean expressed in the form of medium- or long-term hypotheses makes it clear that for respondents those of a more negative component are more probable. Compared with the result of the 2009 Survey, we can say that:

- Water scarcity and the associated conflicts and tensions are still the main concern.
- The consequences of irregular immigration, whether in destination societies or in the migration management policy in the region are the most prominent new aspects in the medium and long term.
- The impact of the Arab-Israeli conflict on the MPCs is losing importance.

IV. Thematic Dossier: The Euro-Mediterranean Free Trade Area (EMFTA) in 2010 and Beyond, and the Economic and Financial Cooperation

Although the assessment of the implementation of the Euro-Mediterranean Free Trade Area (EMFTA) does not show a clear consensus among respondents, its impact is assessed rather positively. Thus, the main aspects to note in the thematic dossier are:

General economic context. In a context of crisis, the economic prospects for the Mediterranean are not very promising. Respondents consider it quite probable that the EU will focus on resolving the crisis, marginalising cooperation with its Mediterranean neighbours. This would be the scenario considered most probable from a range of six. The other two most probable are also not very encouraging (the reduction of resources for Euromed cooperation or that European social tensions will intensify, which will increase the reticence to cooperate). The scenarios with a positive effect in the long term for Euromed cooperation, although not dismissed, are considered less probable.
**Economic integration.** For respondents, Euro-Mediterranean integration represents high added value in the process of globalisation and trade liberalisation. Nevertheless, respondents note that other external economic actors, such as the USA, China or the Gulf countries, will gradually displace the preeminent role of the EU in the Mediterranean. This displacement is seen to be more likely to happen in the Mashreq countries than in those of the Maghreb.

**Free Trade Area.** The implementation of the EMFTA as a whole is graded by respondents with an average of 4.9; that is, neither disappointing nor very positive. The distribution of answers on the scale 0-10 shows almost a normal curve. However, when asked to assess the implementation of the EMFTA in each of the MPCs, except Syria which has still not signed the Association Agreement, the results do show significant differences. The results seem to indicate that the countries can be grouped in three blocks differentiated in function of progress in the implementation of the EMFTA. A first block formed by Tunisia, Morocco and Israel, in which it is considered that this implementation has progressed slightly more positively. A second block formed by Jordan, Egypt and Lebanon, in which progress is seen as significantly less optimistic, and a third block, Palestine and Algeria, where the assessment is maintained at grades clearly below the average. In short, except in the case of the last two countries, the assessment of the implementation by countries is better graded than that of the EMFTA as a whole.

**Impact of the EMFTA.** For respondents, the impact of the EMFTA has been greater on growth and competitiveness (6.1 on average) or on the SMEs (5.8) than on employment (5.6) or State revenues (5.3), although it should be noted that in all these cases it has been a positive impact. In the case of Turkey, the impact of the Customs Union on these areas follows the same pattern with significantly higher grades.

**South-South integration.** South-South integration, one of the necessary elements for an authentic Mediterranean Free Trade Area, does not achieve pass level in the assessment of implementation of the different initiatives in this respect. Nevertheless, the Agadir Agreement achieves the best assessment, above GAFTA and far above the AMU. On the other hand, respondents do consider the agreements between Turkey and some MPCs as an efficient mechanism for achieving the EMFTA, especially those of the MPCs.

**Agriculture and services.** The assessment of the progress in negotiations for liberalisation of trade in services and agricultural products does not encourage optimism, especially when it is precisely MPC respondents who make a lower assessment. Although respondents as a whole consider that agricultural liberalisation would have a positive impact both on the MPCs and the EU (to a lesser extent), the probabilities of a complete liberalisation are scarce according to respondents. In this context, the future depends on the Deep and Comprehensive Free Trade Areas planned to be established with the MPCs as they contribute an added value in the opinion of respondents from the north and south of the Mediterranean.

**Financial cooperation.** The assessment of the effectiveness of financial cooperation, both that of bilateral assistance in the framework of the ENPI and that of direct budget support, achieves a slightly positive level (a little more than the assistance granted through the ENPI). It is notable that Mashreq respondents most positively assess the two modes of cooperation, while the Maghrebians negatively assess the effectiveness of the ENPI, and non-Mediterranean Europeans negatively assess this means of budget support.
V. Sectoral Cooperation

The third block of the Survey focuses on assessing the specific sectoral plans in the framework of the EMP. In this case, the general questions have been completed with filter questions aimed at those respondents who say they have specific knowledge of each of the issues under analysis. In this respect, it should be noted that part of the results is based on the opinion of experts who account for around 30% of all respondents.

In general, there is a dual approach in the assessment of sectoral cooperation. The results are critical or very critical when assessing its progress. However, the tendency is more positive when assessing the suitability or relevance of the project itself or its relevance in the framework of the Euro-Mediterranean objectives.

Industrial cooperation. From the five priority axes in industrial cooperation of the working programme 2009-10, only in two cases do more than 50% of respondents consider that they have progressed: the improvement of the business climate and favouring industrial trade. For two other priorities, promotion of innovation and dialogue in the textile and clothing sector, a majority does not consider that there has been no progress. The fifth, sustainable industrial development, does not achieve a majority positive assessment of its progress, although there is a clear geographical differentiation: for MPCs it has progressed but for EU-27 respondents it has not. In terms of questions on specific programmes, both “Invest in Med” and the industrial modernisation programmes in Jordan, Egypt, Tunisia and Lebanon developing in the framework of MEDA achieve a slightly positive assessment. The most notable aspect of these assessments is the differences between respondents from the Maghreb (the most negative) and the Mashreq (the most positive).

The water sector, a priority in Euromed cooperation. As in the general assessment, cooperation in the water sector is considered a priority in the Euromed field. The same happens when assessing the priorities of the third ministerial conference as they all achieve averages above 7. The questions about more specific aspects maintain an optimistic assessment. Thus, the assessment of short-term progress for the eight objectives of the Mediterranean Water Strategy is between 5.5 and 6.8, even though the strategy itself has not yet been ratified. The MEDA WATER project also receives a pass grade (an average of 6) although with the now traditional (in this Survey) disparity of criteria between respondents from the Maghreb and the Mashreq.

Cooperation in the energy sector: important but unknown. In the question about energy cooperation, the high lack of knowledge among respondents stands out. Moreover, the question on progress in the implementation of the priorities of the Limassol Action Plan shows that it is considered that there has been progress in the technical-business field (sustainable development in the sector, investments, infrastructures and R&D) while there has been no progress in the policy field (harmonisation and integration of legislation).

The assessment of the specific cooperation plans (integration of the Maghrebian electricity market) has slightly positive results and very similar to each other (all between 5.7 and 5.9). However, for the question about the Mediterranean Solar Plan, which has had greater diffusion thanks to its link with UfM projects, the average rises sharply above 7, showing that the visibility of the projects directly affects their assessment.

Environmental cooperation, the pertinence of the Partnership. For the question about whether the EMP brings added value to the already established initiatives of the United Nations in the Mediterranean, all respondents unreservedly defend the pertinence of the EMP in confronting the environmental challenges of the Mediterranean.
The specific questions on the progress in three sectors identified in the Horizon 2020 strategy shows how most respondents believe that there has been no progress in these sectors, especially in that of **industrial** emissions. Moreover, the assessment of the projects carried out in this sector, SMAP III and SAFEMED II, maintain the general tendency of being slightly positive.

**Food security.** The Survey ends with the issue of food security, agriculture and rural development and a question about which issues are the most important with a view to a ministerial meeting in this field. The fact that all items proposed achieve averages above 6 and most above 7 makes clear its importance in the framework of the EMP. Those considered most important are sustainable rural development, the articulation of the CAP with the challenges of the MPCs or the strengthening of the public policies for agricultural development or activities in the field of phytosanitary norms, while the less important are the implementation of education policies on the Mediterranean diet or the extension of the CAP to the MPCs. It is significant to see that, although the articulation of the CAP with the MPCs is highly graded, its extension is much less so by EU respondents who lower the average significantly.
Global Assessment

The global assessment of the performance of the Euro-Mediterranean Partnership/Union for the Mediterranean (EMP/UfM) for the period July 2008-September 2010 is slightly negative. 51.2% of respondents assess the performance of the UfM negatively.

By institutional affiliation, policy-makers and experts make an average assessment lower than actors from civil society, who give pass grades to the UfM performance (averages of 4.4, 4.2, and 5.3, respectively). Specifically, the low grading by policy-makers is based on the assessments made by diplomats and members of European institutions who give the lowest grades in all categories (averages of 2.75 and 3.52, respectively). In relation to experts, the average assessment of think tank members is significantly lower than that of academics. On the other hand, NGO members assess the UfM performance more positively (over 54% grade it above 5).

By main area of specialisation, respondents working in “political cooperation and security” give an average lower grading than those from other professional areas related to the Euro-Mediterranean space (i.e., “economic and financial cooperation”, “social, cultural and human exchanges” and “migrations and justice affairs”. In fact, 49% of respondents specialising in political cooperation grade the performance of the EMP/UfM below 4, and more than 65% below 5.

Finally, it is worth noting that by geographical areas, the lowest assessment corresponds to respondents from Mediterranean EU countries, where more than 40% of respondents grade the performance of the EMP/UfM below 4, and from the Maghreb, where 30% of respondents grade them below 4. It is significant that these two groups represent the highest degree of knowledge (i.e., a lower percentage of “Don’t know” answers) in comparison to the remaining sub-regions. In contrast, respondents from the Balkans, Israel and the Mashreq make relatively more positive assessments.
Graph 1: Global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean in the July 2008-September 2010 period

(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey


Although the questionnaires for the 1st and 2nd Euromed Surveys are different from each other, repeating certain questions allows us to compare results.

By geographical areas, two facts stand out. On the one hand, EU respondents, and very especially those from Mediterranean EU countries, make the most negative assessment of EMP/UfM activities in the period 2008-2010, closely followed by Maghrebian respondents, who had made the most negative assessment of the EMP in the previous Survey. Meanwhile, respondents from the remaining Mediterranean Partner Countries (MPCs) assess the period 2008-2010 more positively than the period 2005-2009.

According to results from the 1st and 2nd Euromed Surveys, the average global assessment of EMP/UfM activities during the period 2005-2009 and July 2008-September 2010 is very similar. Specifically, the grading corresponding to the second period has been slightly lower (4.57 for the period 2008-2010 and 4.68 for the period 2005-2009, on a scale of 0-10). However, the close similarity of the averages conceals the distribution of answers. While in 2009, 55% of answers focused on middle grades — between 4 and 6 —, in 2010 this percentage decreases to 41%. In the current Survey, the difference seems to be distributed above and — to a greater extent — below middle grades. This new distribution, possibly influenced by the polarisation of views on the launching of the UfM, may indicate a radicalisation of perceptions of the EMP/UfM, both for positive and negative aspects.

The detailed analysis of the polarisation reveals how, in the case of EU countries, Spain and France account for the growth of the negative assessment as they experience a notable growth in answers between 0 and 3 (a highly negative assessment that increases by 40% in the case of Spain and almost 15% in the case of France). At the other extreme, the very highly positive assessment between 8 and 10 increases by 7%, driven mainly by the remaining Mediterranean EU countries (specifically based on answers from Greece and Slovenia).

The answers from the Maghreb and the Mashreq reflect this polarisation. In this case, the percentage of positive answers is double that of the previous year (from 8% to 16% in the Mashreq, and 4% to 8% in the Maghreb) (see graphs in Annex 1).

These results suggest that Southern Mediterranean Countries see the introduction of the multilateral operation of the UfM positively with a notable increase of ownership while Mediterranean EU countries would prefer the bilateral conception put forward by the UfM.

* See graphics p. 48-49, Box 1.
Assessment of the EU Presidencies and the EU and MPC Co-Presidencies

An initial surprising fact from this set of questions is the high level of ignorance, both about the European presidencies and the EU co-presidencies, revealed by a significant percentage of “Don’t know” answers (which varies between 17% and 28%).

In terms of EU presidencies, the Spanish Presidency is the best graded (6.2 on average) over the French (5.7) and the Swedish (5.5). The Czech Presidency is graded below 5 (4.3). By institutional affiliation, there is a slight trend for experts to assess all the presidencies more negatively than actors from civil society and policy-makers.

Also notable is the good assessment of the French EU Presidency by EU Mediterranean countries (not exclusively although highly influenced by French respondents) in comparison to the low assessment by Turkish respondents; and the good assessment of the Swedish EU Presidency in the Mashreq or the fact that, within its good results, the Spanish EU Presidency is more positively assessed by non-Mediterranean EU countries and those of the Mashreq.

The French and Egyptian Co-Presidency of the UfM is, in general, more negatively assessed than their European counterparts. Average assessments reveal middle positions in both cases although slightly higher in the case of France (5.0, more than half a point lower than the assessment of its European Presidency period) than Egypt (4.6). By institutional affiliation, the results follow a similar pattern to answers related to the European presidencies (i.e., grades slightly lower in the views of the group of experts).

The respective presidencies were unable to get the political machinery moving in order to enable the key technical projects. Furthermore, political uncertainties and conflict greatly hindered the political process to advance. Due to this blockage, very little was achieved under the various presidencies.

United States respondent

Il n'y a plus aucune visibilité de l'action des présidences au niveau de l'espace Euromed.

Tunisian respondent

La copresidencia ha adolecido de falta de liderazgo colectivo.

Spanish respondent

By geographical areas, the assessment of the Egyptian Co-Presidency of the UfM reveals that, with the exception of the view of Egyptians surveyed who raise the average of the Mashreq group to over 5, the remaining sub-regions have average grades of below 5 (in the case of Maghrebian respondents, the grade decreases to 3.15). Moreover, the French Co-Presidency of the UfM is more negatively assessed by Maghrebian and Turkish respondents, while it is more positively graded by respondents from the Mashreq, Israel and the Balkans. The average assessment of the French Co-Presidency by the Mediterranean EU countries is around the global average (including French respondents who, in general and similarly to the remaining respondents, assess the Co-Presidency of the UfM more negatively than the European Presidency).
Graph 2: Grading the action of the different EU Presidencies and Co-Presidencies of the Union for the Mediterranean (UfM)

(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Union for the Mediterranean Secretariat

With an average of 4.5 out of 10 and 50% of respondents under 5, the progress achieved in the launching of the UfM Secretariat is generally assessed as insufficient.

The assessment of the progress in establishing the UfM Secretariat does not show major differences either by area of specialisation or institutional affiliation. The only notable aspect is that civil society respondents assess this progress more positively (global average of the category is the only one that reaches 5). In addition, the analysis by geographical areas does not reveal significant divergences, although again the most negative assessments by respondents from the Maghreb and Mediterranean EU countries stand out.

However, the expectations of the role that the Secretariat will play in the new institutional architecture are more optimistic.1 Among those who have a formed view in this respect, more than 55% grade the future contribution of the Secretariat above 5 and more than 30% above 7.

It could play a meaningful role if there is a clear roadmap with targets, specific actions and monitoring.

Belgian respondent

Due to the slow political process, and the fragility of the Secretariat (no funding allocated), we can expect that the UfM will give guidelines and objectives for the integration process, but will have little impact on the implementation side.

Egyptian respondent

Fondé sur un principe intergouvernemental, le secrétariat risque de connaître la paralysie en raison des tensions inter étatiques. Pour l’instant, il ne semble être qu’une bureaucratie déconnectée des réalités.

Italian respondent

1. Question B4, “How would you assess progress made regarding the setting up of the UfM Secretariat between November 2008 and September 2010?”, was asked after the resignation of the Secretary General of the UfM.
It is worth noting that the expectations of the “experts” (think tank analysts, academics and journalists) are slightly less optimistic. In relation to area of specialisation, the professionals of “political cooperation and security” are the respondents with the lowest expectations in relation to the role of the UfM.

By regions, it is significant that EU respondents – both Mediterranean and non-Mediterranean – anticipate, along with Turkish respondents, the worst prospects for the future of the Secretariat. Meanwhile, respondents from the Maghreb and the Mashreq countries, along with Israel, anticipate the best.

**Graph 3: Assessment of progress made regarding the setting up of the UfM Secretariat between November 2008 and September 2010**
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

**Graph 4: UfM Secretariat’s role in the new Euro-Mediterranean institutional architecture in the near future**
(average on a scale of 0-10, where 0 stands for negligible role, and 10 for key role)
BOX 2: Assessment of the UfM Secretariat: 2009 and 2010

The question about the future role of the UfM Secretariat on a scale between negligible (0) or key (10) shows how the average is practically identical between the two Surveys. This similarity is curious given that in the 2009 Survey the Secretariat had not yet been implemented while in 2010 it had already had a Secretary General since January. The poor visibility of the Secretariat’s activity (or scarce activity) could explain this low variation. Moreover, the comparison according to geographical origin of the respondents shows that in all regions the grades of the average assessments increase – to a greater or lesser extent – except in the case of respondents from Mediterranean EU countries, who more positively graded the role of the Secretariat in 2009 (along with Maghrebians) and now assess it most negatively. Finally the Turks, both in 2009 and 2010, were the most critical of the Secretariat.

Graph 5: UfM Secretariat’s role in the new Euro-Mediterranean institutional architecture in the near future. Comparing 2009 and 2010 results

(average on a scale of 0-10, where 0 stands for negligible role, and 10 for key role)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Union for the Mediterranean Summits

In relation to the role of Euro-Mediterranean summits, there are no significant differences between respondents by institutional affiliation or by area of professional specialisation. By geographical areas, there are also no great differences, with the exception of Maghrebian respondents, who are more sceptical than others about the importance of these summits.

Summits create media buzz, which helps create awareness and potentially a UfM identity.

German respondent

La importance théorique est très haute car c’est au cours de ces sommets que devrait se mettre en place en place la politique de l’UpM. Malheureusement, de reports en reports, ces sommets deviennent virtuels et la politique de l’UpM le faut également.

French respondent

Les réunions des Chefs d’Etat donnent l’illusion d’une intégration. Quan un projet n’avance pas on multiplie les réunions au sommet pour laisser croire que les choses avancent, alors que sur le terrain peu de progrès sont faits.

Algerian respondent
Progress Achieved in the Implementation of the Following Euro-Mediterranean Sectoral Strategies and Action Plans

The question about the sectoral strategies and action plans covers two aspects: on the one hand, their importance in relation to the Euro-Mediterranean objectives and, on the other, progress in their implementation. Firstly, it is worth pointing out the high level of ignorance about the sectoral strategies at around 20% when the question focuses on their importance for achieving the Partnership’s objectives. This percentage doubles in the question about progress in the implementation of such strategies (the percentage of respondents that claim ignorance about the level of implementation oscillates at around 40%). Thus, despite the importance of these fields, the visibility of the specific Euro-Mediterranean plans is very limited.

The percentage of “Don’t know” answers to the questions about these plans is greater for policy-makers and actors from civil society than experts when the results are analysed by institution. By area of specialisation, professionals of the socio-cultural field express greater ignorance of the plans; a more than logical result considering their mainly economic nature. By geographical areas, the regions with a higher “Don’t know” percentage in all questions related to strategies and action plans are the Mashreq, Israel, non-Mediterranean EU countries and the Balkans.

Sans disposer d’informations pertinentes il est difficile de se positionner dans une échelle de valeurs.

Moroccan respondent

In relation to the assessment of their importance to the objectives of the Partnership, it should be noted that all of them are important for respondents (average above 7 in all cases). The most important are related to the fields of water (8.3) and energy (7.9). Transport and employment come next (7.6), followed by industrial cooperation, the role of women and maritime strategy (7.4). Finally, tourism has an average of 7.1.

Tous ces plans sont importants, mais les moyens mis en œuvre restent dérisoires.

Algerian respondent

Graph 6: Importance of the Euro-Mediterranean action plans and sectoral strategies for Euromed objectives (average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
In the analysis according to origin of respondents, there are also no major differences, although EU respondents tend to assess them more positively than those from MPCs (except in industrial cooperation and tourism). It is also notable that the average of participants from the Maghreb is always below the global average and there are no major differences according to the sector about which they are asked. In contrast, in the Mashreq, tourism or employment programmes are more positively assessed in comparison with water or gender programmes, which are assessed more negatively.

It should be noted that EU countries assess the importance of gender programmes above the average while MPCs make a below average assessment. Among MPCs there are also significant differences such as in relation to the Working Programme on Tourism. Its importance is very positively assessed in the Mashreq and especially in Turkey (almost 70% of Turkish respondents grade it 8 or more. In contrast, among Maghrebian this percentage does not reach 40%).

In terms of the progress of these initiatives, it is significant that in only two of the eight initiatives over 50% of respondents say that there has been progress (Istanbul Action Plan on Strengthening the Role of Women in Society, and Priority Action Plan on Energy). In relation to the implementation of the six remaining initiatives, most respondents consider that there has been no progress or, even, regression. In this respect, the least positively assessed initiatives are: the Mediterranean Maritime Strategy, the Mediterranean Water Strategy and, mainly, the Employment Framework of Actions. The latter, despite its importance, has the highest regression percentages (21%) and lack of progress (59%).

Graph 7: Assessment of the progress achieved of the Euro-Mediterranean action plans and sectoral strategies

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
Gender, employment and water are very important strategies that should be addressed properly and quickly in order to secure progress in the other sectoral strategies.

Lebanese respondent

Ces objectifs sont tous importants mais ne bénéficient d’aucune action concrète supplémentaire. Les progrès enregistrés le sont de façon quasi indépendante du processus.

French respondent

Unfortunately, the free circulation of people as well as the encouragement of the democratization process of the regimes in the southern shore of the Mediterranean seems to be neglected.

Algerian respondent

If we analyse the results on the progress of sectoral strategies and plans according to institutional affiliation, we see important differences; thus, 50% of policy-makers consider that cooperation has progressed. This is repeated in the assessment by experts of the Transport Action Plan or among actors from civil society when assessing the programme on tourism.

By area of specialisation, the most common differences are in grades within the same general trend. There are, however, exceptions. Such is the case of the assessment of the Istanbul Action Plan which, for most professionals surveyed from the field of “political cooperation and security” and in contrast to the general trend, has not progressed.

By regions, the assessment of the implementation of plans does entail differences. In terms of the Istanbul Action Plan there seem to be more doubts about its progress in the Maghreb and the Mediterranean EU than in other groups. As for transport, in contrast, there is a clear division between EU respondents (who mostly consider that there has been progress) and MPC respondents (with the exception of Turkey) who mainly believe the contrary. Differences between regions also emerge when dealing with the Tourism Programme, as most respondents, both from the Maghreb and the Mediterranean EU, consider that there has been no progress, in contrast to the other regions. This critical assessment (to which in this case Turkish respondents are added) is repeated for the assessment of industrial cooperation. In the remaining action plans and strategies, differences between regions, although they exist, do not feature such high levels.

Union for the Mediterranean Projects

The question about the UfM projects follows the same pattern: its importance for achieving the Partnership objectives and its progress are assessed. Firstly, it is important to note that, in general, 15% of respondents are unfamiliar with their importance and between 28% and 40% do not know their level of implementation. Secondly, it is important to note that, despite the high level of ignorance, the UfM projects seem to enjoy greater visibility than the programmes and action plans of the Euro-Mediterranean Partnership.

By institutional affiliation, the level of knowledge of the projects is slightly higher among experts. By area of specialisation, there is a trend to greater knowledge by respondents who are professionals in the economic field. This difference increases in the case of the project focused on small- and medium-sized enterprises.
In relation to the assessment of their importance for achieving the objectives of the Partnership, it is worth emphasising that all of them are important for respondents. The average grade for the importance of the different projects is not only very high but has very few variations (between 7.7 and 8). It is highly significant that there are also no important variations in these assessments by institutional affiliation or by area of specialisation (beyond the slightly more positive assessment of the Mediterranean Solar Plan by respondents from the socio-cultural field or the more positive assessment by professionals from the economic field of the Mediterranean Business Development Initiative focused on small- and medium-sized enterprises). The differences by geographical origin of the respondents are also very small.

Graph 8: Assessment of the importance of the six projects selected in the framework of the UfM for Euromed objectives
(average on a scale of 0-10, where 0 stands for no importance, and 10 for very high importance)

However, in relation to respondents’ perception of the progress achieved in the six UfM projects there are major differences. In only two of the six projects — the Mediterranean Solar Plan and the Euro-Mediterranean University — more than half of the respondents consider that there has been progress. In contrast, only 46% sees progress in the initiative aimed at SMEs and less than 40% believes that there has been progress in the remaining projects. Significantly, the projects considered to have progressed most are also the best known.

Graph 9: Assessment of the progress achieved of the the six projects selected in the framework of the UfM
(average on a scale of 0-10, where 0 stands for no importance, and 10 for very high importance)
By areas of specialisation of respondents, it is significant that the “social and cultural cooperation” professionals see greater progress, compared with the other professional specialities, in the projects related with maritime and land highways, civil protection, Euro-Mediterranean University and — together with the professionals of economic and financial cooperation — support for SMEs.

By geographical origin of respondents, there is more diversity in the assessment of the progress of some projects. For example, the Euro-Mediterranean University (EMUNI) has progressed much more for respondents of the Mashreq, Turkey and the non-Mediterranean EU than for respondents from the Maghreb or Mediterranean EU countries. This pattern is repeated (although with smaller variations) when assessing the SME initiative. The contrary, both in grades and regions involved, is seen in the assessment of maritime and land highways and civil protection projects, in which respondents from the Maghreb and the Mediterranean EU consider that it has progressed more than other regions.

**New Projects of the Union for the Mediterranean**

When respondents were asked to assess the importance of nine proposals that could be future UfM projects, they assessed all proposals positively (the least positively assessed obtained an average of 6.3). Respondents considered more important the proposal to create a Mediterranean Youth Office to facilitate the mobility of Mediterranean students (more than 25% of respondents grade its importance with a 10) and the creation of a Mediterranean Junior Erasmus Programme. Moreover, the project to strengthen participation of women in public life also obtains a high grade. In contrast, the least positively assessed projects are the creation of a cultural TV channel for the Mediterranean and the creation of a Euro-Mediterranean arbitration court.

**Graph 10: Assessment of the importance of other new projects proposed for the UfM**
(average on a scale of 0-10, where 0 stands for no importance, and 10 for very high importance)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

The disaggregated data by groups — institutional affiliation, area of professional specialisation and geographical origin of respondent — does not show relevant differences.

It should be noted that the “Mediterranean Investment Guarantee Convention” is most positively assessed by professionals surveyed in the economic and financial field, while low grades by respondents from the political ambit stand out, both for the cultural TV channel and the “Mediterranean Cancer Plan”. The differences in the assessment of the two proposals related...
to gender equality by sex of the respondent are also significant (women assessed them as more important).

By geographical origin, it is notable that while EU respondents grade the “Erasmus Euromed” proposal more positively (7.9) than MPC respondents (7.6), respondents from Mediterranean countries prioritise other proposals, such as the “Mediterranean Cancer Plan” (7.6 out of 10), the “Mediterranean Youth Office” (8.1), the “Mediterranean Agency for Urban Development” (7.7) or the “Mediterranean Women’s Foundation” (7.9) (in which the importance given by Turkish respondents stands out).

A “Mediterranean Agency for Urban Development” would be relevant and contributory only if it sought alternatives to urbanization and redistributed assets to rural development and relieving indebted small farmers.

United States respondent

Any project for enhancing democracy in Mediterranean countries.

Jordan respondent

Anything relating to youth, migration and adult education.

Turkish respondent

Creación de una agencia euromediterránea de innovación, y generar una mayor participación de los países del sur del Mediterráneo en los programas europeos de cooperación tecnológica.

Spanish respondent

Création d’une banque d’investissement euro-méditerranéenne

Algerian respondent

Mise en place d’une Banque Euro-méditerranéenne d’Investissements

Tunisian respondent

Gestion des flux migratoires, renforcement de la société civile, initiatives en faveur de la garantie de la liberté d’expressions démocratique et droits de l’homme

Tunisian respondent

Rather than taking on new projects and diluting its agenda, the UfM should focus on the existing ones which have made little progress.

German respondent

Impact of the Eastern Partnership

When respondents are asked to assess the impact of the Eastern Partnership on Euro-Mediterranean relations, it is surprising that, in addition to a high level of “Don’t know” answers especially among the MPCs (25%), respondents do not seem to have a clear idea of the impact of this partnership on Euromed relations, opting for middle grades (an global average of 5.2 and over 56% of answers between 4 and 6). In any case, it is significant that the results by geographical origin show that respondents from the Maghreb are the most pessimistic in terms of this impact, while a higher proportion of Turks and non-Mediterranean Europeans believe that the impact will be positive.

2. The Eastern Partnership was launched in March 2009 between the EU and six Eastern European states (Armenia, Azerbaijan, Belarus, Georgia, Moldavia and Ukraine).
Será inevitable un giro de la atención europea hacia el Este, cuando sería necesario mantener la atención centrada en el Mediterráneo, como punto fundamental en el futuro tricontinental.

Spanish respondent

Both are elements of the EU’s efforts to ensure stability in its neighbourhood. It seems that the Eastern Partnership is a bit more productive.

German respondent

It will, on the one hand, be positive by showing better strategies and cooperation that can be a role model for any regional organisation. On the other hand, it will take too much energy for the EU to handle and deliver meaningful results.

Slovenian respondent

L’Europe a favorisé le développement de ses relations avec les pays de l’Est au détriment de ses relations avec les pays de la rive sud et est de la Méditerranée.

Tunisian respondent

**European External Action Service**

On the effect of the new EU external action on Euro-Mediterranean relations, respondents maintain a moderate optimism (average of 6.5) with few variations in relation to institutional affiliation, area of specialisation or geographical origin of the respondent. However, the difference between respondents from the Mashreq and the Maghreb is notable. The Mashreq has the most positive assessment (an average of 7 and 60% of respondents grading it with 7 or higher) while the Maghreb has the lowest average together with Mediterranean EU countries (6.3 average and almost 25% grading it with 4 or lower). It is also worth noting that 23% of participants are unable to assess the impact of the new European External Action Service.
Annexing foreign aid to the external policy can have some negative impact on the policy of aid and investment because this reflects the concern to tie aid and solidarity to the political agenda of the EU foreign policy.

Lebanese respondent
Positif à condition que la Commission Européenne joue un rôle important et les diplomatie nationales n’entravent pas l’action du service européen.

Italian respondent

EU Financial Prospects 2014-2020

In relation to the current financial instruments and modalities of Euro-Mediterranean cooperation, an overwhelming majority is in favour of their revision. On a scale of 0 to 10, where 0 stands for no need and 10 for very necessary, 80% of respondents graded it 7 or higher. The analysis by institutional affiliation, area of professional specialisation and origin of respondents yields average high results in all categories. However, it is notable that both “political and security cooperation” professionals and respondents from EU Mediterranean countries assess them least positively.
The situation is now very different. The EU will not grow much further. As the majority of MPCs are not accession candidates, completely new instruments and policy frameworks are absolutely necessary.

German respondent

La FEMIP devrait se transformer en Banque Euro-Méditerranéenne pour donner plus d'élan à l'action dans cette zone.

Tunisian respondent

There is need to unify some of the instruments into one or two. Equally significant, however, is the policy of crediting those MPCs, like Morocco, by reinforcing such already existing benefits as the statut avancé and extending them to other countries that make progress on the political and civil society fronts.

Israeli respondent

**Priority and Probability of New Financial Instruments in the Mediterranean**

The question on new types of financial instruments that could be implemented in the area (macroregion, participation of the MPCs in EU structural funds or a new Regional Programme in the framework of the ENPI) had a dual nature: it asked about the priority given to each of the proposals and also the probability of their implementation.

According to the priority level given, the experts and policy-makers surveyed were quite clear: the priority is a new regional programme in the framework of the ENPI (7.5 on average), followed by the mechanisms to ensure participation of MPCs in the structural funds (6.7) and finally the Mediterranean macroregion (6.0). This priority is repeated without great variations independently of institutional affiliation, area of professional specialisation or geographical origin of the respondent. As an exception to this, we must note the case of non-Mediterranean EU respondents who positively assess the macroregion more than access to structural funds.

However, respondents are sceptical about the possible creation of the aforementioned instruments. First, the average perception of the probability of implementing each instrument is significantly lower than the average importance given to the future instrument. It seems that the Euro-Mediterranean process is perceived by respondents as little inclined to abandon the status quo. In accordance with the available data, the creation of the new Regional Programme is considered more feasible than the inclusion of the MPCs in the structural funds or the creation of a Mediterranean macroregion (the respective average probabilities are 6.0, 5.3 and 5.2).

Just as in the priorities, there are no significant differences between the average answers of the different categories of analysis.
Graph 14: Level of priority and level of probability to new financial instruments which could eventually be implemented in the Mediterranean
(average on a scale of 0-10, where 0 stands for less, and 10 for more)

Other Instruments Proposed:

- ENPI should focus on the social and economic development and it should be revised based on the rights-based approach.
  
  Lebanese respondent

- Investing in cross-regional infrastructure projects through well-planned public-private partnerships projects.
  
  Croatian respondent

- Look for opportunities and strategies of attracting Gulf countries direct or indirect capital investments to UfM projects.
  
  Turkish respondent

- The Baltic region is a good example of bottom-up design and strategy.
  
  Italian respondent

Probability of Increased Funds for Financial Cooperation of the EU with SMEs

For respondents, the probability that the new financial prospects will increase funds for SMEs could be called rather pessimistic (average 4.7). The fact that the results draw almost a normal curve around 5 reflects the doubts about the possibility of resources increasing. It is significant that EU respondents (i.e., those from countries providing these funds) are the most pessimistic in terms of this possibility while those from receiving countries are more optimistic (especially those from the Mashreq).
Graph 15: Probability of new Financial Perspectives increasing substantially (i.e., more than 30%) the available funds for EU-Mediterranean Partner Countries’ financial cooperation (i.e., the financial envelope for the ENPI-South)

(average on a scale of 0-10, where 0 stands for low probability, and 10 for very high probability)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Potential Hypotheses in the Medium and Long Term in the Mediterranean (Maintaining the Current Level and Modes of Cooperation)

Question B14, also in the previous Survey, asked respondents to determine the probability of a series of hypotheses occurring in the medium term. Among the different hypotheses proposed to respondents were scenarios both favourable and unfavourable for the future of the region. According to the average probability given to each of the possible scenarios, there are three sets of hypotheses: the most probable (averages above 7.0), probable (averages between 6 and 7) and least probable (averages below 6).

Included in the block of most probable hypotheses are, firstly, that “water scarcity will become a source of conflicts and social tensions in the Mediterranean” (7.5), followed by the hypothesis that an “increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe” (7.3), that an “increased level of migration will push for political reforms in the Mediterranean Partner Countries” (7.1), that “the Arab-Israeli conflict will paralyse the EMP” (7.1) or that “population and employment pressures in MPCs will intensify and create dramatic social tensions” (7.1). It is notable that all the scenarios seen as most probable have a strong negative outlook directly related to the development of tensions and conflicts.

The following block of probable hypotheses includes more “pessimistic” scenarios, such as the possibility that “environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States” (6.6), that “political regimes in MPCs will show a high degree of continuity” (6.9) or that “the current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period” (6.3) together with others that are more “optimistic”, such as the view that “women will increasingly participate in the economic, social and political life of MPCs” (6.7) or that “free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean” (6.1).

3. The Survey was conducted between October and December 2010.
The other hypotheses – of a more clearly optimistic outlook – are considered the least plausible. Thus, the possibility that “MPCs will sustain the increased level of economic growth achieved in the last three years and, in the long term, converge to EU levels of income” (5.2), that “Gulf Cooperation Council members will facilitate a higher degree of South-South economic cooperation in the Mediterranean”, (5.5), that the “increased level of migration will push for political reforms in the Mediterranean Partner Countries” (5.6) or “the increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity” (5.2) do not achieve grades above 6. Results by geographical origin of respondents have significant variations. In the Maghreb the idea that “water scarcity will become a source of conflicts and social tensions in the Mediterranean” (5.2) takes second place behind the paralysation of the EMP by the Arab-Israeli conflict, which becomes the most probable hypothesis in the region. Meanwhile, in other areas – such as the Mediterranean EU, Turkey or Israel – the most probable prospect is that an “increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe.” Curiously, this last hypothesis has an average above 7 in all regions analysed except for respondents from the Maghreb (whose average prediction – 6.6 – occupies ninth position, out of fourteen, in the ranking of contingencies).

Maghrebian respondents also consider it comparatively more probable that prosperity thanks to the free movement of people and goods and the participation of women in the public sphere will increase; an aspect that coincides with respondents from the Mashreq. Notable among
respondents from the Mashreq, however, is the appearance of social tensions due to population and employment pressure, as a very probable scenario (7.8).

Notable in European Union respondents’ assessments of the hypotheses on economic convergence between the MPCs and the EU – although less positive than those of the MPCs –, are the creation of an area of shared prosperity, development of a shared Mediterranean identity or participation in public life of women from the MPCs.

Moreover, it is important to note that, in comparison with policy-makers and experts, actors from civil society consider it less probable that the political regimes will show continuity or that the Arab-Israeli conflict will end by paralysing the EMP and more probable that migrations will finally foster political reforms in the MPCs. Meanwhile, policy-makers’ assessments are more similar to the global average and experts consider both the emergence of a Mediterranean identity and the creation of an area of shared prosperity highly improbable.

By area of specialisation, it is notable that professionals in the field of “political and security cooperation” consider the paralysation of the EMP by the conflict or the continuity of the political regimes more probable that the other categories, while they consider both the emergence of a Mediterranean identity and the economic convergence of the MPCs at European levels improbable.

**Other Potential Hypotheses in the Medium and Long Term**

Il faut transformer la migration, le niveau des échanges économiques et humains en moteur ou une force de construction de l’espace méditerranéen.

French respondent

La participation des femmes a la vie économique sociale et politique des PPM est de plus importante en dehors même de toute coopération Euromed devrait intégrer cette réalité pour mieux contribuer à ce scénario.

Algerian respondent

The global economic prospects for the Mediterranean are not bad but there is no sign of sufficient progress to ameliorate the social and political tensions.

Irish respondent

In relation to the contribution of current cooperation to macroeconomic convergence in terms of GDP per capita, most respondents do not see the impact of economic cooperation on the convergence of income levels clearly. By geographical origin of respondents, there are also few differences. However, it should be noted that respondents from the Mashreq assess more positively the contribution of Euromed cooperation (5.5) while the other regions have grades below the average, especially in the case of non-Mediterranean EU countries.
Graph 17: Assessment of the contribution of the current Euro-Mediterranean economic and financial cooperation (including Euromed Free Trade Area 2010, sectoral cooperation and ENPI) to real convergence of income levels (measured in GDP per capita) across the Mediterranean.

(average on a scale of 0-10, where 0 stands for no contribution, and 10 for high contribution)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

GDP is not a relevant indicator. Gini rates and redistribution will be the criteria of progress.

*Egyptian respondent*

Free trade benefit means equal chances if the countries have the same economic size or performance and have comparative advantage in production, but southern Mediterranean countries have no technology, low knowledge, and inefficient education system.

*Moroccan respondent*

Mejor que exista que no lo contrario, aunque aún está por hacerse una evaluación sobre la convergencia que producen esos fondos.

*Spanish respondent*
**BOX 3: Future hypotheses 2009 to 2010**

The question on the probability that there will be a series of hypotheses in the medium or long term has been included in the two Euromed Surveys. Globally, we see that in 2010 all the hypotheses put forward are regarded as more plausible than in the 2009 Survey (i.e., the average probability of all the options has significantly increased).

### Ranking of probability attributed to distinct potential hypotheses in the medium and long term in the Mediterranean (comparative results 2009-2010)

<table>
<thead>
<tr>
<th>Hypothesis</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Water scarcity</strong> will become a source of conflicts and social tensions in the Mediterranean</td>
<td>1st</td>
<td>1st</td>
</tr>
<tr>
<td>Increased level of legal and <em>irregular migration</em> will intensify social tensions and xenophobia in Europe</td>
<td>2nd</td>
<td>6th</td>
</tr>
<tr>
<td><em>Irregular migration</em> from originating MPCs to Europe will continue to increase whatever control mechanisms the EU may impose</td>
<td>3rd</td>
<td>4th</td>
</tr>
<tr>
<td>The Arab-Israeli <em>conflict</em> will paralyse the EMP</td>
<td>4th</td>
<td>2nd</td>
</tr>
<tr>
<td><strong>Population and employment pressures</strong> in MPCs will intensify and create dramatic social tensions</td>
<td>5th</td>
<td>3rd</td>
</tr>
<tr>
<td><strong>Political regimes</strong> in MPCs will show a high degree of <em>continuity</em></td>
<td>6th</td>
<td>5th</td>
</tr>
<tr>
<td><strong>Women</strong> will <em>increasingly participate</em> in the economic, social and political life of MPCs</td>
<td>7th</td>
<td>7th</td>
</tr>
<tr>
<td><strong>Environment deterioration</strong> in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States</td>
<td>8th</td>
<td>8th</td>
</tr>
<tr>
<td>The current global economic and financial <em>crisis</em> will reduce development prospects in the Mediterranean for a long period</td>
<td>9th</td>
<td>9th</td>
</tr>
<tr>
<td><strong>Free movement of goods and workers</strong> will create an area of shared <em>prosperity</em> and development in the Mediterranean</td>
<td>10th</td>
<td>10th</td>
</tr>
<tr>
<td><strong>Gulf Cooperation Council members will facilitate a higher degree of <em>South-South</em> economic cooperation in the Mediterranean</strong></td>
<td>11th</td>
<td>11th</td>
</tr>
<tr>
<td><strong>MPCs</strong> will sustain the increased level of economic growth achieved in the last three years and, in the long term, <em>converge to EU levels</em> of income</td>
<td>12th</td>
<td>13th</td>
</tr>
<tr>
<td>The increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity</td>
<td>13th</td>
<td>12th</td>
</tr>
</tbody>
</table>

The most outstanding elements of the comparison between the results of 2009 and 2010 are:

- Water scarcity and the associated conflicts and tensions are still the main concern.
- The consequences of irregular immigration, both in destination societies and in migratory management policy in the region, appear as the new most outstanding elements in the medium and short term.
- The impact of the Arab-Israeli conflict on the EMP is losing significance.
- There is practically no variation in the other elements between the Surveys.
Box 1: The general assessment of the Euro-Mediterranean Partnership (2009-2010)

**General Assessment of the EMP/UIF**

(% of answers on a 0-10 scale, where 0 stands for very disappointing, and 10 for very positive)

**Maghreb**

(% of answers on a 0-10 scale, where 0 stands for very disappointing, and 10 for very positive)

**Mashreq**

(% of answers on a 0-10 scale, where 0 stands for very disappointing, and 10 for very positive)

**European Union**

(% of answers on a 0-10 scale, where 0 stands for very disappointing, and 10 for very positive)
Mediterranean EU Countries
(% of answers on a 0-10 scale, where 0 stands for very disappointing, and 10 for very positive)

Spain
(% of answers on a 0-10 scale, where 0 stands for very disappointing, and 10 for very positive)

France
(% of answers on a 0-10 scale, where 0 stands for very disappointing, and 10 for very positive)
THE EURO-MEDITERRANEAN FREE TRADE AREA (EMFTA) IN 2010 AND BEYOND, AND THE ECONOMIC AND FINANCIAL COOPERATION
General Economic Context

The first question of the thematic dossier asks respondents about the plausibility of six scenarios related to the effects of the economic crisis on the Euro-Mediterranean Partnership (the first part focuses on the possible positive implications and the second on negative implications).

For respondents, the negative scenarios are slightly more probable (averages above 6) than the positive (all with an average between 5 and 6). The most probable for all respondents is that the economic crisis "will highlight the focus of the EU to resolve its own economic problems without integrating the MPCs in its economic strategies" (average probability of 6.6 on a scale 0-10) while the least probable scenario is that which postulates that "(the crisis) will highlight the need for more Euro-Mediterranean cooperation and for joint strategies across the Mediterranean" (average of 5.3). The most probable scenario postulates that European companies will invest in the MPCs to reduce costs and expand markets (average of 5.9).

I purposely rated these at five as things are definitely clouded at this point. It all hinges on the ability of the EU to bounce back by coming out of the global crisis. The EU’s search for new markets in the MPCs will depend on the degree of attractiveness of these markets, the political stability, and the quality of infrastructures.

Israeli respondent

Il paraît évident que les délocalisations et investissements européens privilégient d'autres espaces économiques, notamment asiatiques: en Chine, en Inde, au Vietnam, etc.

Algerian respondent.

The EU (…) is a transient body, a way-station in a process from past to future: it will not, nor could or should, exist for ever. That is, the concepts of "EU" and "Neighbourhood" have a limited lifetime. Either the EU will expand to extend full membership to non-European countries (e.g. Turkey, Israel, Morocco, Armenia, Lebanon, etc), thus being by definition no longer “European”, or it will inevitably act in its own interests (especially in times of crisis).

British respondent

The differences according to geographical origin of the respondent are minimal, especially in the negative scenarios, which are assessed very similarly by the different respondents. In terms of positive scenarios, there are few differences between respondents from the MPCs and EU countries. MPC respondents are slightly more optimistic than Europeans (and, among the latter, respondents from a non-Mediterranean origin are even more pessimistic than their Mediterranean counterparts).

Differences between categories are also very small for the remaining groups analysed. We should point out that, when assessing the positive aspects, both experts (in terms of institutional affiliation) and professionals of political cooperation and security (in terms of area of specialisation) give the systematically lower grades.
When asked to qualify the added value of the Euro-Mediterranean Free Trade Area (EMFTA) in relation to the overall globalisation process and trade liberalisation, respondents express clearly positive views (the generic average is 6.6, where 0 stands for no added value and 10 for very high added value. Moreover, more than 70% of respondents grade it above 5 and more than 56% above 6).

For economic prosperity in the region, the quest for governance is vital, along with human rights issues, which the EU must also focus on, although many members have difficulties with it.

Slovenian respondent

Convergence of Mediterranean Southern Neighbours into the EU level of legislation and procedures will enhance the transparency, effectiveness and competitiveness of the MPC markets. Hence, allow more global integration and convergence of values and culture.

Egyptian respondent

From the analysis of results according to geographical origin, it is notable that Mashreq respondents grade economic integration most positively (7.1 on average). It is significant that, although very close to the overall average, the region that grades this added value least positively is in fact the Maghreb (6.3).
Graph 2: Grading the added value of regional economic integration in the Mediterranean (in particular through the creation of the Euro-Mediterranean Free Trade Area) in relation to the general process of globalisation and global trade liberalisation

(average on a scale of 0-10, where 0 stands for no added value, and 10 for very high added value)

In addition, overall, respondents consider it quite plausible that economic actors outside the Partnership — USA, China and the Gulf countries — are gradually displacing the prevailing economic role of the EU, both in the Maghreb (5.8 on average) and the Mashreq (6.6 on average).1

It is paradoxical that respondents from the Maghreb, whose countries are proportionally more integrated into the EU at trade level, consider the displacement of the EU as a preponderant economic actor both in the Maghreb and the Mashreq more plausible (respective averages of 7.3 and 6.7). Meanwhile, the predictions of respondents from the Mashreq and non-Mediterranean EU countries are more cautious (Mashreq respondents grade the probabilities of the displacement taking place in their own region slightly below the overall average – 6.43 – while in the Maghreb they grade the possibilities below the overall average – 5.1 –).

With regard to trade, the EU has a deep and multileveled presence which distant actors or hydrocarbon giants are unlikely to rival.

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1. These perceptions are not surprising if we consider the growth rate of MPC exports between 1996 and 2006. When exports to the EU have increased at a rate of 6.4%, those targeted to the rest of the world have increased at a rate of 15.6% per year. Significantly, exports to NAFTA countries and the Gulf Cooperation Council increased at a rate of 14% and 18%, respectively.
I. The Euro-Mediterranean Free Trade Area and the EU-Turkey Custom Union

A set of questions asked about the implementation of the EMFTA both at a regional and national level.²

The progress in the implementation of the EMFTA at a regional level obtains an average grade very close to 5 (4.9), which corresponds to an almost symmetrical distribution of answers around the average (5). Specifically, 34.3% of respondents grade the implementation with a 5. The remaining 65.7% is equally distributed between those who grade it positively – above 5 – and those who grade it negatively – below 5.

However, respondents believe that progress in the implementation of the EMFTA has been unequal depending on the country concerned. In accordance with the data available, we can establish three country categories. Those in which the implementation is considered positive (with averages above 6) – Morocco, Tunisia and Israel –; a second category of countries in which the average assessment of the implementation is slightly positive (between 5 and 6) – Jordan, Lebanon and Egypt –; and, finally, a third category, which includes Algeria and the Palestinian Occupied Territories, for which it is considered that the progress in the implementation of the EMFTA has been negative (between 4 and 5).

Returning to the assessment of the implementation of the EMFTA at a sub-regional level, the grades of respondents from the Maghreb and Mediterranean EU are systematically lower than the whole, while the grades of respondents from the Mashreq and the non-Mediterranean EU are higher.

Le Maroc et la Tunisie sont des bons élèves, l’Algérie traîne, le Liban progresse, la Jordanie est le meilleur élève du Mashreq et l’Egypte se réforme mais lentement.

Belgian respondent

The agreements with the largest technical components will be the one to progress and survive. Whereas, political agreements are bound to crash.

Egyptian respondent

2. The set of countries included all those that until today have signed Association Agreements: Morocco, Algeria, Tunisia, Egypt, the Palestinian Authority, Israel and Lebanon. Given that the Association Agreement with Syria has not yet been signed and ratified and the economic integration between the EU and Turkey after the signing of the Customs Union exceeds the prospects of a traditional free trade area, neither country was considered in the questionnaire.
The assessment of the progress made in the implementation of the EMFTA in each country is quite disparate.\(^3\)

The assessment of the EMFTA in **Tunisia**, average 6.3, is logically one of the highest in keeping with its impact on macroeconomic development. The assessment of the implementation in **Morocco** is around 6.3 (both for Moroccans themselves – 6.2 – and for all respondents – 6.3). In the case of Morocco, in contrast with Tunisia, econometric impact studies do not yet show significant effects on the volume of trade flows. However, the current negotiations in terms of liberalisation of the service market, along with the close trade relationship that has traditionally linked Morocco and the EU,\(^4\) can explain the positive perception of respondents in relation to the implementation of the EMFTA.

The response of Israelis to the implementation of the ZEMLC in **Israel** is identically high in the overall average (6.2), although grades from the Maghreb and the Mashreq are higher than the average.

In general, the implementation of the EMFTA in **Jordan** is seen more positively by the whole of the sample (5.7) than by Jordanian respondents themselves (4.9). The differential in perceptions could have its origin in the unawareness of Jordanian trade exchanges by Southern Mediterranean countries (with which there is hardly any trade) and an over-assessment of trade benefits by EU respondents (perhaps due to the trade imbalance between the EU and Jordan which, in 2010, reached €2,231.1 million in favour of the former).\(^5\)

In the case of **Lebanon**, Lebanese nationals give an average grade (5.2), very similar to the whole of the sample (5.4). Again, Mashreq respondents assess the progress of the implementation in this country slightly more positively than the rest.

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3. Data by national origin of respondents in this section must be considered as merely indicative.
4. While 57.2% of Moroccan exports are targeted to the EU, 59.3% of its imports originate in the EU-27.
5. In fact, the greater scepticism of Jordanian respondents is not surprising if we analyse the evolution of their exports between 1996 and 2006. Exports of non-energy products from Jordan to Europe have only increased by 3.6% in comparison to 25.8% of annual growth of imports to the rest of the world. Moreover, the United States, Iraq and India receive the largest of volume of Jordanian exports, while overall imports of EU-27 products mean a total volume which is practically equivalent to imports of Saudi products alone (2010 data).
In the case of Egypt, the assessment made by Egyptian respondents is more positive (average of 5.8) than that of the total of the sample (5.3) and Mashreq respondents (5.6).

In the case of Algeria, the assessment by Algerians themselves is 2.5. Along with the low assessment of the whole of the sample (4.3), we should add that Maghrebian respondents make the least positive assessment (3.5). These results are not at all surprising. In fact, after five years of application, its trade imbalances have meant the renegotiation of the calendar established for tariff dismantlement.6

In terms of progress in the implementation of the EMFTA in the Occupied Territories, graded with 4.5 on average by Palestinians themselves, whose potential for free trade is obviously limited by the socioeconomic conditionings of the zone, the low assessment of Maghrebian respondents stands out (3.5).

Graph 5: Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries
(Assessment for each partner country. Average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

6. Moreover, the lack of diversification of its export structure is notable: in 2010, 96.5% of Algeria’s total exports to the EU were energy-related. Exports of non-energy products from Algeria to the EU are, therefore, marginal and between 1996 and 2006 they fell by 10.2% annually. In the same period, imports of European products, mainly manufactured products, increased by 10.7% annually.
In data by institutional affiliation, we note a subtle trend for policy-makers to give slightly higher grades than experts and, at the same time, slightly higher than actors from civil society. In terms of area of specialisation, political cooperation and security professionals have a systematically higher average than the other groups.

**The Impact of the EMFTA**

Block C5 – devoted to the specific impact of the EMFTA and the EU-Turkey Customs Union on the economies of the MPCs – was only asked to some of the participants in the Survey. Through a filter question, those who consider that they did not have a clear perception of the implications of the economic integration between the EU and Southern Mediterranean Countries were eliminated. It is striking that only 28% of all respondents answered this block of questions. Given that the sub-sample is reduced to 160 people, any disaggregation must be analysed with the due precaution.

![Bar charts showing data for various regions and groups](image-url)
Graph 6: Knowledge or a clear perception of the impact of the Euro-Mediterranean Free Trade Area and the EU-Turkey Customs Union

(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

The first block of specific questions made reference to the impact of the EMFTA on the MPCs in general and, for the nationals of these countries, on the impact on their own country, in terms of “growth, competitiveness and investment”, “employment”, “SMEs” and “State revenues”.

The results for the total of respondents show how the perception of the greatest impact of the EMFTA is on “growth, competitiveness and Foreign Direct Investment” (6.1 on average, on a scale from 0 to 10, where 0 stands for very negative impact and 10 for very positive) followed by the impact on “local Small- and Medium-Sized Enterprises” (5.8), the impact on “employment” (5.6) and on “State revenues” (5.3). It is important to point out that EU respondents consider the impact of the EMFTA on “economic growth, competitiveness and investment in the MPCs” and on “Small- and Medium-Sized Enterprises” more positive than the MPC respondents themselves.

El impacto social sería bajo ya que las condiciones de empleo no siguen los mismos estándares que en Europa (sueldos bajos, falta de estándares mínimos de seguridad e higiene, ausencia de derechos de los trabajadores, etc.).

Spanish respondent

The economic integration and the EMFTA will enhance the economic sector in the MPCs, which will create jobs and boost the social impact in the long term; no emphasis was made on the SMEs until now.

Egyptian respondent

Les Impact légèrement sont positifs mais limités en raison notamment de la persistance de barrières non tarifaires, de la protection agricole de l’UE, de l’absence de libéralisation des services, etc.

French respondent
As for the impact of the EMFTA according to the national origin of the respondent, the perception of respondents for their own country is always lower than the overall perception of the MPCs in all fields. Mashreq respondents consider that the impact of the EMFTA in terms of "economic growth, competitiveness and FDI", "impact on the enterprises" and "employment" has been higher throughout MPCs than the Mashreq itself. Maghrebian respondents consider, however, that the impact in terms of State revenues has been more negative in their region than in the rest of the MPCs concerned.

**Graph 7: Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of:**

(average on a scale of 0-10, where 0 stands for very negative, and 10 for very positive)

<table>
<thead>
<tr>
<th>Category</th>
<th>Your own country</th>
<th>In the MPCs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact on growth, competitiveness and FDI</td>
<td>5.77</td>
<td>6.07</td>
</tr>
<tr>
<td>Impact on employment and social impact</td>
<td>5.15</td>
<td>5.55</td>
</tr>
<tr>
<td>Impact on local Small- and Medium- Sizes Enterprises</td>
<td>5.15</td>
<td>5.82</td>
</tr>
<tr>
<td>Fiscal impact (impact on State revenues)</td>
<td>5.00</td>
<td>5.30</td>
</tr>
</tbody>
</table>

Source:Compiled by the IEMed based on the results of the 2nd Euromed Survey

**The Impact of the EU-Turkey Customs Union**

The second block repeated the same questions, this time exclusively in reference to the impact of the Customs Union on Turkey. The results of all respondents follow the same pattern as for the EMFTA although with significantly higher grades. The impact on "growth, competitiveness and investment" receives an especially positive assessment (average grade of 7.0). The implications of the Customs Union on “SMEs” (6.6) and "employment" (6.3) as well as on “State revenues” (6.2) are more positively graded.

In relation to the impact on "growth, competitiveness and investment", it is notable that the average assessments of respondents from EU countries (7.2), Turkey (7.1) and Israel (8.0) are slightly above the general average (7.0). In contrast, respondents from the Maghreb and, especially, the Mashreq least positively assess the impact of the Customs Union.

In terms of SMEs, Turkish respondents (6.6) and EU respondents (6.7) assess the implications of the Customs Union equally positively to the overall average (6.6). Significantly, respondents from Turkey express the worst perceptions of the implications of the Customs Union on employment (6.1) and on State revenues (5.9).

**Graph 8: Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy**

(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

<table>
<thead>
<tr>
<th>Category</th>
<th>Your own country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact on growth, competitiveness and FDI</td>
<td>6.96</td>
</tr>
<tr>
<td>Impact on employment and social impact</td>
<td>6.43</td>
</tr>
<tr>
<td>Impact on local Small- and Medium- Sized Enterprises</td>
<td>6.61</td>
</tr>
<tr>
<td>Fiscal impact (impact on State revenues)</td>
<td>6.20</td>
</tr>
</tbody>
</table>

Source:Compiled by the IEMed based on the results of the 2nd Euromed Survey
In relation to the added value of the conclusion of free trade agreements between Turkey and some MPCs, all respondents consider that the signing of these agreements efficiently contributes to the consolidation of the Euro-Mediterranean Free Trade Area (overall average of 6.6). The assessment is higher among respondents from Turkey (7.3), the Maghreb (7) and the Mashreq (6.8) than among those from the EU (6.4).

Graph 9: To what extent the bilateral free trade agreements concluded between Turkey and the MPCs contribute to the establishment of the Euro-Mediterranean Free Trade Area
(average on a scale of 0-10, where 0 stands for no contribution, and 10 for very positive contribution)

These effects are rather long-term effects. In the short term the Customs Union had rather negative effects on small- and medium-sized enterprises as well as on employment.

Austrian respondent

Il suffit de comparer l’attractivité des investissements en Turquie avec l’Egypte pour comprendre les effets positifs de l’Union Douanière.

Belgian respondent

La Turquie dispose d’une capacité de production agricole et industrielle qui la rend capable d’absorber les bienfaits de la zone du libre échange.

Algerian respondent

Without this form of South-South integration, the EMFTA will be totally unbalanced.

Irish respondent

South-South Integration and System of Pan-Euro-Mediterranean Rules of Origin

In relation to South-South integration, the question (Q C.6) is dedicated to the assessment of progress in the implementation of the Agadir Agreement, the Greater Arab Free Trade Area (hereafter GAFTA) and the Arab Maghreb Union (AMU).

7. According to the World Trade Organization, to date, Turkey has concluded free trade agreements with the following countries of the Mediterranean regions: Albania (in force since 2008), Bosnia and Herzegovina (in force since 2003), Croatia (in force since 2003), Egypt (in force since 2007), Israel (in force since 1997), Jordan (in force since 2011), Montenegro (in force since 2010), Morocco (in force since 2006), Palestinian Authority (in force since 2005), Syria (in force since 2007), and Tunisia (in force since 2005).

8. Agadir Agreement (entry into force: 2006; current signatories: Algeria, Bahrain, Egypt, Iraq, Jordan, Saudi Arabia, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Sudan, Syria, the Palestinian Authority, Tunisia, United Arab Emirates and Yemen); Arab Maghreb Union (entry into force: pending ratification; current signatories: Algeria, Libya, Morocco, Mauritania and Tunisia).
The first notable aspect is that, in contrast to the North-South integration initiatives, none of the initiatives has received an assessment above 5. This is not surprising, if we bear in mind that the Southern Mediterranean continues to be the region of the world with one of the lowest rates of regional integration (only 5.7% of total trade). Only the Agadir Agreement has an average close to 5 (4.7). Meanwhile, the GAFTA and the AMU are manifestly more negatively assessed (average grades between 4.2 and 3.6, respectively).

Graph 10: Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

The Agadir Agreement is the most positively assessed of the three initiatives and its assessment has few differences between regions. The GAFTA has a lower general assessment and significant differences between respondents from southern and Eastern Mediterranean Countries: respondents from the Mashreq grade its implementation a little more positively than most respondents; in contrast, Maghrebian respondents make the lowest average assessment (3.6 on average and 35% of respondents that grade it between 0 and 2). This trend worsens with the results of the AMU — the least positively assessed of the three. The results of respondents from the Maghreb, the most affected by the lack of ratification of the “Declaration establishing an Arab Maghreb Free Trade Area”, are extremely low (average grade is only 2.6, partial result of the 40% of respondents who grade the progress between 0 and 1).

Graph 11: Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: Agadir Agreement (2007, Morocco, Tunisia, Egypt and Jordan)
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean:

**General Arab Free Trade Agreement (League of Arab States)**

(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

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Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean:

**Arab Maghreb Union**

(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
Southern countries have nothing they would like to trade with. No technology, no consen-
sus, no will and no clear objectives. They do not know what governance is.
Moroccan respondent

A part l’accord d’Agadir, établi à partir d’un examen d’une situation objective et qui pourrait
se développer, les accords découlant d’institutions n’ont vraiment pas d’avenir, surtout pas
entre les pays arabes rongés par les conflits politiques.
Tunisian respondent

Siempre es mejor que estos acuerdos existan pues ello fomenta el diálogo entre los países
participantes y se limitan los peligros de enfrentamientos.
Spanish respondent

Creating more awareness is needed.
Egyptian respondent

The analysis both by institutional affiliation and by areas of specialisation reveals similar trends
in the assessment of the three initiatives. On the one hand, experts assess more negatively
the progress in terms of South-South trade integration than the other two categories. On the
other, “political cooperation and security” professionals assess the three initiatives more nega-
tively than those in the socio-cultural area. The “economic and financial cooperation” profes-
sionals (more familiar with the issue) express an intermediate position.

II. The System of Pan-Euro-Mediterranean Rules of Origin

The question about rules of origin was asked only to respondents who declared themselves
to be familiar with the subject (19.1% of respondents). The question referred to the reasons
why that the System of Pan-Euro-Mediterranean Rules of Origin is used so little. Of the five
reasons proposed, respondents had to choose the two they considered most important. For
respondents as a whole, the two most important reasons are the “lack of knowledge by trade
operators” (56.6%) and the fact that “it is an overly complex system” (54.0%). The other rea-
sons are that “the current system is not well adapted and developed” (32.7%), the “lack of
compatibility with other systems of rules of origin” (30.1%) and the fact that the “administra-
tive costs of applying the Pan-Euro-Mediterranean rules of origin are too high” (26.3%).

9. The pan-Euro-Mediterranean system of cumulation of origin is made up of a multiplicity of agreements, setting out, i.e. free trade
provisions based on a network of identical rules of origin allowing for diagonal cumulation, among the countries of the zone. This
cumulation zone is bound to grow in the future. At present, the pan-Euro-Mediterranean cumulation zone includes the European Un-
on, the EFTA States (Iceland, Norway, Switzerland, Liechtenstein), the participants in the Barcelona Process (Algeria, Egypt, Israel,
Jordan, Lebanon, Morocco, Syria, Tunisia, Turkey, Palestine) and the Faroe Islands. (European Commission; COM(2010)168 final).
Graph 12: How would you explain the low use of the System of Pan-Euro-Mediterranean Rules of Origin? (% chosen as first option)

From the analysis by geographical origin of respondents, it is important to note that in the case of the Maghreb, together with the fact that “it is an overly complex system” and the “lack of knowledge by trade operators”, both the fact that “the current system is not well adapted and developed” and the “lack of compatibility with other systems of rules of origin” are considered important reasons (39.3% of respondents mention them).

Among respondents from the Mashreq, the view that “it is an overly complex system” is seen as primordial. Also notable is the importance given to the fact that the “administrative costs of applying the Pan-Euro-Mediterranean rules of origin are too high” (42.3% of respondents from the Mashreq consider that it is one of the two greatest impediments to the use of the Pan-European System of Rules of Origin). For both Mediterranean and non-Mediterranean EU respondents, the “lack of knowledge by trade operators” is the main determinant in assessing its lack of use (respectively, 63.6% and 66.7% of respondents from the European Union point it out). However, the second most cited reason differs between Mediterranean and non-Mediterranean EU countries. While for respondents from Mediterranean countries the second most important reason is that “it is an overly complex system”, respondents from the non-Mediterranean EU consider the fact that the “the current system is not well adapted and developed”, more than the complexity, is responsible for its scarce use.

Il ne faut pas surestimer cette question et son effet sur les économies méditerranéennes.
French respondent

La première raison me semble être le manque d’intégration des économies concernées.
Moroccan respondent

The main problem is trade regulation and quality of products.
Moroccan respondent

At a global level, with the exception of professionals of migratory affairs and justice, it is considered that the “lack of knowledge by trade operators” and the fact that “it is an overly complex system” are the main impediments to the exhaustive application of the system.
For policy-makers, the fact that “it is an overly complex system” is the main reason, more than any other, for the low use of Pan-Euro-Mediterranean rules of origin. However, for both experts and actors from civil society the “lack of knowledge by trade operators” is the reason obstructing its application (57.9% of experts and 69.0% of actors from civil society – including business people – cite this reason).

**Liberalisation of Trade in Services**

The assessment of the progress of negotiations for the trade in services liberalisation between the EU and Morocco, Tunisia, Egypt and Israel in the framework of the ENP is around 5.0. The average assessments by respondents of the EU (5.4), Turkey (5.6) and Israel (5.7) are slightly higher than the assessments of respondents from the Maghreb (5.0) and the Mashreq (4.9).

The difference in assessments could be in the divergence of interests between the northern and southern Mediterranean. While the EU has a comparative advantage in modes 1 (cross-border supply) and 3 (trade presence) of General Agreement on Trade in Services (GATS), the MPCs have interests in the liberalisation of modes 2 (consumption abroad) and 4 (presence of natural persons). The European Member States are reticent about making concessions in mode 4 which, in its turn, prevents the MPCs from granting the right of establishment to European service providers. Consequently, progress is difficult.

*It has the chance of going slightly more rapidly than WTO trade in services liberalisation, but don’t expect any great progress.*

*Egyptian respondent*

*C’est exactement la même situation qu’à Doha. Pourquoi t-on considère les services mais on ne considère pas les produits agricoles?*

*Algerian respondent*

*La India carece de acuerdos semejantes y se ha convertido en el hub mundial de deslocalización de servicios.*

*Spanish respondent*

The assessment by respondents from the countries with which these negotiations are carried out (Egypt, Israel, Tunisia and Morocco) shows that only respondents from Israel and Morocco positively assess the progress of the negotiations.

Another important point is the level of lack of knowledge about the issue exemplified by the 36% of “Don’t know” answers.

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10. It is important to note that this category includes business people.
III. The Impact of Agricultural Liberalisation

This question (Q C.9) introduces one of the most sensitive issues in the debate on the EMFTA: agricultural liberalisation. The assessment as a whole is not positive although not especially negative. (The average is around 4.8 and almost 50% of respondents grade it between 4 and 6.)

By geographical origin, respondents from the Maghreb give the lowest regional average grade, although not greatly different from the whole (4.5 on average). This circumstance is repeated in the analysis by institutional affiliation (the lowest grade – also 4.5 – is given by experts) and by area of professional specialisation (4.5 is also the lowest average and corresponds to professionals in the economic area).

Graph 14: Assessment of the progress in trade liberalisation of agriculture and processed agricultural products in the Euro-Mediterranean framework
(average on a scale of 0–10, where 0 stands for very disappointing, and 10 for very positive)
The protectionism exerted by the EU in the agricultural sector is preventing southern partners from receiving a very important source of income, and it is affecting the internal social security.

Lebanese respondent

Les européens ne prônent le libre échange que quand cela les arrange (produits industriels). Néanmoins, ils trouvent d’autres arguments quand il s’agit de produits agricoles ou ils n’ont pas d’avantage comparative.

Algerian respondent

Hay que confiar en que el acuerdo agrícola en el GATT-OMC que nos acerca la supresión de las subvenciones y la próxima reforma de la PAC ayuden.

Spanish respondent

**Liberalisation of Trade in Agricultural Products**

In addition to a general approach to the issue, the Survey included a series of more specific questions about agricultural liberalisation aimed at those respondents who considered that they had a good knowledge of the issue (25.3% of respondents).

In the first place, they were asked about the impact of agricultural liberalisation on the EU Member States and the MPCs. In the case of the MPCs, based on two assumptions: one of full bilateral liberalisation and the second in the case of unilateral asymmetric liberalisation by the EU.

For all respondents, the impact would be more positive for the MPCs (6.1 average in both assumptions) than for the EU (5.7). However, these results have variations according to origin of respondents.

**Graph 15: Assessment of the potential impact of full agricultural liberalisation on the EU Member States and MPC agricultural sectors**

(average on a scale of 0-10, where 0 stands for very negative impact, and 10 for very positive impact)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
EU respondents consider that the impact on the EU will be significantly more negative (5.2) and slightly more positive on the MPCs (6.2). However, within this group, there are significant differences between respondents from Mediterranean EU countries and those from the rest of the EU.

Respondents from non-Mediterranean EU countries give the most extreme grades both for the impact of liberalisation in the EU (the group that grades most negatively, 4.9) and the MPCs, especially full liberalisation (6.4).

In contrast, grades by respondents from Mediterranean Europe are closest to the overall average (average of 5.4 for the EU, 6.1 for MPCs assuming a total and reciprocal liberalisation, and 6.2 assuming a unilateral liberalisation by the EU).

Among MPC respondents, who make practically the same overall assessment of the three scenarios (6.1, 6.0 and 6.0), there are also important differences between them. For Mashreq respondents, agricultural liberalisation will be positive both for the EU (6.2) and the MPCs, and especially for the MPCs in the case of a full bilateral liberalisation (6.9 on average). Meanwhile, for respondents from the Maghreb the trend is the opposite: the liberalisation would be more positive for the EU than for the SMEs (the average impact declared is 6.2 in the first case and below 6 in the other two). Specifically, respondents from the Maghreb consider that unilateral liberalisation will have more positive effects than full bilateral liberalisation (respective averages of 5.8 and 5.2).

Es necesario un proceso de adaptación de las zonas agrícolas de la UE que competirían con las de los PAM para evitar un colapso de sus producciones (zonas mediterráneas de la UE, especialmente de España e Italia).

Spanish respondent

Je pense que la situation n’est pas encore claire au sein de l’UE (système de subventions et accrochages fréquents avec les agriculteurs); donc, je vois mal l’apport d’une prochaine libéralisation.

Tunisian respondent

The common agricultural policy guarantees best prices for EU agriculture products which causes distortion in the agricultural products markets. Full liberalisation will guarantee lower prices in both shores, and better quality of agricultural commodities.

Egyptian respondent

The block of questions on agricultural liberalisation closes with a question about the probabilities that, in the future, the EU will offer MPCs an agreement to enter the single market without barriers. None of the respondents are very optimistic (4.6 on average). Turkish and EU respondents – especially those of non-Mediterranean countries – are the most sceptical (the average probability is 4 for the first two categories and 3.7 for the other one): the most optimistic (whose predictions do not differ much from the average) are respondents from the Maghreb.
Graph 16: Probability of the EU offering to the Mediterranean Partner Countries anytime in the foreseeable future a full agricultural trade liberalisation to access the single market free of any barrier (average on a scale of 0-10, where 0 stands for no probability, and 10 for very high probability)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

New Deep and Comprehensive Free Trade Areas

All respondents were asked about the new “Deep and Comprehensive Free Trade Areas” which are planned to be established with the MPCs. The overall results indicate that these kinds of areas are considered to have high added value. This positive assessment is reproduced homogeneously if data is disaggregated by regions. In terms of institutional affiliation and area of specialisation, the high assessments given by policy-makers and “economic and financial cooperation” professionals stand out.

Graph 17: Assessment of the added value of the new Deep and Comprehensive Free Trade Areas to be established by the EU with the Mediterranean Partner Countries (average on a scale of 0-10, where 0 stands for no added value, and 10 for very high added value)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
Financial Cooperation Assessment

The final two questions in this section of the Survey refer to financial cooperation. First, there are questions about the effectiveness of bilateral assistance through the ENPI. Respondents considered it slightly effective (5.7 on average and 40% of responses between 6 and 7). The great differences of opinion have their origin in the divergent assessment of the ENPI among MPC respondents. While respondents from the Mashreq make the most positive assessment of the effectiveness of the ENPI (6.3 on average and 61% of responses between 6 and 8) those from the Maghreb make the most negative assessment (5.2 on average and 47% of responses between 3 and 5).

Graph 18: Assessment of the effectiveness of the bilateral assistance granted through the European Neighbourhood and Partnership Instrument
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

The ENPI is a good tool, but deserves to be more results and target oriented.

Lebanese respondent

Too much is spent on traditional projects focusing on technical public sector reform that have marginal positive effects but not on core governance questions that would really change the fundamental political dynamics for the better, simply because the last thing Europe wants is political instability in the Mediterranean.

Swedish respondent

La question du respect des droits humains posée comme une exigence pour l’IEVA n’a aucune validité puisque certains pays qui portent atteinte flagrante à ces droits humains ont signé cet instrument. Il y a plusieurs exemples, dont la Tunisie.

Algerian respondent

Tant que la FEMIP n’a pas été transformée en Banque Euro-Méditerranéenne, cette assistance reste au-delà des attentes des pays du voisinage. Les montants alloués au Partenariat sont dérisoires”

Tunisian respondent
Effectiveness of Direct Budget Support

The last question is about how respondents would assess the effectiveness of direct budget support as a financial aid mechanism for the MPCs. As a whole, the assessment is slightly lower than the ENPI of the previous question (5.4). Curiously, there are practically no differences between the assessment of direct support or the use of the ENPI between respondents from the Maghreb, the Mashreq or the Mediterranean EU. However, respondents from the rest of the EU consider that direct budget support is far less effective than the ENPI (the average reduces from 5.7 in the case of the ENPI to 4.6 in the case of direct budget support). The decrease in the assessment by these respondents explains almost all the differences between the assessments of the mechanisms.

**Graph 19: Assessment of the effectiveness of direct budget support as a mechanism for EU financial aid to Mediterranean Partner Countries**

(average on a scale of 0-10, where 0 stands for very ineffective, and 10 for very effective)

Budget support relates to trust; so it could become an important mechanism if effectively allowed as a trustworthy mechanism for financial aid to the Mediterranean Partners.

German respondent

Direct budget support is an effective support mechanism but for dictatorships, which is what most of the countries in the southern Mediterranean are.

Egyptian respondent

Il faut d’abord soigner la gouvernance et améliorer les compétences (la ressource humaine).

Algerian respondent

Do not aim to create a subsidy culture. It encourages dependency. Rather teach self-sufficiency.

Dutch respondent
SECTORAL COOPERATION
Sectoral Cooperation in the Framework of the EMP

The main common characteristic of block D, exclusively devoted to sectoral cooperation, is the unequal distribution of the response rate. The specificity of the questions on the sectoral plans developed has significantly reduced the non-response rate for those plans with lower political, social and media visibility.

The questionnaire included both general questions aimed at all respondents and filter questions solely aimed at those participants who said they have good knowledge or a clear perception of the issues.

In relation to the questions on sectoral cooperation aimed at all respondents, the response rate is variable, according to the sector. Thus, cooperation in the water sector and environmental cooperation have low levels of “Don’t know” answers, while for the industrial and energy sectors these percentages are around 50%.

Graph 1: % of answer to general questions on sectoral cooperation in the Mediterranean

![Graph showing the percentage of answers to general questions on sectoral cooperation in the Mediterranean.](image)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

It is important to point out that, in relation to questions aimed at experts who have knowledge of each of the issues approached, the percentage of respondents who say they have enough knowledge to assess cooperation in a specific sector in detail is around 30% of total respondents.
Graph 2: Filter questions: Knowledge or clear perception of sectoral cooperation in the Mediterranean %

I. Industrial Cooperation: Industrial Modernisation Programmes

Based on the analysis of the results of the whole sample, it is worth noting that the progress of the 2009-2010 Working Programme on Euro-Mediterranean Industrial Cooperation has been assessed by 59% of respondents. Among the answers obtained, 49% says that there has been no progress, 7% considers that there has been regression and 44% of respondents consider there has been some progress. Their potential contribution to the achievement of the general objectives of the Euro-Mediterranean Partnership reaches an average of 7.43 (and the answers which attach high importance to them − between 8 and 10 − account for 53% of respondents).

The progress made in three of the priority action lines of the Working Programme 2009-2010 adopted in the 7th Ministerial Meeting on Industrial Cooperation (Nice, 5th and 6th November 2008) has a relatively homogenous assessment.

More than 50% of the answers indicate that there has been progress in “improving the business environment”, “facilitation of the trade of industrial products” and “promoting industrial sustainable development and energy efficiency”. However, it is worth noting that 45% of respondents do not see any progress. The percentage of answers indicating that there has been regression is irrelevant.

Higher allocations are needed to support this area. Mediterranean Partner Countries are interested in promoting sustainable enterprise development and, as services and industry are interlinked, an innovative cluster approach is required.

Jordan respondent

La crise financière mondiale a porté un coup dur à ces initiatives (pour ne pas dire à ces intentions).

Algerian respondent

Multiples initiatives et rencontres d’avenir industriel des PPM se dessinent mais peu de transfert de connaissance et beaucoup de clé sur porte.

Belgian respondent
Progress both in terms of “promoting innovation and technology transfer” and strengthening “dialogue on the future of the textile and clothing sector” receive less positive grades. In both cases, a notable percentage of respondents consider that there has been no progress in these areas or even that there has been regression (57.2% and 60.8% of respondents, respectively).

Graph 3: Assessment of the progress in Euro-Mediterranean industrial cooperation in the five priority axes highlighted in the 2009-2010 Working Plan

(average on a scale of 0-10, where 0 stands for very ineffective, and 10 for very effective)

The analysis according to geographical origin indicates that, generally, MPC respondents have a wider knowledge of these programmes than EU respondents.

While more than 80% of Maghrebian respondents adopt a position in relation to the different priorities on industrial cooperation, in non-Mediterranean EU countries this percentage is around 40%. Notable in the analysis by area of specialisation of respondent is the advanced level of knowledge of “economic and financial cooperation” professionals (whose rate of answer exceeds 70% in all cases).

The assessment of the different programmes by geographical origin of respondents follows, without significant differences, the general patterns of all respondents. However, there is a more negative assessment by the Maghreb and the Mashreq group (who, in their turn, have a better knowledge of the progress in each of the five axes). This slightly more negative assessment worsens in relation to the progress in “dialogue on the future of the textile and clothing sector”: 20% of respondents from the Maghreb and 16% from the Mashreq consider that not only has there been no progress but there has also been regression.

The assessment of the progress in the five priority axes as they appear in the Working Programme 2009-2010 is completed with a filter question designed to select those respondents with a clear perspective of industrial cooperation and investments in the Mediterranean. It is notable that 30.1% of respondents say they have enough knowledge to tackle the specific questions on these issues. In this respect, the proportion of MPC respondents that say they have a good knowledge of these programmes exceeds by almost 15 percentage points similar respondents.

1. Note that, although respondents are experts with a good knowledge of the issue, they only represent around 30% of total participants. Any break-up of the data – whether by regional, national, institutional or professional origin – must be considered with caution given the decrease in the representativeness derived from the reduction of the sample base.
from the European Union (37% of MPC respondents vs. 22% of European respondents). In the case of respondents from the Maghreb and the “economic and financial cooperation” professionals, the percentages are 48% of positive answers in the first case and 46% in the second. Once again, non-Mediterranean EU countries have the least knowledge (15%).

In the assessment of the Invest in Med network, the grade is slightly more positive (5.4 on average) given that 50% of grades are above 6. From the analysis by geographical origin of respondents, it is notable that, at a regional level, MPC respondents together with the non-EU Europeans give grades below the average. The difference between respondents from the Maghreb and Mashreq is also revealing insofar as they are the countries in both regions that directly benefit from the programme. In this respect, Maghreb respondents make the least positive average assessment (4.7) and those from the Mashreq, the most positive (5.8). Thus, while in Morocco, Tunisia and Algeria the average assessments oscillate around 4.6, all the countries of the Mashreq give grades above 5.5 and in three countries – Syria, Palestine and Lebanon – the grades are even above 6.

Despite the programme started in 2008, the progress that was achieved has not resulted in more than publications and holding seminars and conferences.

Egyptian respondent

Le programme est encore dans ses débuts et il ne promet pas pour le moment, faute de lignes de crédits suffisantes pour qu’il soit à l’hauteur des ambitions des partenaires.

Tunisian respondent

Las multinacionales han hecho más que el programa Invest in Med que tiene unos recursos demasiado modestos.

Spanish respondent

Les investissements ont connu un bond au cours des cinq dernières années. Les bonnes pratiques sont partagées, les partenariats se multiplient et les rencontres dans des clubs spécialisés ont été fructueuses.

Belgium respondent

Also within this block of specific questions, the efficiency and impact of the industrial modernisation programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs are assessed positively.

Out of the four national plans implemented between 1995 and 2006, Tunisia’s is considered the most efficient and has made the most impact (5.9 on average, in which 0 stands for poor efficiency and 10 for a very high level of efficiency) followed by Jordan (5.7), Egypt (5.2) and Lebanon (5.1). The analysis by geographical origin of respondents reveals that average assessments of those from the Mashreq are more positive than those from the Maghreb. Lastly, it is notable that, although it was a specific question aimed only at those with knowledge of the issue, around 25% of these experts were not able to assess the impact of the different national plans.


3. See note 1 (pag. 75)

4. Industrial modernisation (mise à niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs. Budget: Egypt (€250 million), Tunisia (€50 million), Jordan (EJADA, €40 million) and Lebanon (€40 million).
More technical assistance is needed for capacity-building of SMEs to upgrade capabilities and facilitate access to finance.

Egyptian respondent

Cela ne dépend pas uniquement du montant, mais davantage de la structure d’accueil qui gère le projet sur place.

Moroccan respondent

These programmes should be continuously repeated and build upon lessons learnt, to reinforce gains made up to 2006.

Jordan respondent

II. Water Sector Cooperation: the Mediterranean Water Strategy

In keeping with the data for the total sample, cooperation in the water sector is not only the most clearly perceived (lower non-response rate) but is also considered of vital importance for the achievement of the Euromed objectives. As previously mentioned, respondents consider that, of all sectoral strategies and action plans, the Mediterranean Water Strategy has the greatest potential to contribute to the Euromed objectives. However, it must also be remembered that the assessment of its progress, in keeping with the lack of approval of the strategy, is negative: 55% of respondents indicate that there has been no progress in this field and 13% even consider that there has been regression.

In general, respondents consider that the priority given to cooperation in the water sector in the framework of the EMP is high (average 6.7, where 0 stands for low priority and 10 a very high priority). The analysis by geographical origin reveals that both EU respondents and those from the Mashreq consider that the degree of priority given to EMP water cooperation is higher for the remaining geographical categories (the average grades are 7 and 6.9 respectively; while in the Maghreb this grade barely reaches 5.8).

The differences between respondents from the Maghreb and the Mashreq are probably highly conditioned by the geopolitical and climate particularities of the member countries. While in Mashreq countries, water dependency is a geopolitical problem of primordial importance (danger of interstate conflicts resulting from interstate distribution of common hydrographical basins), in Maghreb countries the problem has an environmental and climate nature (risk of droughts and seasonal hydric stress).

In terms of the assessment of the degree of relevance of each priority for projects in the water sector identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008), all the priorities are considered very important (they receive grades above 7 on average). However, there is certain precedence in the order of priorities. Fostering “technologies and efficient use of water” is considered the most important line of action (7.9 on average), followed by the “conservation and rehabilitation of natural environments” (7.5), “de-pollution of the Mediterranean” (7.4), “balance between (water) supply and demand” (7.3) and “adaptation to the climate change” (7).

It should be noted that EU respondents grade the action priorities almost half a point above the rest. The differential between MPC and EU respondents increases significantly in relation to the prioritisation of “adaptation to the climate change” and “efficient use of water” (in the first of the cases, the differential is half a point and, in the second, 7 tenths). Respondents from the

5. For example, the percentage of water dependency of Syria amounts to 72.4% of total water resources, in Egypt 96.6% and in Jordan 27.2% (Source: FAO Data, 2008).
Maghreb, for each and every one of the priority lines of action, invariably make assessments clearly below the average of all respondents while those from the Mashreq make assessments slightly above the general average in relation to the need for "adaptation to the climate change" and "balance between (water) supply and demand".

The subsequent questions, which expand on the assessment of cooperation in the water sector, were answered by respondents who said they had good knowledge of Euro-Mediterranean cooperation in the water sector (30.8% of all respondents). Respondents from the Maghreb and Mediterranean EU countries claim greater knowledge of the sector (39% and 36.9%, respectively, of respondents from each region).

Thus, the prospects for short-term progress in relation to each of the eight cross-over objectives of the Mediterranean Water Strategy are assessed optimistically in most cases (the average grade for each of the objectives oscillates between 5.5 and 6.8). In general, respondents consider it more feasible that there will be progress in those objectives that do not require an extensive political commitment or a major budget development. Specifically, they consider that there is more probability of progress in "support research in all water aspects, such as desertification and climate change" (6.8) and "citizens’ awareness of the value of water" (6.6) than in any of the other fields.

Predictions about technical objectives are very similar to each other. In order of feasibility, respondents consider that the perspectives for "capacity building of water management" (6.5), "secure comparable water data collection and monitoring" (6.4) and encourage the use of "available instruments, e.g. Best Available Techniques (BATs) and Best Environmental Practices (BEPs) as well as Environmental Impact Assessment (EIA) and Strategic Environmental Assessment (SEA)" (6.3) are positive. However, the objectives requiring greater political commitment in relation to modernisation and reform of national management of resources are considered less feasible. Thus, predictions related to "fair and socially sensitive valuation and cost recovery including tariffs to support operation and maintenance costs and fees collection" (5.8), encouraging "participation of all stakeholders" (5.6) and "integration of policies" do not exceed 6 (5.5).


French respondent

Its current level of priority is significantly below its actual importance. Given that it is also an important part of regional conflicts, the fact that the EMP pretty much ignores the real severe issues — water sharing and occupation — renders the issue almost negligible in importance in comparison to what it has the potential to be.

Egyptian respondent

Ce secteur est aujourd’hui principalement dominé par une approche de privatisation. Or, l’approche la plus juste et la plus durable pour ce bien commun (l’eau) est celle qui se fonde sur un partenariat privé/public.

Moroccan respondent

The analysis by origin of respondents reveals that there is a shared perception of the issues that are less prone to political blockage. However, respondents from Maghreb and the Mashreq countries invariably consider the prospects for short-term progress more positively than EU respondents.
In relation to the assessment of the MEDA WATER project developed between 2003 and 2008, the specialists who answer this question make an average assessment of 6. Once again, analysis by geographical origin of respondents highlights a lower average assessment from the Maghreb (5.64) than the Mashreq (6.88). Moreover, EU countries give homogenous average grades of around six. Bearing in mind that a third of all respondents answered this specific question, the high irregularity between average grades of respondents from countries benefiting from the project stands out. Thus, tentatively, it can be noted that Syrian and Lebanese respondents assess the programme positively (above the average), while, in the extreme opposite, Tunisian respondents grade it below 5.

Respondents also assess progress made in the implementation of the project Sustainable Water Management and De-pollution of the Mediterranean in the framework of the UfM. The average assessment of the new project is significantly lower than its predecessor (MEDA WATER) (average grade of 5.2 in contrast to the 6 for MEDA WATER). Moreover, there are manifest differences in relation to the geographical origin of respondents. EU respondents assess its implementation slightly below the average (4.8) while Mashreq respondents assess it clearly above the average (6.4). The assessment by Maghreblans is in an intermediate point very close to the average of the Survey (5.4). The comparatively elevated average of all respondents from the Mashreq is greatly influenced by the high grades for the projects by Syrian and Lebanese respondents. Again Tunisians, this time along with Israelis, assess the progress below 5.

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Euro-Mediterranean energy cooperation is assessed in the sample based on a question on the progress achieved between July 2009 and July 2010 in the implementation of the three structuring axes of the 2008-2013 Priority Action Plan on energy. Subsequently, those respondents who say they have a good knowledge of the sector assessed both the performance of the four regional projects on energy and the relevance of the project Paving the Way for the Mediterranean Solar Plan.6

In terms of the assessment of the progress made in the implementation of the Priority Action Plan, the high rate of lack of knowledge (almost 50% of respondents were not able to adopt a position in relation to the progress made in the framework of the Limassol Plan) stands out. The prevailing view among those who do answer is that there has been more progress than stagnation in terms of “promoting sustainable development in the sector” and “developing initiatives of common interests in key areas, such as infrastructure extension, investment financing and R&D”. However, in relation to “improving harmonisation and integration of markets and legislation”, 60.4% of respondents say that they have seen no progress and 2.5% considers that there has even been regression.

We must recall that the Priority Action Plan on Energy and the Mediterranean Water Strategy are the two plans whose potential contribution to the achievement of the Euromed objectives is considered more substantial.

The subsequent questions, which further explore cooperation in the energy sector (D.7.1 and D.7.2), were only answered by those respondents who say they have a good knowledge of Euro-Mediterranean cooperation in this sector. The pattern of in-depth knowledge of this sector is similar to the remaining cooperation sectors assessed in the Survey: approximately 35% of all respondents say they have enough knowledge to answer more specific questions in this field. It is worth noting that in this field there are also some significant geographical variations: 50% of respondents are from the Maghreb and 26% from non-Mediterranean EU countries.

Thus, respondents who say they have a clear perspective on energy cooperation consider that the performance of the regional programmes — Electricity market integration, EAMGM II Euro-Mashreq Gas Market Project, MED-EMIP Energy cooperation, and MED-ENEC II - Energy efficiency in construction — is quite positive (the average grade is between 5.7 and 5.9). In terms of the importance of the project Paving the Way for the Mediterranean Solar Plan, the average assessment increases to 7.4.

6. Paving the Way for the Mediterranean Solar Plan. Programme approved by the European Commission in November 2009 (5 million euros) to support the improvement of the framework conditions for the development of renewable energies.
Specifically, the regional programme Electricity market integration\(^7\) receives an overall average grade of 5.8. According to geographical origin,\(^8\) MPC respondents assess its performance slightly more positively (6.1) than those from the EU (5.4). It is significant that the region benefiting from this programme – the Maghreb – grades it slightly less positively than the Mashreq (6 vs. 6.3). Among the countries involved in this project, those by Moroccan respondents stand out, much higher than the overall average (6.75), while respondents from EU countries – and, particularly, non-Mediterranean EU countries – are lower.

The EAMGM II\(^9\) project has an average grade of 5.9. This average is exceeded by respondents from the Mashreq (6.9) and Turkey (6.3) – the main beneficiaries of the project – and by respondents from European countries which are not members of the EU (6.25). In this respect, it is important to note that the average by Maghreb countries is highly influenced by the average grade by Syrian respondents (8.7) and Jordan respondents (5.7). The remaining assessments by respondents from countries benefiting from the project – Egypt and Lebanon – are not so extreme (average grades of 6.8 and 6.9 respectively).

**Graph 5:** Evaluation of the regional energy cooperation projects by beneficiary countries: Electricity market integration
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

![Graph 5](image)

*Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey*

**Graph 6:** Evaluation of the regional energy cooperation projects: EAMGM II – Euro-Arab Mashreq Gas Market Project countries involved
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

![Graph 6](image)

*Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey*

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7. Electricity market integration. Supports the development of an integrated electricity market between Algeria, Morocco and Tunisia and between these three Maghreb countries and the EU, through the harmonisation of their legislative and regulatory framework. Timeframe: 2007-2010. Budget: €4.9 million (MEDA).

8. See note 1. (pag. 75)

The assessment of the MED-EMIP Energy cooperation\(^\text{10}\) project is similar: an average overall grade of 5.8 which, regionally, is exceeded by the average grades both from the Mashreq (6.5) and Turkey (6.2). In terms of assessments by respondents whose countries benefit from the project, it should be noted that Lebanese respondents assess this project more positively (7.4), followed by Egyptian and Moroccan respondents (both with 6.5). Respondents from Tunisia, Algeria and Israel give grades above 5 on average.

The same pattern is observed for the assessment of the energy efficiency project in the construction sector MED-ENEC II.\(^\text{11}\) This project stands out for the distance between the overall average grade of the sample (5.7) and the average corresponding to Mashreq respondents (7.0), which is the highest for the four projects mentioned so far. In fact, four of the nationalities concerned – Syrians, Palestinians, Lebanese and Egyptians – grade it above 7. Again, respondents assessing this project less positively are Algerians (5.5), Tunisians (4.7) and Israelis (4.5).

The last project analysed, Paving the Way for the Mediterranean Solar Plan, whose objective is the improvement of framework conditions for the development of renewable energies, receives far more positive grades than the previous projects. In this case, the average grade is 7.2. This positive average assessment of the programme comes from 72% of answers with grades between 7 and 10. From the analysis by geographical origin of respondents, at EU level the different perception of European citizens from Mediterranean countries (6.5) and the rest of the EU (8.4) stands out. In terms of MPCs, respondents from the Maghreb grade the importance of the programme slightly below the average (7.0) while respondents from the Mashreq see a significantly greater importance (8.4).

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Graph 7: Evaluation of the regional energy cooperation projects by its beneficiary countries: MED-EMIP – Energy cooperation countries involved
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Evaluation of the regional energy cooperation projects by beneficiary countries:
MED-ENEC II – Energy efficiency in construction countries involved
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
### IV. Environmental Cooperation

This section begins with a generic question allowing participants to adopt a position in relation to the added value resulting from tackling the environmental challenges in the Mediterranean at a regional scale (i.e., in the framework of the EMP or the UfM) instead of in the global framework of the UN (e.g., Plan Bleu). In general, respondents consider that its added value is high: 70% grades the added value of regional management with a 7 or above, which raises the overall average to 7.3. The variability of average grades according to the origin of respondents is almost negligible, with the exception of non-EU European respondents (who give the highest average grade – 7.9 –) and Turkish respondents (who give the lowest grade, 6.4).

| EU and Mediterranean countries have closer relationships and interest to develop the region at this stage. |
| Maltese respondent |

| L’UpM connaît mieux les problèmes de ses pays membres mieux que n’importe quelle autre institution. |
| Mauritanian respondent |

| La spécificité et l’urgence des problèmes de l’environnement dans le pourtour méditerranéen sont mieux perçues et ressenties au niveau régional. |
| Moroccan respondent |

| Le Plan Bleu remplit très bien ce rôle. L’efficacité devrait être recherchée à travers les résultats, et pas à travers la multiplication des structures. Impliquer le Plan Bleu, en l’associant aux activités de l’UpM dédiées à la coopération environnementale, serait le meilleur cheminement. |
| French respondent |

| There is an added value but the global framework is important and should not be replaced by regional frameworks. |
| Lebanese respondent |

| Un cadre régional de coopération a plus de chance de réussir qu’un cadre global dilué. |
| Algerian respondent |

The following questions, which further explore the assessment of cooperation in the environmental sector, were only answered by those respondents who said that they have a good knowledge of the issue. In this respect, there is a pattern of knowledge common to the remaining grades for sectoral programmes: around 30% of respondents said they have enough knowledge of this cooperation. In this respect, it is worth noting that, while in the Maghreb 46.6% of respondents are capable of adopting a position in relation to specific issues related to cooperation, this is reduced to 30.6% for respondents from the Mediterranean EU and to a tiny 14.7% in the case of non-Mediterranean EU countries.

Those who know about the state of cooperation assess the progress in terms of reduction of the main pollution sources in the framework of Horizon 2020 and the regional programmes SMAP III and SAFEMED II.

In relation to Horizon 2020, regardless of the source of pollution, most assessments are of “no progress” and “regression”. Considering the three priority action sectors together, only 40% of respondents consider that there has been progress. However, there are variations according to the sector assessed. 48% and 41% of respondents consider that there has been progress in the sectors of waste water and urban waste, respectively. In the sector of industrial emissions, this rate decreases to 35%.
The comparison according to geographical origin of respondents reveals differences between the perceptions of those from the MPCs and EU-27 of up to 10 points.

The maximum differential between the views of the two groups is in the assessment of the industrial emissions in the framework of Horizon 2020. 27.7% of EU respondents and 40.7% of MPC respondents consider that there has been progress.

In terms of improvement of waste water management, we see an inverse situation: the proportion of respondents who consider that there has been progress is higher in the EU (54.7%) than in the MPCs (44.1%).

Finally, the differences in the perception of progress in terms of management of urban waste are generally much lower (around 5 points).

The regional programmes SMAP III − Sustainable environmental development and Maritime SAFEMED II − Maritime safety and pollution prevention receive very close average grades (5.7 and 5.5, respectively).

From the analysis by geographical origin of respondents, it is notable that, in the case of SMAP III the grades of respondents from Mediterranean EU countries (5.5) and from the Maghreb (5.4) are below the average. Again, the initiative is most positively assessed in the Mashreq (6.1). There is a high variation in the assessment of the programmes by respondents from the countries involved: e.g., Turkish, Palestinian and Egyptian respondents grade it above 6, while those from Jordan give it the lowest grade: 4.5.

This pattern is repeated in the assessment of SAFEMED II by beneficiary countries. However, this time the differences according to geographical origin of respondents are closer to the average. Again, respondents from the Mashreq grade the project slightly more positively (5.7) than the general average (5.5). By countries, Turkish respondents give a higher average grade (7.1), followed by Palestinians and Egyptians (both 6.3). Jordanian respondents again give the worst grades (3.0).


14. See note 1 (p. 3).
Graph 9: Assessment of the environmental cooperation regional programmes
(average on a scale of 0–10, where 0 stands for very disappointing, and 10 for very positive)

**a) SMAP III – Sustainable environmental development**

![Bar chart showing assessment of SMAP III]

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

**b) SAFEMED II – Maritime safety and pollution prevention**

![Bar chart showing assessment of SAFEMED II]

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

**V. Food Security**

The assessment of cooperation in food security was based on a question asked to the whole sample about the level of importance attached to ten issues considered key to the development of the next Ministerial Conference on Food Security, Agriculture and Rural Development. Firstly, the degree of knowledge of each of the initiatives stands out. In contrast to previous assessments, the percentage of respondents who were unable to adopt a position was never above 15%.

The inclusion of all the initiatives on the political agenda is considered important (grades around 7 on average). However, respondents give priority to the debate on “sustainable rural development” (7.5), “the articulation between the EU’s Common Agricultural Policy (CAP) and agricultural challenges for the Mediterranean Partner Countries” (7.4) and “public policies for agricultural development” (7.3) above other initiatives considered as secondary (especially “implementing Mediterranean diet education policies”, whose average barely exceeds 6). The remaining priorities can be grouped within those which are closer to the maximum grade – “developing agri-food industries in the Mediterranean” and “activities in the area of sanitary and phytosanitary norms” (average grades around 7.3) –, initiatives graded around 7 – “development and promotion of quality products” (7.0) and “coordination of agricultural research” (7.1) – and, finally, those considered much less urgent – “creating grain stocks for the region” (6.7) and “gradually extending the CAP to Mediterranean Partner Countries” (6.2).
Graph 10: Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development

(average on a scale of 0-10, where 0 stands for very low, and 10 for very high)

La nueva PAC conlleva acuerdos medioambientales muy específicos que deben cumplirse (condicionalidad) para acceder a los apoyos a ciertos productos. Estos aspectos medioambientales de obligado cumplimiento no pueden separarse de la producción agrícola y por tanto, las cuestiones referidas a la extensión de la PAC a los PAM deberían incluir las cláusulas medioambientales.

Spanish respondent

Les budgets alloués aux différents objectifs retenus sont notoirement insuffisants. En outre, la PAC a besoin elle-même d’être fondamentalement reformée.

Moroccan respondent

Une approche globale du développement agricole dans la région est nécessaire, puisqu’on raisonne en termes d’écosystème, mais encore faut-il qu’elle tienne compte des particularités du sud et ne répond pas seulement à une logique de marché. Par exemple la question sur les stocks est complètement eurocentrée, de même que celle sur la diète méditerranéenne.

French respondent

In relation to geographical origin of respondents, it should be noted that the inclusion of all the issues proposed in the Agenda of the Euro-Mediterranean Conference on Food Security, Agriculture and Rural Development\textsuperscript{15} was considered more urgent by MPC respondents than those from EU countries. The analysis also reveals more similar assessments by MPCs and the Mediterranean EU countries (in keeping with the economic and social importance of agriculture for the societies of these regions). Finally, it is notable that the greatest distance between MPC and EU priorities is in the question on “gradually extending the CAP to Mediterranean Partner Countries”. While respondents from the MPCs grade the importance of its inclusion in the debate with 7.32, EU Europeans grade it with 5.7.

\textsuperscript{15} The Conference has been postponed on two occasions and, at time of publication, the date has not been formally announced.
AFTER THE “ARB SPRING”: IS IT TIME FOR THE EURO-MEDITERRANEAN ORDER TO BE RETHUGHT?

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Introduction: Another Political Regression

In spite of their own purposes, the revolts that have been shaking the Arab world since the beginning of 2011 very likely announce the end of an ineffectual political order: the Euro-Mediterranean political order, consolidated since 1995 upon an unspoken fundamental asymmetry.

The Euro-Mediterranean Political “Shock”

The institutional asymmetry that exists between the European Union (EU) and its southern neighbours has been frequently underlined and discussed. Today other asymmetries of a strictly political nature are becoming impossible to deny: a difference in the nature of regimes, incompatibility of political values and practices, the continuing existence in the South of conflicts that are regularly frozen in time and which bring with them, most notably in the case of the “hottest” of them – the Israeli-Palestinian conflict – resurgences of violence between states. Since the setting up of the Union for the Mediterranean (UfM) in 2008, with the aim of strengthening and rebalancing Euro-Mediterranean institutions while promoting a co-ownership, political differences have emerged precisely as a result of concrete cooperation (following a last-ditch attempt on the part of the French conceivers of this highly idealistic project to avoid them). Up to this point, the prevailing bureaucratic wisdom in Brussels for European institutions deemed that the so-considered over-politicization of the process may put an end to cooperation in the Mediterranean. For the first time with the UfM, it was clearly demonstrated that it is actually impossible to intensify cooperation without involving any politics at all: after several months of diplomatic soundings the UfM ship appeared to be foundered, once and for all, on the Israeli-Palestinian rocks. As a result of the intentional blocking of the mechanism by the States in conflict, it was the whole regular social exchange between members of the Euromed system during summits, meetings and working groups – one of the essential legacies of the 1990s – that was itself being called into question. From then on, it has been impossible to hold any follow-up summit of the UfM and barely possible to arrange meetings at a ministerial level.

Among publicly voiced disagreements and the growing introversion of the players concerned – both in the North and South –, the fiction of even minimal agreement on common issues has become increasingly harder to maintain. It was at this point, with the onset of the uprisings in the Arab Mediterranean countries, that the second major political development came into play. These completely escaped the grasp of the European nations, not only during their onsets but also during their later evolutions. With no possible steering from the North, there is no other option than to simply support them. Notwithstanding, Europe no longer knows how to choose from the new political menu now on offer in the South.

The Arab Spring: an Opportunity to Assess and Re-launch the Barcelona Process?
The current upheavals present a unique opportunity to draw up a complete and honest assessment on the deterioration of the Barcelona Process, and move on to something else, because crises at least offer the opportunity for renewal. It is a balance which has for long rested on inertia but also, paradoxically, on excessive goodwill: how to stop the immense Euromed machine, when there is unanimous agreement that, while not exactly productive, it nevertheless constitutes the most comprehensive and sophisticated multilateral working tool available for cooperation in the Mediterranean area. It is by no means easy to give up on the Partnership, knowing it has survived a range of transformations that have not always been improvements, starting out with the European Neighbourhood Policy (ENP) and ending with the UfM.

As can be seen from the Survey carried out by the IEMed, the level of disenchantment of experts, administrations and representatives of civil society involved in Euro-Mediterranean activities is stunning. At the same time, there is some comfort to be found from reading between the lines. The truth remains that the Arab crisis in effect confirms the accuracy of the diagnosis which European countries have made of their Mediterranean partners since 1990: insufficient growth, fuelling growing social tensions, and regimes chronically lacking in legitimacy. The only surprise was that the crises which the Euromed machinery aimed to prevent, or at least contain, erupted suddenly and largely spread, in a spontaneous and extremely violent way. Looking beyond the ongoing accuracy of the diagnosis of risk in the Mediterranean area, the Euro-Mediterranean strategies and work methods have not been rendered entirely useless either. It will be necessary to wait for the political changes on the southern shore to become defined which, by allowing the emergence of more socially responsible interlocutors, will be eventually reveal the full potential of Euro-Mediterranean cooperation.

I. From Political Ineffectiveness to Inability to Act: The Deteriorated Image of Euro-Mediterranean Cooperation

Since 2008 events and the official launch of the UfM, all the parties involved have had a sense of progressive deterioration of the Euro-Mediterranean process. The recent criticism has, nonetheless, been slightly different from that traditionally expressed within the Partnership. Today, at a time when this is absolutely necessary, the blockage of the institutions impedes any exercise in medium-term planning on any subject. Notwithstanding, beyond that matter and more importantly, there is a tangible loss of purpose within the Euro-Mediterranean project.

1.1. A Shared Sense of Increasing Deterioration

The first finding turned up by the IEMed Survey is that of a generalised disenchantment over the outcome of Euro-Mediterranean cooperation. Such disappointment has undoubtedly existed since the early days of the Partnership, and could have been interpreted for long as a version of the capability/expectations gap described by Christopher Hill: expectations with respect to Europe were so great that any European project would be headed for disappointment.\(^3\) In the Mediterranean, the expectation-gap appears to have arisen first and foremost from the mismatch between the task being undertaken and the means made available. Notwithstanding, the maintenance of a certain level of expectations with respect to Europe can be positively considered. Since the Survey exhaustively (assesses the vast majority of the existing European policies towards the Mediterranean, the disappointment that emerged from the results report seems logical.

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Aside from its origin, what exactly is the nature of such disappointment? If one refers back to the ideals initially set out by the Barcelona Conference in November 1995, the Euro-Mediterranean Partnership aimed at the stabilisation of the Mediterranean region by pursuing the intermediary objectives of economic prosperity, political progress and a rapprochement between peoples. However, none of these intermediate objectives has been achieved over the fifteen years of North/South cooperation. As for the overarching aim of stability and security, at the moment this too seems increasingly farther away, as a result of the events of the Arab spring, whose strategic implications cannot – at this time – be estimated.

But it could also be suggested that, as a general principle, in a sort of reflex reaction of resistance, the Partnership has always been contested. Initially, this resistance came mainly from parties from the civil society actors who considered themselves marginalised in the Euro-Mediterranean process. This opposition resulted in the institutionalisation of relations between the European Commission and civil society via the multiplication of civil forums and the creation of the Anna Lindh Foundation and the non-governmental EuroMed platform.

Similarly, certain Mediterranean Partner Countries have always been somewhat critical of European efforts. Aside from Syria, which never really entered into constructive dialogue with the EU, it should be recalled that Algeria, or even Egypt, showed an important scepticism at the time of the ENP was launched. What strikes an observer today is that the popularity of the EuroMed system is declining among all parties concerned and not just those who still seek recognition and/or integration within this very same system. The UfM has even disclosed the ineffectiveness of contributions of those countries, both in the North and on the Southern shore, which up to now have guaranteed the functioning of the system. From now on, all the institutions, including the European institutions themselves (European Commission and Parliament) can join the game of criticism or even self-criticism.

Graph 2: Global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

Graph 3: Global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
1.2. An Escalating Confusion
This multifaceted resistance clearly complicates the search for a new common line to jointly work on as Euro-Mediterranean cooperation now has a poor reputation. The difficulty of meeting aims, public expectations and results has always hindered the European message regarding Euro-Mediterranean cooperation. This difficulty is growing over time, as European efforts become diffused and their exact content becomes increasingly vague. Thus, Euro-Mediterranean cooperation contains within itself the very mechanism of disappointment production: the EU insists on having its say, but has nothing in particular to propose.

Graph 4: Global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

In addition, the UfM’s difficult launching followed by its impractical setting-up have accentuated the perception of European impuissance. From the responses to the IE Med Survey a double paradox is plain to see: those surveyed now know enough about the Euro-Mediterranean institutions to criticise them, but not in enough detail to make them progress. As criticisms are rather more general and intuitive than founded on empirical facts, they have progressively become less constructive. The UfM has added a further dose of confusion to an already complex system. Not only are the limits and the working tools of the European action towards the Mediterranean increasingly hard to define or enumerate, but the French initiative has strongly reactivated competition between Member States to appropriate and manage the Euro-Mediterranean process. In putting itself forward as its leader, France has, at first, irritated a certain number of Member States which normally take an interest in the Mediterranean (Spain, Italy, then Germany). Since the UfM was returned to the fold of European politics, France has continued to act as if the Co-Presidency were hers by right and exempted her from the consensus effort common to all community matters. The traditional mistrust between the European Commission and French national institutions in the Mediterranean arena has thus been clearly exacerbated. From the MPC point of view, the Spanish initiative in re-launching the Euro-Mediterranean agenda in 2010 appears as a doomed attempt to resuscitate a terminally-ill institution, simply to show up French diplomatic incompetence (as has perhaps happened at other times in the past).

5. For a French and European critique on French diplomatic behaviour surrounding the UfM, see Sylvie Goulard (2008), Il faut cultiver notre jardin européen, Le Seuil, Paris, 2008 and Dorothée Schmid, “French ambitions through the Union for the Mediterranean: Changing the name or changing the game?”, Hellenic Studies, 2/17, 2009 pp. 87-84.

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
Aside from this confusion over responsibilities, the aims of Euro-Mediterranean cooperation themselves appear increasingly hard to identify. Should the focus be on the aims and objectives set out within the framework of the UfM, all of which could in practice be classed under the heading of “sustainable development”? Or, should regard be given to the highly political messages being sent out from then on by the states exercising the joint presidency? (i.e. following the example of Nicolas Sarkozy, using this joint presidency to affirm his role at the time of the Gaza crisis in early 2009).

1.3 From Lost Faith to Open Resentment

The feeling of stalemate is now everywhere and shared by all, even exaggeratedly so, and goes beyond what we have traditionally seen (broadly speaking, prior to the launch of the UfM). Today, it is the myth of the Euro-Mediterranean project’s failure that is being constructed. Now, pessimistic perceptions are more spread and less specific than in the past.

Therefore, it is of the utmost importance to take this spreading vision of failure seriously (a vision which Euromed has for long played down). Today we are witnessing a shift in the Euromed belief system. Up to the launch of the UfM, the liberal consensus prevailing in the Mediterranean area was founded on a strong belief in ineluctable progress. Conceived not long after the fall of the Soviet Empire, the Partnership adhered to the late 1990s liberal mantra which by confusing democracy with the market economy, considered that free trade will lead to an automatic redistribution of prosperity and the harmonisation of political values. Fifteen years of laboriously putting in place the economic and financial Partnership have served to demonstrate the inappropriateness of this approach given the regional conditions: subsistence economies which preclude any industrial diversification and appropriation of wealth by élites which, even if they are not reform-minded, they are, nonetheless, ready to avail themselves either directly or indirectly of the financial returns accruing from Euro-Mediterranean cooperation.7

The blind belief in the liberal notion of economic development is no longer pertinent. At a more strictly economic level, it could be said that what we are witnessing today is a reversal of expectations: the Euro-Mediterranean project is no longer convincing nor marketable. Thus, there is a need to find an alternative development model. Whatever the final model will be, the cumulative social and political frustration recorded over all these years must be seriously taken in consideration. Exactly the very same frustration that Europeans, with the complicity of Southern Mediterranean regimes and in order to prevent the system collapse,

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6. Spanish Presidencies generally following French Presidencies some time soon after, allowing open agendas to mature so as to apply the appropriate treatment (French Presidency first semester 1995 / Spanish Presidency in second semester; French Presidency in 2000 / Spanish in 2002; French Presidency in 2008 / Spanish in 2010).

were conscientiously seeking to alleviate. Today the system is about to collapse due to the lack of a valid spokesperson. And, as a political turnaround appears to be taking place in the South, the next interlocutors with the Europeans may become more demanding, if there is no confidence in the EU's capacity to manage common concerns.

II. The Frustration of an Unequal Relationship: Which Euro-Mediterranean Balance should be Adopted in a Context that is Challenging the Traditional International Order?

Since its beginning, the Euro-Mediterranean system has operated on a recurring North/South imbalance. The origin of this imbalance is to be found in several aspects: the EU is richer, better institutionally developed and politically more homogeneous than the Southern Mediterranean region. In addition, the EU is at the origin of the Euro-Mediterranean cooperation structure and accordingly assures its management. This unequal relationship between the EU and its partners has always been criticised and led to a number of attempts to rebalance it.

The political upheavals underway in the Arab world may lead to the end of the era of control in the Mediterranean area and so render the system obsolete once and for all. Either way, this unequal North/South relationship is increasingly rejected within an international context that not only is witnessing the rise in power of the bigger emerging nations but also ready to challenge the established order. How can the European Union – a progressively weaker player in the international arena – continue to unilaterally decide on the very direction of events while coping with partners who are rediscovering their self-confidence?

2.1. The Dissolution of North/South Imbalance through Fragmentation

The sustained fundamental economic and political differential between the North and South of the Mediterranean has always been translated within the Partnership as an institutional inequality, which the latest reforms linked to the UfM did not really manage to overcome. The results of the IEMed Survey show that this inequality continues to cause unease among MPCs participants. They feel systematically disadvantaged in relation to the North, even when this perception of disadvantage serves at times to assign responsibility for the aforementioned failures to the Europeans.

The Euromed institutions broadly speaking assume two different functions: assuring the representation of participants in the Euro-Mediterranean political process and managing the budget headings devoted to North/South cooperation. Co-ownership in the application of these two functions remains an ideal that is hard to put into practice.

For a long time it has been possible to discern a certain superficial equality within the first of these functions. However, this equality does not extend to the Euro-Mediterranean decision-making process. MPC Representation on the Euromed Committee for the Barcelona Process (BP), or in the Euromed Parliamentary Assembly (EMPA), does not confer influence in directing operations, which essentially remains in European states’ hands (as demonstrated by the brutal French appropriation of the BP in 2008). Since the advent of the UfM, this function of representing the political interests of the totality of the members has been renewed and reinforced thanks to the institution of a Joint Euro-Mediterranean Presidency. The IEMed Survey responses show however that, while such a joint presidency has contributed to symbolically and institutionally rebalance the Partnership, its exact role is seen as vague. Moreover, the dual co-presidency is itself analysed as being an unequal tandem; the performance of its French component, while strongly criticised, is nonetheless regarded as more convincing than the Egyptian one.
As for the second function, i.e. the management of the cooperation process, the rebalancing was meant to occur through the establishment of the UfM Secretariat. Expectations were high in respect to the Secretariat, but, so far, it has not succeeded in functioning as it should have. One year after his appointment, Secretary-General Ahmad Massadeh’s resignation in January 2011, – probably linked to the starting of political upheavals – has not served the UfM to surmount its own deadlock. Lacking a credible budget and dominated by stagnated conflicts, the Secretariat has not been trusted with the management of some European Commission cooperation tasks (including neither the selection of cooperation projects nor their implementation).

In sum, another severe blow which openly reveals the lack of a Euro-Mediterranean consensus. Under such conditions, even parity of representation within the institutions – once more manifested through the appointment of a new Secretary-General, this time Moroccan – makes little sense. Disruption is now the rule in a Mediterranean area that is more than ever polarised along multiple axes, where the North/South disjunction is now crumbling from all directions in new mini-crisis, including some among the European states themselves. Intra-European competition – now openly disclosed and encouraged by a divergence of understanding among Member States on their own ability to define the most relevant regional perspectives – substantially complicates the definition of a new regional consensus. The French unilateralism has left behind a trail of serious consequences, legitimising through a fait accompli an outbreak of re-nationalisation of Europeans policies that had been kept in check relatively well up to then by the discipline of community action. Even the creation of the common foreign policy service, an institution symbolising the advancing of a common foreign perspective, clearly inspires doubts in conscious observers. Faced with the disastrous example of European lack of consensus, the fear is that Mediterranean states may not yet feel encouraged to operate through the bilateral channels, relying on European disunity to protect their own national interests.
2.2 Where are the Advances for the South?

Another inequality that causes problems for the Partnership concerns the shortfall in the involvement of civil society in the process of cooperation. This flagrant shortcoming is most spontaneously expressed when it comes to relevant parties that have not been integrated in the state apparatus. Despite the intentions that were initially set out – and regularly reiterated – the UfM has not addressed in any serious way this criticism aimed at the Europeans since the first summit in Barcelona in 1995 – immediately replicated by the parallel Civil Forum and subsequently becoming a regular feature.

This failure to take into account the needs and ideas of civil society is largely the result of authoritarian obstruction by regimes that were the rule in the South. While, in the North, civil society manages to a greater or lesser extent to be part of the decision-making process, at least as the instigator of issues, attempts in the South at political and social dissent have always been reined in at source. Now the failure of states themselves to reach agreement to ensure that Euro-Mediterranean aims are met is the result of an overwhelming political vacuum: the absence of political summits and ministerial conferences since the Gaza crisis reaffirms the idea that the UfM is well and truly dead. As a result, the voice of civil society is becoming increasingly audible. In particular, developments on the political scene to the South have brought to the negotiating table parties that had long been marginalised, coming out of a civil society for long denied any useful participation in affairs. While awaiting the political leaders of tomorrow, the Europeans are concentrating on those who work for change via social networks, and are following the lead of the French Foreign Minister, who recently invited such protagonists to the Arab World Institute to discuss political transitions. He recognised at this event that he had asked his ambassadors “to extend the spectrum of their interlocutors to the full range of protagonists in civil society.”

Some degree of unblocking, then, is underway.

Beyond these on-going occasional contacts with political actors, new and stable relationships will be required, once new, or renewed, governing élites are confirmed. But the growing rejection of a unilaterally imposed European order at least reveals one thing: partner countries once took the Euromed process seriously since they where seeking to become active actors. After fifteen years of learning experience, administrations and citizens are generally better informed and more motivated towards a greater involvement. Available data suggests that, for a comparable demographic profile, the degree of information nowadays possessed by civil society and institutions in the North and the South is converging, thus creating the necessary basis to make more equitable institutions function in the future in a more satisfactory way.

Once the existence of new and probably highly motivated actors has been acknowledged as has the effective recovery of the expertise achived over the years, the question that will inevitably arise is about the capacity of partner countries to agree on redefining, beyond rhetoric, common objectives for the region. Europe is in crisis; a crisis certainly less spectacular than the Arab upheavals, but it could nevertheless lead to a withdrawal towards its traditional spheres of influence. In the South, the future will tell whether the wave of change invading political systems can learnt to a new common awareness of the issues involved. It is not impossible that the long-awaited opening may finally be happening within states that are often kept in an artificial atmosphere of antagonism by regimes protecting their privileges, and who use fear of the neighbour as a means of baffenting down the domestic political scene. The involvement of the diasporas existing in Europe, of which a number of representatives have been returning to their country of origin to take part in the construction of a new political

8. Civil society is still one of the priorities of the new Secretary-General, Youssef Amrani : “Un diplomate marocain nommé secrétaire général de l’UPM”, LEMONDE.FR with AFP, 25th May 2011.
10. Alain Juppé added: “For too long, we have knowingly or unknowingly been a bit too limited in our contacts, confined to the powers that be, if I can put it like that”; Arab spring symposium, closing speech by Secretary of State Alain Juppé, Minister of Foreign and European Affairs, to the Arab World Institute, Paris, 16th April 2011; at http://www.diplomatie.gouv.fr/.
order, could thus play an important role in undoing political superstitions and helping to consolidate a new relationship of confidence with Europe. The new regimes, born out of parallel dissident movements with broadly similar roots, would be able to enter into a new dynamic of dialogue, and unify their efforts to produce a discourse on a regional scale, faced with a scarcely effective Europe that is increasingly declining to assume responsibilities on the foreign affairs agenda. Nevertheless, the new Arab governments will not have that much room for manoeuvre, given the economic urgency.

III. Going into Action… and its Consequences

The shared diagnosis among a great majority of analysts is that the Arab revolutions took everyone by surprise. Accustomed to reasoning within a framework of authoritarian stability, European experts regularly used to agree that all the conditions for an eruption were there but, for some unknown reason, it had not happened, and most likely never would.

The start of the violent events that are shaking the Arab world seems to be driven by despair and courage, which generates a strong shockwave for the Europeans, since it demonstrates that the unjust socio-economic order imposed until now by increasingly illegitimate regimes was simply untenable. The reaction of Arab populations could, for the first time since their independence, give rise to similarly inspired, copycat unrest in a European Union which is itself facing a major crisis of solidarity, in its response to the failure of its own southern economies. Whatever the reason, what is required for now to prevent the Arab political revolutions from running out of steam is to ensure that change takes root by forestalling the looming economic catastrophe.

3.1. The Core of Arab Dissent: Economic Priorities Confirmed

Since the Barcelona Process was launched in 1995, the EU gave priority to the economy as the driving force for change in the Mediterranean. While the relevance of the Europeans’ incomplete liberal methodology has been challenged even by economists,11 the central role of the economy remains today the appropriate starting point for a strategy of action, most especially for an European power struggling to produce an exportable political model. This option seems even more relevant these days given that the current revolutions were sparked off by a discontent precisely of socio-economic origin, even if their consequences are eminently political.

Economic inequality, lack of social justice and a failing representation: these are the three combined causes to be found behind the Arab revolts in the Southern Mediterranean. But the immediate trigger for the movement is to be found first and foremost in the shape of economic and social inequalities. The sacrificial death of the young Mohammed Bouazizi in Tunisia on 4th January 2011 constitutes the historical starting point of the political tidal wave which hit North Africa first. This young graduate set fire to himself in public as a highly radical protest against unemployment in his country; this act of despair struck the imaginations of Europeans in a special way, more used, as they are, to immolations with a political message. In its execution, this immolation effectively has brought with it a widespread political movement, leading to the dismissal/dismantlement of the Tunisian regime, followed by its Egyptian neighbour.

The chain of events casts a light on the extreme overlap between political and economical control in Southern Mediterranean Countries, where the authoritarian closure acts together with a mechanism of systematic robbery of national wealth. While speculation on the amount and location of the deposed Egyptian president’s fortune is progressing at a fine old rate, it

is useful to recall the background analyses produced by some political economists since the year 2000, who noted the remarkable ability of certain Arab élites in appropriating the benefits of economic reforms required by Europe: with family privatisations and misappropriation of financial cooperation, the élites in power were steadily able to consolidate their hold over their countries’ economies. With growth coming from a subsistence economy with unequal distribution of wealth and demographic pressure, the socio-economic backdrop for authoritarian regimes placed them in constant danger, thus obliging them to ever more repressive practices to repress a social backlash that continually threatened them.

If the European choice of economic cooperation is therefore appropriate and inevitable, it will still be necessary to handle this in a credible way. The basic parameters for European action remain the same: long-term working, organising Partnerships for progress while emphasising partners’ fundamental infrastructure requirements. But from now on assistance needs to be focused on setting up a more equitable and redistributive economic system. Sustainable development requires joining the management of the territory and social justice. In addition, the EU must necessarily be at the forefront in organising an urgent pool of aid that joins together bilateral and multilateral funding providers during the stabilisation period for the new political teams in the South. So the EU would be acting from its core competences.

3.2. An Opportunity to Overcome the Political Roadblock? Impasse…
Since its foundation, the Euro-Mediterranean Process has run up against two political obstacles: conflicts in the Mediterranean area, on the one hand, and the nature of regimes prevailing in the Southern Mediterranean, on the other. As previously mentioned, facing these political difficulties, the Europeans have adopted automatically a strategy of avoiding confrontation: it was a matter of working outside the political arena, confining problems so as to avoid a negative contaminating effect that could be set off by the slightest event. In attempting to avoid all political issues, in the end the EU ran the risk of allowing them to fester. The EU is still today unable to influence as a collective actor in the development of Mediterranean conflicts – thus, the individual Member States can be left to assume the responsibilities they choose for themselves – the democratic question is wide open.

Ambitions for political progress cherished by the EU in the Mediterranean area, theoretically in place since the Barcelona Declaration, have long been reduced to a minimum: political conditionality that has remained ignored and a system of bilateral negotiation with each partner country that has probably contributed to consolidating authoritarian regimes, rather than shaking them up. The question of the nature of regimes thus remained purely rhetorical within the Partnership at least until the US intervention in Iraq, which forced a debate in a brutal and ineffective way over the road to democracy in the Middle East, without leading to a credible aggiornamento of European orthodoxy. If the Neighbourhood Policy theoretically introduced the possibility of strengthened conditionality, it is thus held hostage to an enforced bilateralism that has resulted in neutralising any reforming pretension on the part of the Europeans. Besides, the Mediterranean area has not been where democratic shake-ups have been most conspicuous; Central European “neighbours” underwent complex developments in a matter of a few years. In the Southern Mediterranean stability seemed well established and political short-sightedness had become a matter of routine, as is clearly shown by the Tunisian case, regularly bandied as an exemplary country in the Euro-Mediterranean club, the only one that had managed to absorb the shock of opening up economically.

Today, the authoritarian obstacle can be overcome, even without the Europeans taking much trouble to achieve this. Here we have a great opportunity to restart a political dialogue that was severely stalled by the events of 9/11 and its consequences. Circumstances now permit the Euro-Mediterranean economic objective contract to be overhauled. They also permit a more extended dialogue to be held on a wider scale on all political issues studiously avoided up to now, ranging from corruption to the reliability of systems of representation. If it is to achieve its mission in the Mediterranean, Europe must not renounce its call for democracy: political convergence needs to become an objective with the same weight as economic convergence, as it is on these two pillars together that an equal and peaceful relationship will be established in the future between the European Union and its Mediterranean partners.
EURO-MEDITERRANEAN PROJECTS AND PROGRAMMES: HOLDING THE MEDITERRANEAN TOGETHER

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The aim of this paper is to review the flagship activities carried out in the Mediterranean area in the light of the experts’ assessment made through the Euromed Survey 2010.1 In order to do so, we have structured our reflection in three sections. The first section aims to evaluate the relative impact of the proliferation of institutional structures within the Euro-Mediterranean region on the projects’ performance. The second section deals with the substantive evaluation of selected projects and programmes under the authorities of the Euro-Mediterranean Partnership and the Union for the Mediterranean. Finally, the third section is intended to exploit the conclusions of the previous sections as well as the lessons drawn from the civic uprisings in the Southern Mediterranean in order to encourage a reflection on how regional programmes are designed and implemented.

I. Proliferation of Euro-Mediterranean Institutional Structures: Implications for Implemented Policies

While regional integration is now considered a global pattern, it was not until 1995 that the Barcelona Process gave birth to the first Mediterranean regional structure.2 Almost sixteen years later, the institutional outcomes of the integration processes between both shores of the Mediterranean remain uncertain. At present, several coexisting integration rationales cover the same territorial framework while sharing similar objectives.3 Namely, the EU’s relations with Mediterranean non-EU members are structured around the Euro-Mediterranean Partnership (EMP), the European Neighbourhood Policy (ENP) and, the latest addition, the Union for the Mediterranean (UfM).

1. The current text does not provide hyperlinks to the official documents and websites referred to. Thus, if interested, we kindly invite you to visit the online edition of the current publication, where each of the references is supported by their respective online documents.
2. It should be noted that previous attempts had already been made by the ECC; namely: the Global Mediterranean Policy (1972) and Renewed Mediterranean Policy (1990). Nonetheless, those attempts can be understood more as commercial policies with its neighbours than truly integration processes.
3. As mentioned in the 2009 Euromed Survey Report: "the main debate is centred on the suitability, linking and coherence of the projects and institutions of the UfM in the heart of what some authors have identified as Greater Barcelona, that is, the Euro-Mediterranean Partnership (EMP) itself, in terms of the policy of the EU to which the member countries of the south Mediterranean region are closely linked, together with other ongoing strategies such as the European Neighbourhood Policy (ENP), the 5+5 Dialogue for the Western Mediterranean, the NATO-Mediterranean Dialogue, the Mediterranean Forum, the EU sectoral strategies, the process of approval of advanced statutes, etc. In all, it is a complex scenario with a risk of dispersion, a high potential for incoherent actions and the coexistence of both a bilateral and multilateral dimension in the relationships between the affected countries."
Accordingly, the total amount of resources allocated to the Euromed area is highly fragmented. In addition, different initiatives managed from different institutions frequently share common financial instruments, therefore increasing the difficulty in identifying the governing authorities. As the 2nd Euromed Survey data shows, connections between the different institutional frameworks are strong to the point of rendering contrasts practically impossible for those who are not familiarised with them.

Thus, this section is expected to identify the institutional and financial structures in the Euro-Mediterranean area in order to evaluate the implications for the implementation of the EMP/UfM projects and programmes.

1.1. Institutional Architecture in the MENA Area

In 1995, the Barcelona Conference gave birth to the Euro-Mediterranean Partnership – commonly designated as the Barcelona Process (BP). Its objectives were based on the following three pillars or baskets: “political and economical partnership”, “sustainable socio-economic development” and “reform and education and socio-cultural exchanges” (for further information, see Table 1). The Barcelona Process established the Association Agreements (AAs)4/5 as the reference framework for the cooperation between the European Union and the Mediterranean Partner Countries (MPCs). This instrument articulates the relations between the European Union and each MPC separately. Thus, because of their bilateral nature, their provisions vary from one Mediterranean Partner to another.6 In May 2004, another EU bilateral instrument was established: the European Neighbourhood Policy (ENP). The ENP is meant to prevent the emergence of dividing lines between the enlarged EU and its neighbourhood.7 Under the ENP umbrella, the EU offers its partners a privileged association that goes far beyond the relations established within the EMP framework. The deepening of these relations materialises in political association, deeper economic integration, increased mobility and multiplication of people-to-people exchanges according to each partner’s commitment to EU core values (democracy, rule of law, respect for human rights, market economy and sustainable development fundamentals).8

With the launching of the UfM in 2008, hybrid multilateralism was introduced in a process which has been essentially governed so far by bilateral dialectics (of the EU vis-à-vis its MPC counterparts). Indeed, the UfM – formally built on the acquis of the former BP9 – was intended to increase co-ownership on the basis of the strictest equality and respect for the sovereignty of all its members. It is necessary to note, however, that the UfM – according to the Paris Declaration of July 2008 – did not put an end to but rather complemented the already existing framework for EU bilateral relations.10

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5. As the Agreements have a “mixed” nature (drawing on the European Community and Member States’ competences), after their signing they have to undergo a ratification process by the national parliaments of the EU Member States. For the implementation of Association Agreements, two common institutions were created: the Association Council (Ministerial) and the Association Committee (at Senior Official level).
6. Notwithstanding, they all established provisions regarding trade in goods, services, socio-economic cooperation, cultural cooperation and EU financial cooperation commitments to accomplish the envisioned goals of the AAs.
7. This ENP framework was proposed to 16 of the EU’s closest neighbours: Algeria, Armenia, Azerbaijan, Belarus, Egypt, Georgia, Israel, Jordan, Lebanon, Libya, Moldova, Morocco, Occupied Palestinian Territory, Syria, Tunisia and Ukraine (for further information, see “Strategy Paper on the European Neighbourhood Policy”, May 2004). Since no Action Plans have been agreed for Algeria, Belarus, Libya and Syria, the ENP has not been fully implemented in those countries.
8. The ENP builds on the already existing agreements between the EU and the concerned partner (whether it is a Partnership and Cooperation Agreement – PCA – or Association Agreement – AA –). In addition, the ENP is articulated through bilateral Action Plans which established an agenda for economic and political reforms on a 3 to 5 year basis. Since no Action Plans have been agreed for Algeria, Belarus, Libya and Syria, the ENP has not been fully implemented in those countries.
9. As stated in the Paris Declaration: “a reinforced partnership – The Barcelona Process: Union for the Mediterranean aims to build on that consensus to pursue cooperation, political and socioeconomic reform and modernisation on the basis of equality and mutual respect for each other’s sovereignty.”
The adoption of the acquis derived from the EMP – particularly, the integration of the objectives and four areas of cooperation\(^\text{11}\) – is, nonetheless, still uncertain. As of today, the UfM has prioritised the design of six flagship projects of a regional and sub-regional nature that, while benefiting from an increased visibility and marketability, also raises doubts about the future of the organisation in the long run.

1.2. The Further Implications of Financial Dependency and Fragmentation on the Establishment of a True Euro-Mediterranean Agenda

It is commonly accepted that the efficient design and implementation of a programme requires its own budget. That is to say, each governing authority should provide its structure with a reliable funding system at its disposal in order to independently design its strategic actions. This is particularly true in organisations pursuing regional integration. Nonetheless, this is not the case of the EMP or the UfM. At present, their programmes and projects strongly rely on the European Union’s will to contribute (for further information, see Box 1 and 2 and Rym Ayadi’s document).

The debate over the resources of the EMP/UfM, even if it is primarily linked to establishing Euro-Mediterranean priorities and the performance of the projects and programmes, is also paramount to the wider discussion over the future of regional integration.

Regarding the first concern, the emphasis must be put on independence. Particularly, the possibility of conciliating the divergent interests of Europe – as the main contributor – with the specific development needs of the MPCs. Obviously, almost every programme has a specific interest for the MPCs but it is important to determine if they actually do respond to the essential needs of the beneficiary countries.

In addition to problems linked to the establishment of a truly common agenda, the actual performance of each programme arises as a key matter. Euro-Mediterranean cooperation today faces three main challenges: inadequacy in the allocation of resources, and fragmentation that contributes to the dissemination and duplication of programmes. That is to say, there should be an assessment of whether the resources are allocated in the proper amounts and in the proper place during the proper time period.\(^\text{12}\)

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**Box 1. From MEDA Programme to ENPI: the EU’s main cooperation instruments in the Mediterranean**

Traditionally, cooperation between the two shores was articulated in the framework of bilateral agreements between the EU and each MPC and thus principally financed by the EU’s own funds on an individual basis. Even if the Euro-Mediterranean Partnership was not equipped with a regional independent funding structure by the time it was launched, the establishment in 1996 of the MEDA Programme meant a major breakthrough regarding funding envelopes. Indeed, allocations are no longer granted on an individual basis but rather on a programme basis. Its 2007 substitute – the European Neighbourhood Partnership Instrument – operates in a similar way (for further information, see Rym Ayadi’s document).

The Euro-Mediterranean Facility for Investment and Partnership (FEMIP) – a funding facility within the European Investment Bank created in 2002 – is the second most important financial instrument for regional cooperation. While the ENPI basically works on a non-returnable basis, the FEMIP works on the principle of loans and discounts, namely:

- Loans for the execution of infrastructure projects
- Loans aimed at the MPCs’ private sector (managed through local banks)
- Technical assistance for MPCs (financed through the ENPI)
- Risk capital facilities for Small- and Medium-Sized Enterprises (financed through the ENPI)

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12. The most common implementation time frameworks – from three to five years – limit their potentialities for realistic macro impact in accordance with the objectives stated.
The aforementioned concerns give rise to a fundamental question regarding the Euro-Mediterranean ambitions regarding regional integration as a financial commitment required for optimal sustainability of a regional institution, which can be considered as an accurate indicator of good will.

**BOX 2. The UfM approach to funding: still an open debate**

While the UfM has adopted a programme-based approach to regional cooperation, it benefits neither from proper resources nor the necessary investments to make it viable. Indeed, the debate around the different systems that could finance the aforementioned projects is still open. Tentatively enough, the Paris Declaration recalls the following sources:

- Private sector participation
- Contributions from the EU budget
- Sovereign funding
- Contributions from non-UfM countries

• Contribution from international financial institutions and regional entities
• Euro-Mediterranean Investment and Partnership Facility (FEMIP)
• ENPI Euro-Med envelope
• Neighbourhood Investment Facility
• Cross-border cooperation instrument within the ENPI.

It is interesting to note the conspiratorial wink in the founding documents. As a matter of fact, not only can private contributors foster initial cooperation – by palliating budgetary scarcity and overcoming political disagreements – but they can also become necessary partners for the success of the projects.1

**II. EMP and UfM Project Assessment: Unawareness and Disappointment in terms of Indispensable Endeavours**

In addition to the proliferation of regional structures, the EU external action towards its neighbouring countries has also grown more complex and differentiated. This fragmentation and differentiation may have impacts on performance – as we have already noted – but what the EuroMed Survey actually assesses is their impact in terms of awareness.

The 2nd IEMed Survey of Experts and Actors clearly shows that many EMP/UfM endeavours are largely unknown even to experts in the field of Euro-Mediterranean policies and politics. For this reason, we have considered it appropriate to compare the experts’ perceptions with the actual progress in each of the implemented actions in order to qualify the experts’ answers but also to present the projects to those readers unaware of their existence.

We would like to note that the results for each question will not be presented in the order set out in the questionnaire but rather according to the degree of relative importance of each programme – as determined by experts – regarding the accomplishment of the Euromed objectives.

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13. In this respect, some public-private consortiums have already been established (e.g., in May 2010, InfraMed, an investment consortium formed by Caisse des Dépôts et Consignation [CDC], Cassa Depositi e Prestiti [Cdp], the European Investment Bank [EIB], the Caisse de Dépôt et de Gestion [CDG] and EFG Hermes, was launched with an initial commitment of €385m).
2.1. Experts’ Assessment of Euro-Mediterranean Sectoral Strategies and Action Plans

Since the establishment of the EMP, Ministerial Meetings have become the driving force of Euro-Mediterranean cooperation. Ministerial Meetings usually adopt a document of conclusions making general political statements on the agreements reached during the meeting. As such, they are not directly operational and should be further developed, articulated and qualified in a set of specific actions. Therefore, these developments must be materialised into Working Plans, Action Plans or, in the most ambitious cases, Sectoral Strategies.

The Euromed Survey assesses the sectoral action plans and strategies that have emerged since 2007 (Graph 1):

Graph 1: Assessment of the EMP action plans and sectoral strategies since 2007

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

2.1.1. Mediterranean Water Strategy

The 3rd Euro-Mediterranean Ministerial Conference on Water – Amman, 22nd December 2008 – requested the Water Expert Group (hereafter, WEG) to develop a Mediterranean Water Strategy (hereafter, MWS). The strategy referred to the integrated management of water resources in the following areas: adaptation measures for climate change, improved intervention in water crisis – flood and droughts –, sustainable demand, protection of water quality and biodiversity and optimisation of resources allocated to water management. Unfortunately, the lack of political agreement on the appropriate denomination of the Palestinian Territories prevented its adoption in April 2010 and, thus, blocked the implantation of many projects already identified by the WEG (for further information, see Eugenia Ferragina’s document).

14. The Marseilles Declaration foresaw 15 sectoral Conferences. Nonetheless, due to political blockages some of them had never been held.

According to the experts interviewed, the MWS is considered of paramount importance for the achievement of Euro-Mediterranean objectives. Indeed, the MWS ranked first compared to all other endeavours evaluated (8.27, where 0 stand for no importance and 10 for the utmost importance). Several factors have contributed to the prioritising of the water sector by expert respondents. First of all, water resources in the Mediterranean area are irregularly distributed within territories and seasons and, accordingly, hydric stress is not uncommon. Secondly, the existence of international river basins and common underground basins, which ought to be shared, intensifies the risk of water conflicts (for further information on water dependency in the area, see Table 1). As a result, water can no longer be understood only as a limited resource but also as a geopolitical source of international conflicts.

In a coherent manner, – as the MWS has not been approved mainly due to a terminological problem derived from the Arab-Israeli conflict – only 32% of respondents saw actual progress.

Table 1: Water in the Southern Mediterranean region, 2000-2008

<table>
<thead>
<tr>
<th>Water resources</th>
<th>Water consumption</th>
<th>By sectors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nationals</td>
<td>Coming from other countries</td>
<td>Water dependency</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turkey</td>
<td>2271</td>
<td>-13.4</td>
</tr>
<tr>
<td>Syria</td>
<td>7.1</td>
<td>9.7</td>
</tr>
<tr>
<td>Lebanon</td>
<td>4.8</td>
<td>-0.3</td>
</tr>
<tr>
<td>Jordan</td>
<td>0.7</td>
<td>0.3</td>
</tr>
<tr>
<td>Israel</td>
<td>0.8</td>
<td>1.0</td>
</tr>
<tr>
<td>Palestinian territories</td>
<td>0.8</td>
<td>0.0</td>
</tr>
<tr>
<td>Egypt</td>
<td>1.8</td>
<td>55.5</td>
</tr>
<tr>
<td>Libya</td>
<td>0.6</td>
<td>0.0</td>
</tr>
<tr>
<td>Tunisia</td>
<td>4.2</td>
<td>0.4</td>
</tr>
<tr>
<td>Algeria</td>
<td>11.3</td>
<td>0.4</td>
</tr>
<tr>
<td>Morocco</td>
<td>29.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Note: a. Last data available
Source: compiled by the IEMed based on FAO Data Sets

2.1.2. 2008-2013 Priority Action Plan on Energy

The Priority Action Plan on Energy was adopted at the 5th Energy Ministerial Conference (Limassol, 17th December, 2007) based on the results of the implementation work over the period 2003-2006. Since then no additional Ministerial Conference has been held. The Limassol Action Plan on the Euro-Mediterranean Energy Partnership mainly referred to energy market reforms and gradual harmonisation of energy policies and regulatory frameworks with a view to creating a common Euro-Mediterranean energy market. Additionally, the plan also foresaw the promotion of sustainability and security and the development of initiatives for infrastructure extension, investment financing and RandD.

16. In this respect, see: MED-REG I and II, EAMGM I and II, Electricity market integration regional projects.
17. In this respect, see: MED-EMIP and MED-ENEI and II, regional projects.
As mentioned by the experts interviewed, the activities foreseen in the Limassol Action Plan (LAP) are fundamental for the achievement of Euro-Mediterranean objectives (7.91). Indeed, energy cooperation is of great importance due to specific constraints and comparative advantages related with energy markets on both shores of the Mediterranean. From the EU perspective, the EU suffers from serious shortage of local energy deposits that makes it very dependent on foreign supplies, especially when taking into consideration the growing energy demand and restricted production capacity. This situation has turned into a growing dependence on some unreliable partners (Graph 2). But then several geological and geopolitical advantages made some of the Southern Mediterranean Countries optimal partners for energy trade.18 From the perspective of MPCs, oil and gas revenues from the EU comprise a substantial proportion of the state income of MPCs and the future implementation of the renewable energy plan forebode an increase in this regard (Table 2). Moreover, cooperation has become a necessary policy for European investors who search for the profitability of their investments and for MPCs which need foreign expertise and capital in order to explore and develop their energy markets.

Graph 2: EU-27 crude oil imports (in million tonnes), 2007**

<table>
<thead>
<tr>
<th>Proportion of EU-27 Import Dependency*, 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>All fuels</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>53.1</td>
</tr>
</tbody>
</table>

*Note: Definition: Import Dependency = Net Imports / (Bunkers + Gross Inland Consumption)
**Note: Figures between brackets represent the country share in relation to the totality of the EU’s imports
Source: Compiled by the IEMed based on Eurostat Data, May 2009

18. Namely, we refer to untapped reservoirs of high quality oil and gas and cost-effective shipment of supplies to major consuming regions.
Graph 3: EU-27 gas imports (in TJ, terajoules), 2007**

Proportion of EU-27 Import Dependency*, 2007

<table>
<thead>
<tr>
<th></th>
<th>All fuels</th>
<th>Solid fuels</th>
<th>Oil</th>
<th>Gas</th>
</tr>
</thead>
<tbody>
<tr>
<td>53.1</td>
<td>41.2</td>
<td>82.6</td>
<td>60.3</td>
<td></td>
</tr>
</tbody>
</table>

Note: Definition: Import Dependency = Net Imports / (Bunkers + Gross Inland Consumption)

**Note: Figures between brackets represent the country share in relation to the totality of the EU’s imports

Source: Compiled by the IEMed based on Eurostat Data, May 2009

Table 2: Main indicators on MPC’s mineral fuels, lubricants and related materials exportations, 2007

<table>
<thead>
<tr>
<th></th>
<th>GDP at current market prices (Million Euro)</th>
<th>Total Exports as % of GDP</th>
<th>SIT 3 Exports as % of Total Exports*</th>
<th>SIT 3 Exports - all the world - as % of GDP</th>
<th>SIT 3 Exports into the EU as % of GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2007a</td>
<td>2007a</td>
<td>2007a</td>
<td>2007a</td>
<td>2007a</td>
</tr>
<tr>
<td>Algeria</td>
<td>98,560.38</td>
<td>44.5</td>
<td>98.4</td>
<td>43.8</td>
<td>19.0</td>
</tr>
<tr>
<td>Egypt</td>
<td>95,726.50</td>
<td>12.3</td>
<td>52.2</td>
<td>6.4</td>
<td>2.2</td>
</tr>
<tr>
<td>Morocco</td>
<td>54,929.49</td>
<td>19.4</td>
<td>3.8</td>
<td>0.7</td>
<td>0.3</td>
</tr>
<tr>
<td>Tunisia</td>
<td>28,457.48</td>
<td>38.9</td>
<td>16.2</td>
<td>6.3</td>
<td>5.6</td>
</tr>
<tr>
<td>Israel</td>
<td>122,757.81</td>
<td>32.2</td>
<td>0.2</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Jordan</td>
<td>11,388.07</td>
<td>16.0</td>
<td>0.3</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Lebanon</td>
<td>18,282.04</td>
<td>22.9</td>
<td>0.7</td>
<td>0.2</td>
<td>0.0</td>
</tr>
<tr>
<td>Occupied Palestinian Territory</td>
<td>3,750.80</td>
<td>10.0</td>
<td>0.2</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Syria</td>
<td>29,486.28</td>
<td>28.6</td>
<td>41.1</td>
<td>11.7</td>
<td>10.2</td>
</tr>
</tbody>
</table>

Note: SITC Rev.3 code = Standard International Trade Classification Section: 3 - Mineral fuels, lubricants and related materials which includes 32 - Coal, coke and briquettes, 33 - Petroleum, petroleum products and related materials, 34 - Gas, natural and manufactured, 35 - Electric current

Source: Compiled by the IEMed based on Eurostat Data Sets (2007 data. Lebanon data refers to 2006)
The assessment of the progress made is consistent with the projects that have actually been implemented. The awareness rate is the highest among the rest of the EMP strategies and plans surveyed. This slight difference can be understood considering the progress rate perceived regarding the implementation and performance of the activities foreseen in the LAP. Indeed, with 55% of respondents confirming actual progress in that field, the LAP also ranks highest among EMP strategies and plans surveyed.19

2.1.3. Employment Framework of Actions

The Employment Framework of Actions (EFA) was first established during the first Euro-Mediterranean Employment and Labour Ministers Conference in 2008. Its key objectives were creating more jobs, enhancing employability and generating decent working conditions. The Euro-Med Employment and Labour Working Group was entrusted with the follow-up tasks and has been supported by the Euro-Med Social Dialogue Forum (SDF) – a consultation body aimed at promoting social dialogue in the Euro-Mediterranean countries and region.20

The EFA’s overall importance for the Euromed objectives is remarkably well-perceived, since it is rated as the third most urgent action. Moreover, a third of the respondents gave the EFA the maximum grade (10 points out of 10). This is not surprising considering that the EFA was intended to mitigate the effects on trade diversion21 derived from the EMFTA in terms of employment (for further information, see De Wulff’s document).

As for progress, other than the fact that 40% of respondents do not have an opinion on the progress made by the EFA, it is especially significant that not only do 59% of respondents think there has been no evolution in implementation but up to 21% consider there has actually been a regression – which is the poorest registered perception when compared to the other EMP programmes. Those assessments are not surprising considering that there has been no project or budget allocation in this regard.

Indeed, results are coherent with facts. The high unemployment rates along with the high share of informal22 and non-decent work23 in the South is likely to be the reason why those evaluations were made (Table 3). The comparison between the assessments and the actions and meetings carried out so far emphasises the need to reinforce the dimension and effectiveness of the SDF and implement actions to address human capital development, youth employability and vocational training issues.

19. Here we can mention the remarkable progress made by the Association of Mediterranean Regulators for Electricity and Gas – a public and private partnership – in the promotion of a transparent, stable and harmonised regulatory framework within MED-REG I and II; the exchange of professional expertise within MED-EMIP; the integration of the gas markets of Egypt, Jordan, Lebanon and Syria by the Euro-Arab Mashreq Gas Co-operation Centre within EAMGM I and II and the promotion of sustainability in construction within ENEC I and II (for further information, see Gawdat Bahgat’s document).

20. The first meeting of the UFM-SDF was hosted by the Spanish EU Presidency on 11th March 2010 in Barcelona. At this meeting, social partners agreed to focus – as a first concrete step for cooperation under the SDF framework – on an exchange of experts charged with determining the concrete skills demanded by the labour market.


22. Usually concealed by low percentages of employed population.

23. The Decent Work concept was formulated by the ILO’s constituents – governments and employers and workers – as a means to identify the Organisation’s major priorities. It is based on the understanding that work is a source of personal dignity, family stability, peace in the community, democracies that deliver for people, and economic growth that expands opportunities for productive jobs and enterprise development.
### Table 3: Employment and unemployment main figures, 2007-2009

<table>
<thead>
<tr>
<th></th>
<th>Employed population</th>
<th>Unemployment rate</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Thousands</td>
<td>%</td>
<td>% Labour force</td>
<td>% Labour force aged 15-24</td>
</tr>
<tr>
<td>Turkey</td>
<td>21,276</td>
<td>40.3</td>
<td>14.0</td>
<td>25</td>
</tr>
<tr>
<td>Syria</td>
<td>4,945</td>
<td>46.3</td>
<td>8.4</td>
<td>19.0</td>
</tr>
<tr>
<td>Lebanon</td>
<td>1,119</td>
<td>42.1</td>
<td>9.0</td>
<td>22.0</td>
</tr>
<tr>
<td>Jordan</td>
<td>n.a.</td>
<td>43.1</td>
<td>12.9</td>
<td>26.9</td>
</tr>
<tr>
<td>Israel</td>
<td>2,786</td>
<td>52.8</td>
<td>7.6</td>
<td>14.7</td>
</tr>
<tr>
<td>Palestine</td>
<td>718</td>
<td>32.4</td>
<td>24.5</td>
<td>46.9</td>
</tr>
<tr>
<td>Egypt</td>
<td>22,776</td>
<td>44.1</td>
<td>9.4</td>
<td>24.8</td>
</tr>
<tr>
<td>Libya</td>
<td>n.a.</td>
<td>48.2</td>
<td>n.a</td>
<td>n.a.</td>
</tr>
<tr>
<td>Tunisia</td>
<td>n.a.</td>
<td>41.1</td>
<td>14.2</td>
<td>31.6</td>
</tr>
<tr>
<td>Algeria</td>
<td>9,146</td>
<td>52.0</td>
<td>11.3</td>
<td>24.0</td>
</tr>
<tr>
<td>Morocco</td>
<td>9,255</td>
<td>47.5</td>
<td>10.0</td>
<td>21.8</td>
</tr>
<tr>
<td>EU Med Countries meanb</td>
<td>74,105</td>
<td>50.6</td>
<td>8.8</td>
<td>22.0</td>
</tr>
<tr>
<td>Med-11 mean</td>
<td>72,021</td>
<td>44.5</td>
<td>11.0</td>
<td>23.4</td>
</tr>
</tbody>
</table>

Note: a. Latest data available from this period. Data unavailable
Note: b. Portugal, Spain, France, Italy, Malta, Cyprus, Greece
Source: Compiled by the IEMed on ILO (data. 2007. Lebanon data refers to 2006)

### Graph 4: Country unemployment 2008 (%) and its long-term unemployment
(as % of total unemployment)

![Graph showing unemployment percentages](image)

Source: Compiled by the IEMed based on Medstat Data
2.1.4. Regional Transport Action Plan for the Mediterranean

The Regional Transport Action Plan (hereafter, RTAP) for the period 2007-2013 was requested by the 1st Euro-Mediterranean Conference of Transport Ministers at the Transport Forum in order to implement the recommendations included in the Blue Paper “Towards an Integrated Euro-Mediterranean Transport System” and in the Final Report of the High Level Group on “Extension of the Trans-European Transport Priority Axes to Neighbouring Countries”. In particular, the RTAP focuses on regulatory reforms and infrastructure network planning and construction in different transport sectors (maritime, road, railways and civil aviation) with a view to increasing their efficiency while improving the connectivity, security and quality of the overall Mediterranean transport network. Its implementation is coordinated by the Euromed Transport Project with the further technical support provided by other Euro-Mediterranean Regional projects.

Even though accessibility is of paramount importance for the success of trade integration and economic development, Euro-Mediterranean transport policy is still at a premature stage of development mainly due to national constraints of MPCs in terms of infrastructure and regulations (Table 4). Available data seems to confirm that Euromed Survey respondents are aware of this fact by ranking the RTAP at the same level of the Employment Action Plan as for its potential contribution to the overall Euromed achievements. However, it is imperative to note that cooperation schemes on transport are widely unknown: 42% of respondents do not have the information to assess whether or not there has been progress in the transport domain covered by the RTAP — surely due to its highly technical nature. As for the progress made in this field, 46% of those polled considered that there has been actual development.

Table 4: The logistics performance index in the Euromed area, 2010

<table>
<thead>
<tr>
<th>LPI Rank (out of 155)</th>
<th>Country</th>
<th>LPI</th>
<th>Customs</th>
<th>Infrastructure</th>
<th>International shipments</th>
<th>Logistics competence</th>
<th>Tracking and tracing</th>
<th>Timeliness</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean EU-27</td>
<td>3.49</td>
<td>3.27</td>
<td>3.38</td>
<td>3.30</td>
<td>3.42</td>
<td>3.61</td>
<td>3.96</td>
</tr>
<tr>
<td></td>
<td>MPC’s mean</td>
<td>2.77</td>
<td>2.43</td>
<td>2.54</td>
<td>2.86</td>
<td>2.72</td>
<td>2.58</td>
<td>3.43</td>
</tr>
<tr>
<td>31</td>
<td>Israel</td>
<td>3.41</td>
<td>3.12</td>
<td>3.60</td>
<td>3.17</td>
<td>3.50</td>
<td>3.39</td>
<td>3.77</td>
</tr>
<tr>
<td>33</td>
<td>Lebanon</td>
<td>3.34</td>
<td>3.27</td>
<td>3.05</td>
<td>2.87</td>
<td>3.73</td>
<td>3.16</td>
<td>3.97</td>
</tr>
<tr>
<td>39</td>
<td>Turkey</td>
<td>3.22</td>
<td>2.82</td>
<td>3.08</td>
<td>3.15</td>
<td>3.23</td>
<td>3.09</td>
<td>3.94</td>
</tr>
<tr>
<td>61</td>
<td>Tunisia</td>
<td>2.84</td>
<td>2.43</td>
<td>2.56</td>
<td>3.36</td>
<td>2.36</td>
<td>2.56</td>
<td>3.57</td>
</tr>
<tr>
<td>80</td>
<td>Syrian Arab Republic</td>
<td>2.74</td>
<td>2.37</td>
<td>2.45</td>
<td>2.87</td>
<td>2.59</td>
<td>2.63</td>
<td>3.45</td>
</tr>
<tr>
<td>81</td>
<td>Jordan</td>
<td>2.74</td>
<td>2.31</td>
<td>2.69</td>
<td>3.11</td>
<td>2.49</td>
<td>2.33</td>
<td>3.39</td>
</tr>
<tr>
<td>92</td>
<td>Egypt, Arab Rep.</td>
<td>2.61</td>
<td>2.11</td>
<td>2.22</td>
<td>2.56</td>
<td>2.87</td>
<td>2.56</td>
<td>3.31</td>
</tr>
<tr>
<td>130</td>
<td>Algeria</td>
<td>2.36</td>
<td>1.97</td>
<td>2.06</td>
<td>2.70</td>
<td>2.24</td>
<td>2.26</td>
<td>2.81</td>
</tr>
<tr>
<td>132</td>
<td>Libya</td>
<td>2.33</td>
<td>2.15</td>
<td>2.18</td>
<td>2.28</td>
<td>2.28</td>
<td>2.08</td>
<td>2.98</td>
</tr>
<tr>
<td>n.a</td>
<td>Morocco</td>
<td>n.a</td>
<td>n.a</td>
<td>n.a</td>
<td>n.a</td>
<td>n.a</td>
<td>n.a</td>
<td>n.a</td>
</tr>
</tbody>
</table>

Note: The Logistic Performance Index is a multidimensional assessment of logistics performance, rated on a scale from 1 (worst) to 5 (best). Feedback from operators is supplemented with quantitative data on the performance of key components of the logistics chain in the country of work (WB, 2010).
1. Efficiency of the customs, 2. Quality of trade and transport-related infrastructure, 3. Clearance process, 4. Ease of arranging competitively priced shipments and competence and quality of logistics services, 5. Ability to track and trace consignments, 6. Frequency with which shipments reach the consignee within the scheduled or expected time.

2.1.5. Euro-Mediterranean Industrial Cooperation 2009-2010 Work Programme

The 2009-2010 Work Programme was approved by industry ministers at the 7th Euro-Mediterranean Ministerial Meeting on Industrial Cooperation, held in Nice on 5th and 6th November 2008.27 Euro-Mediterranean Industrial Cooperation is developed within the frameworks of the ENP and the UFM with the main purpose of helping businesses to access global markets. Specifically, it aims to create an environment in which MPCs and EU companies can export, import, invest, build business partnerships and create jobs under the same conditions of efficiency and legal certainty as those prevailing in the European single market through the exchange of information, knowledge, tools and good practices.

In regard to the importance of industrial cooperation for Euromed objectives, the 2-year plan is ranked in fifth place (among the 8 sectoral strategies evaluated) with an average of 7.43. As for the evaluation of its progress, it also remains fifth in the list closely preceded by the RTAP (46%) and the Working Programme on Tourism (45%).

These results also show that 6% consider that there has been no progress on the implementation of these programmes. Again, this last opinion only concerns 33% of the participants in the Survey, since 41% of the responses indicated no knowledge of this particular field. Although the average answers obtained among those who claim to possess an understanding of the Mediterranean area are rather positive, it should be emphasised that the main objectives of the industrial cooperation in the region are still to be achieved (Box 3). In particular, with regards to the implementation of the Euro-Mediterranean Charter for Enterprise28 – closely linked to the UFM’s Mediterranean Business Development Initiative – has a far more optimistic assessment than the actual progress of the initiative could explain, especially since Egypt and Tunisia, two of the best performing countries out of the four that had made notable progress, are now going through deep political reforms. Other activities linked to the work programme 2009-2010 – such as “trade facilitation for industrial products” and “sustainable enterprise development and energy efficiency” – also have positive assessments, while others are considered to be in need of some improvement – i.e., “innovation and technology transfer”, “promoting investment” and, especially, “improving the dialogue on the future of the textile and clothing sector”.

**BOX 3: Report on the implementation of the Euro-Mediterranean Charter for Enterprise: key findings**

“(…) From a regional perspective, the assessment shows that most of the MED countries have been relatively successful in developing policy tools to promote enterprise creation, as in the cases of the development of the microfinance industry in Morocco, and the Social Fund for Development in Egypt. A number of good practices have developed in several MED countries that could be extended to other countries in the MED region. This is a good start, but much remains to be done to effectively promote and support entrepreneurship, in particular among women and young graduates, filling the gap in this area in relation to other fast-growing emerging economies.

The MED region has also been relatively successful in improving company registration procedures, but the MED countries are only starting to tackle administrative barriers to enterprise development. The results are more mixed in relation to support for high-growth enterprises. Skill development is at a very early stage. Innovation policy is also only incipient in most countries. Even in the best performing countries in this policy area (such as Egypt and Tunisia), innovation policy is just now evolving from pilot projects into structured intervention. However, nearly all the MED countries have developed industrial modernisation processes over the years that in most cases have been quite successful, providing the basis for launching more advanced policies.

27. Priorities are defined by Industry Ministers’ biannual meetings and are translated into 2-year work programmes on Euro-Mediterranean industrial cooperation. The 8th Euro-Mediterranean Ministerial Conference on Industrial Cooperation, held in Malta on 11th-12th May 2011, has adopted the work plan for the two following years.

28. The main objectives of the Euro-Mediterranean Charter for Enterprise: to play the globalisation card and make the most of the opportunities offered by the opening up of the Euro-Mediterranean economic area, to remain competitive and create a sufficient number of jobs for newcomers to the labour market, strategies to be implemented to create added value and achieve complementary economic development, to foster entrepreneurship and attract foreign investment on a durable basis.
2.1.6. Mediterranean Maritime Strategy

The final declaration of the Marseilles Euro-Mediterranean Conference, in November 2008, called for the development of a harmonised maritime policy and a Mediterranean maritime strategy (MMS) following the implementation guidelines, priorities and mechanisms established by an ad-hoc group of experts. Since its creation, the Group of Experts on Integrated Maritime Policy in the Mediterranean has met periodically with the participation of the coastal states with the objective of exploring issues related to maritime governance, coastal management, implementation of international agreements or fishing. However, given that the strategy has not been formally approved by the Community institutions, both the project design and the role to be played by the MPCs in a purely European policy are uncertain.29

The experts asked about the importance of this strategy in the objectives of the Euro-Mediterranean Partnership express a high level of ignorance. More than 24% of respondents feel unable to comment on the importance of the MMS for the development of Euromed objectives, the highest percentage for the plans and strategies asked about in B.6. Among those who do answer, although the average assessment of 7.36 is high, it is comparatively one of the lowest for the question. The high technical component, the lack of visibility and the fact that it is not a media issue probably explain both the lack of knowledge and the importance given to the MMS by respondents.

When asked about the progress made, 44% of respondents point out that they are unable to answer the question. This degree of unawareness undoubtedly affects the respondents’ assessment as it shows that it is a little known element and probably many of those who are familiar with it have a very limited knowledge. The percentage of respondents who consider that there has been progress is one of the lowest: 35%. The fact that the progress reflected is at a second level (meetings, technical cooperation projects…) and the lack of Mediterranean co-ownership explain these results.


The Istanbul Action Plan on Strengthening the Role of Women in Society (hereafter, IAPSRW), a five year long common Framework of Action, was adopted in the Euro-Mediterranean Ministerial Conference held in Istanbul on 14th-15th November 2006.30 The IAPSRW articulates its actions in three priority axes: promotion of women’s rights as a guarantee of democratic stability and human rights protection, women’s access to education and the labour market and mutation of gender perceptions through cultural activities and mass media.31

29. The European Commission has issued the communication “Towards an Integrated Maritime Policy for better governance in the Mediterranean” and has launched a project of technical assistance for maritime cooperation within the framework of the ENPI. Moreover, in collaboration with the European Investment Bank and the International Maritime Organisation (hereafter, IMO) a maritime cooperation project has started based on three main issues: social aspects, maritime security and investments in infrastructures. Meanwhile, the Commission encourages cooperation in fishing (in collaboration with the FAO) or cooperation between coastguards, without forgetting the large-scale projects on maritime security (SAFEmed II in the framework of the ENPI), environmental protection (Horizon 2020) or maritime transport (Motorways of the Sea, also in the framework of the ENPI) which need the MMS to guarantee their development and coherence.

30. Three years later, on 11th-12th November 2009, a new Conference was held in Marrakech under the umbrella of the UFM.

31. Two projects have been developed within its framework: Enhancing Equality between Men and Women in the Euromed Region and the Role of Women in Economic Life. The former promotes gender equality and the full implementation of the “Convention on the Elimination of All Forms of Discrimination against Women” (CEDAW) as well as increasing awareness of gender-based violence. Additionally, it also assists with the follow-up of the IAPSRW. The latter – completed in 2008 – was intended to expand opportunities for women to participate in economies of MPCs through their integration into the labour market; specific support for enterprise creation and management, improved access to financial mechanisms and vocational training.
As for the importance given by the respondents to gender equality for the Euromed, the vast majority considered it to be a less urgent topic compared to other plans. Thus, according to the available data, not only should the EMP fight against societies’ prejudices but also against Euro-Mediterranean experts’ lack of sensibility towards gender. Nevertheless, the EMP seems to have been successful at raising awareness of women’s rights: the Istanbul Action Plan is more easily identified than any of its counterparts. These facts should, nonetheless, be qualified in accordance with the respondents’ profile. On average, women considered the Istanbul Action Plan to be more important to the accomplishment of Euromed objectives than men (7.48 vs. 7.09) and the difference in their perception of progress was even wider (58% to 51%).

Even if the IAPSRW is ranked last but one regarding Euromed objectives, it is also true that respondents consider that it has been one of the areas where greater progress has been made (56% consider there has been actual progress). Indeed, since 2006, a significant number of initiatives related to law reforms have been undertaken by several countries concerning mainly private matters, such as divorce and child custody within family codes. In addition, many countries have adopted new statutes or national plans to combat violence against women (not only in the domestic and public environments but also in the forms of forced marriage, genital mutilation, honour crimes and human traffic for sexual purposes). As for women’s access to employment and educational and economic rights, significant progress has also been made. Notwithstanding, according to the “Multi-Annual Report on Strengthening the Role of Women in Society in the Euro-Mediterranean Region”, the fight against violence and fostering women’s employability (Table 5) are still of central concern for the vast majority of MPCs and immense efforts have still to be made.

Table 5: The Gender Inequality Index (GII) in 2011 UNDP Human Development Report to MED-11

<table>
<thead>
<tr>
<th>GII Dimensions</th>
<th>Health</th>
<th>Empowerment</th>
<th>Labour Force</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender Inequality Index</td>
<td>Maternal mortality ratio</td>
<td>Adolescent fertility rate</td>
<td>Seats in parliament</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Female</td>
</tr>
<tr>
<td>–</td>
<td>2008</td>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>Very High Human Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Israel</td>
<td>28</td>
<td>0.332</td>
<td>4</td>
</tr>
<tr>
<td>High Human Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>53 Libya</td>
<td>52</td>
<td>0.504</td>
<td>97</td>
</tr>
<tr>
<td>81 Tunisia</td>
<td>56</td>
<td>0.515</td>
<td>100</td>
</tr>
<tr>
<td>82 Jordan</td>
<td>76</td>
<td>0.616</td>
<td>62</td>
</tr>
<tr>
<td>83 Turkey</td>
<td>77</td>
<td>0.621</td>
<td>44</td>
</tr>
<tr>
<td>84 Algeria</td>
<td>70</td>
<td>0.594</td>
<td>180</td>
</tr>
<tr>
<td>Medium Human Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>101 Egypt</td>
<td>108</td>
<td>0.714</td>
<td>130</td>
</tr>
<tr>
<td>111 Syria</td>
<td>103</td>
<td>0.687</td>
<td>130</td>
</tr>
<tr>
<td>114 Morocco</td>
<td>104</td>
<td>0.693</td>
<td>240</td>
</tr>
<tr>
<td>Other Countries or Territories</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>– Lebanon</td>
<td>–</td>
<td>–</td>
<td>150</td>
</tr>
<tr>
<td>– Occupied Palestinian Territory</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
</tbody>
</table>

Note:* The Gender Inequality Index is a composite measure reflecting inequality in achievements between women and men in three dimensions: reproductive health, empowerment and the labour market. It varies between zero (when women and men fare equally) and one (when men or women fare poorly compared to the other in all dimensions), (UN, 2010).
Source: Compiled by the IEMed based on the UNDP Human Development Report 2010

32. Notable in this respect is the Moroccan government’s retraction of its former reservations to CEDAW within the Law of Personal Status (the Moroccan Family Code, known as Moudawana) and the adoption of the Optional Protocol of CEDAW by Decree on July 2008 in Tunisia.
2.1.8. Working Programme on Tourism

First established in the Euro-Mediterranean Ministerial Conference on Tourism, held in Fez in April 2008, the Working Programme on Tourism aims to enhance the impact of tourism on job creation, infrastructure development and inter-cultural understanding while ensuring environmental sustainability.33

With regard to the importance for Euromed objectives, tourism is considered as the least important of the eight different sectoral strategies and action plans assessed in the Survey. This poor sectoral perception is quite surprising since tourism in the region is among the first potential causes for employment creation. (Graph 5) is intended to illustrate this by representing the comparative growth in tourist arrivals in relation to exports for each Mediterranean country.

Graph 5: Main tourism indicators, 2008-2009

The Working Programme on Tourism is ranked 4th when measuring its progress, even if there are no clear outputs regarding this work programme. To be precise: no regional project is currently financing or assisting economic development in this sector. However, in order to understand these figures, it is important to take into account that two EMP structures – FEMIP and “Invest in Med” – are currently directly or indirectly funding private initiatives related to tourism.34 In this respect, the Working Programme on Tourism is revealing of one of the key ideas stated in the introduction: connections between the different institutional frameworks are now strong to the point of rendering contrasts practically impossible. However, it is notable that the lack of outputs derived from regional projects may well also be the reason why up to 55% of respondents claim to have a rather negative vision of the progress made so far.

33. Also in 2008, the “Agenda for a sustainable and competitive European Tourism” was adopted, establishing a medium-to-long term set of actions to be executed by stakeholders in order to promote sustainable practices and competitiveness. Along similar lines, the 2nd Euro-Mediterranean Ministerial Conference on Tourism held in 2010 under the UfM framework agreed to further developed sustainable tourism as a source of economic growth and prosperity respectful of the specificities of the Euro-Mediterranean region.

34. The FEMIP supports tourism by providing long-term loans for large-scale projects. It also provides indirect funding for small- and medium-sized investment projects as well as financial resources in the form of private equity to foster private sector tourism projects. Finally, it assists promoters by providing technical assistance during the different stages of project implementation. “Invest in Med” regional programmes through its initiatives Euromediterranean Tourist Investment Network (ETINET) and REST-MED Business Eco-Sustainable Tourism in the Mediterranean area also intends to contribute to the promotion of tourism investments in the Mediterranean by establishing regional partnerships.
2.2. Experts’ Assessment of UfM Flagship Initiatives

As already mentioned, the 2008 Paris Declaration identified six concrete region-wide projects. However, their final launching has been delayed due to political dissensions and financial difficulties. Indeed, it was not until recently – 8th April 2011 – that Senior Officials formally adopted the guidelines that will regulate the adoption and execution of UfM projects. Therefore, in their current state, the majority of initiatives are at the pre-feasibility study or project identification stage.

As to the importance for the achievement of Euromed objectives, all the initiatives under the umbrella of the UfM are ranked at the same level (except for the Civil Protection projects, which scored slightly lower). Paradoxically, when considering their relative importance and progression, they all rank above the aforementioned ENP programmes even if there is an obvious thematic overlap between UfM and ENP programmes and the ENP is the only one to have ever produced tangible outcomes (Graph 6). In this respect, the UfM has clearly succeeded in its visibility policy to the point that not only its projects are considered to better contribute to the achievement of the Euromed objectives than those of the ENP, but they have also spread an illusion of progress among the surveyed experts.

**Graph 6: Assessment of the UfM initiatives**

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Progress</th>
<th>No progress</th>
<th>Regression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative energies: Mediterranean Solar Plan</td>
<td>60%</td>
<td>38%</td>
<td>2%</td>
</tr>
<tr>
<td>De-pollution of the Sea</td>
<td>29%</td>
<td>64%</td>
<td>6%</td>
</tr>
<tr>
<td>Mediterranean Business Development Initiative focusing on micro, small- and</td>
<td>45%</td>
<td>50%</td>
<td>5%</td>
</tr>
<tr>
<td>medium-sized enterprises</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Higher education and research, Euro-Mediterranean University in Slovenia</td>
<td>58%</td>
<td>36%</td>
<td>6%</td>
</tr>
<tr>
<td>and Fez</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Civil protection initiatives to combat natural and man-made disasters</td>
<td>34%</td>
<td>59%</td>
<td>6%</td>
</tr>
<tr>
<td>Maritime and land highways</td>
<td>31%</td>
<td>65%</td>
<td>3%</td>
</tr>
<tr>
<td>Average (0 to 10)</td>
<td>8.21</td>
<td>8</td>
<td>7.98</td>
</tr>
<tr>
<td></td>
<td>7.87</td>
<td>7.75</td>
<td>7.46</td>
</tr>
</tbody>
</table>

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

2.2.1. The Mediterranean Solar Plan

The Mediterranean Solar Plan (hereafter, MSP) is one of the six initial projects foreseen in the Paris Declaration.\textsuperscript{35} The MPS is intended to develop 20 GW of additional renewable energy production capacities in the Southern Mediterranean by 2020 while pursuing energy efficiency.\textsuperscript{36}

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\textsuperscript{35} Since then, no Ministerial Conference has been held strictly on the matter. Nonetheless, representatives and Ministers of the 43 UfM member states had already gathered during the high-level Conference on the Mediterranean Solar Plan – Valencia, 11th-12th May – convened within the framework of the Spanish Presidency of the EU.

\textsuperscript{36} The power is meant to be achieved through an energy mix of solar thermal, photovoltaic and wind technologies – in accordance with the particularities of each territory. The intention is to achieve energy self-sufficiency in the MPCs and to obtain a significant surplus that may be marketable with the EU through the appropriate interconnection structures.
The importance of the MSP should be assessed in relation to its inclusion in the UfM. As we have already noted, it is highly ranked not only because of its potential benefits for the regions involved but also for its inclusion under the UfM umbrella.

The relevance for Europe can be understood with regards to the EU’s dependency on foreign supplies (see the previous section of this paper) and the commitments foreseen in the Commission Directive 2009/28/EC on promotion of the use of energy from renewable sources. On the other hand, the MSP meant an opportunity for the MPCs to take advantage of their high potential for generating energy from renewable sources – and cost-efficiently shipping it – while upgrading their national legal and technical framework (Maps 1 and 2).

60% of respondents perceived actual progress in the MSP. Nonetheless, even while rarely being noticed by those surveyed, some difficulties are currently limiting the MSP prospects: precarious funding, financial and institutional unreliability and legal and technical barriers. That is, the lack of sufficient funding\(^37\) – intensified by the economic and financial crisis and the bad investment climate – along with the inexistence of a common regulatory framework and the appropriate infrastructures in terms of electricity interconnections and national grids will make the MSP launching problematic. The uncertain articulation between the MSP and the already existing and much more proficient DESERTEC Foundation initiative must also be taken into account because of its implications in terms of duplication and lack of coordination.

2.2.2. De-pollution of the Mediterranean Sea

At the UfM, the objective of de-pollution of the Mediterranean Sea mainly focuses on the implementation of the Horizon 2020 initiative, which seeks to remove the sources responsible for 80% of pollution in the Mediterranean (mainly urban waste and industrial emissions).\(^38\)

In keeping with the previous assessments, the experts asked about the importance of the project in the framework of the Euro-Mediterranean objectives point out two aspects: a high degree of knowledge about the existence of the project (only 12% of “Don’t know” responses) and a very high assessment of its importance (8 on average). However, when we analyse the response to the question about the progress achieved by this project, the situation changes considerably. On the one hand, it is the second UfM project whose progress is more unknown by the experts. Around 39% of respondents are unable to answer whether it has progressed or not because of lack of knowledge. On the other hand, among those who assess its evolution, only 29% believes that it has progressed, the lowest percentage for all UfM projects. The reason for these results can be found in the fact that there is no clear perception about what the UfM project itself contributes to the Horizon 2020 initiative in operation and which brings together most Euro-Mediterranean de-pollution projects.\(^39\) Again, we are faced with the fear that the UfM will not only fragment the budgets aimed at de-pollution of the Mediterranean (Blue Plan and Horizon 2020) but that in the end it will freeze them. Moreover, this project has

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38. The Horizon 2020 initiative was constituted based on previously existing initiatives and projects and operates within the framework of pre-existing policy instruments in support of the implementation of the commitments of the Barcelona Convention. Horizon 2020 has the participation of European institutions (Commission, EIB, EEA) along with national focal points from EuroMed countries as well as international bodies, local governments, NGOs and representatives of the private sector. With the UfM, the geographic framework was broadened to the Balkan neighbouring countries. The three components of the initiative (Capacity Building, Investments, and Monitoring and Research) have launched projects funded by the European Commission (Hot Spots Investment Programme [MehSIP-PPIF]; Shared Environmental Information System [ENPI-SEiS]; and Capacity Building/Mediterranean Environment Programme [H2020 CB/MEP]). Moreover, in the framework of the ENPI the project Sustainable Water Management and De-pollution of the Mediterranean is underway (2009-2013), closely linked to the Horizon 2020 and the MWS objectives.
39. It would be interesting to have the respondents’ view on the progress of Horizon 2020, which would allow us to establish a more balanced comparison. Although we lack this information, we do have the assessment of some of the respondents (who are familiar with the issue) on the progress of the programme “Sustainable Water Management and De-pollution of the Mediterranean”, which supports the implementation of demonstration projects in integrated water management, coastal zone management and Horizon 2020, and receives an average assessment of 5.
been framed within the Water and Environment Division, which has been much more active in
terms of issues related to the management of water sources (despite political impediments)
than in the approach to de-pollution in the Mediterranean.

2.2.3. Mediterranean Business Development Initiative
The Mediterranean Business Development Initiative (MBDI) is a UfM project aimed at assisting
the entities in partner countries operating in support of micro, small and medium-sized enter-
prises by assessing their needs, defining policy solutions and providing these entities with
resources in the form of technical assistance and financial instruments. The Initiative is based
on the principle of co-ownership and its activities are expected to be complementary to those
of the existing entities working in the same field. The already established Projects Funding
Coordination and Business Development area of the UfM Secretariat has the responsibility of
identifying, coordinating and channelling the initiatives relating to business development within
the UfM sphere, and can extend and improve the already existing programmes and budgets
committed by the EU.40

According to the Survey results, this is perceived as the third most important programme of the
UfM, almost achieving the same mean (8) as “De-pollution of the Mediterranean Sea”. Up to 67%
of the assessments consider this programme to be of very high importance (between 8 and 10).
This figure follows the trends of evaluations of other UfM programmes largely due to the fact they
are based on expectations and not on implemented actions foreseen by the committed budget.

As for the progress in this area, 55% of respondents did not perceive any progress (50%) and, in
some cases, they even indicate a regression (5%). The UfM roadmap for the SMEs was set up in
2011 and puts forward as a primary task the implementation of the Mediterranean Business Develop-
ment Initiative, which could be an opportunity for improving the way this programme is now perceived.

Again, similarities in the objectives can be found between the MBDI and other initiatives such
as the Euro-Mediterranean Charter for Enterprise, previously analysed in the Euro-Mediterra-
nean Industrial Cooperation Work Programme. Attention should be paid to avoiding lack of
coordination and potential duplication of actions.

2.2.4. Higher Education and Research, Euro-Mediterranean University in Slovenia and Fez
During the 1st Euro-Mediterranean Ministerial Conference on Higher Education and Scientific Re-
search, held in Cairo on 18th June 2007, the Euromed partners affirmed their commitment to the
objective of creating a Euro-Mediterranean area of higher education and research, as well as clearly
defined guidelines for future cooperation in this area.

The EMUNI University was established as an international network of universities (141 members
from 37 countries in 2010) and is co-funded by the EU. Among its main objectives we can find
the creation of a common higher education and research area, the enhancement of intercultural
dialogue through its network of member universities and the promotion of quality within higher edu-
cation. EMUNI also exploits the possibilities offered by higher education cooperation programmes
such as Tempus41 (modernisation of higher education) and Erasmus Mundus42 (scholarships and
academic cooperation between the EU and the rest of the world).

40. Today’s existing entities in partner countries operating in support of micro, small- and medium-sized enterprises in Syria, Leba-
non, Egypt and Morocco have received €105 million from their respective governments and €262 million from the EU, and have
assisted about 19,000 SMEs (Ayady, R., Fanelli, A., 2011). This dynamic could be completed by an extension of the Invest in Med
41. Tempus IV runs from 2007-2013, with a budget of approximately €35-39 million per year from the European Neighbourhood
and Partnership Instrument (ENPI), managed by EuropeAid. The Education, Audiovisual and Culture Executive Agency (EACEA)
is responsible for its management.
42. Erasmus Mundus – Action 2 Partnerships is being financed with €29 million through the ENPI budget. It is a cooperation and
mobility scheme funding partnerships between EU and third countries in the field of higher education, through grants. Its target groups
comprise students and academic staff, with particular attention to those in vulnerable situations (e.g., refugees, asylum seekers).
So far, the EMUNI has launched, jointly with partner universities in Italy, Malta, Belgium, Greece, Israel, Lebanon, the UK and Slovenia, four pilot Master Study Programmes and a series of summer schools, doctoral research seminars and international academic conferences. Its mirror institution in the Southern Mediterranean – which, according to the Marseilles Declaration, should be established in Fez (Morocco) – has not yet started its activities.

Higher education and research is also ranked as a priority. Again, more than two thirds of respondents rated it between 8 and 10. Additionally, even if the Southern EMUNI counterpart has not been created yet, the assessment of the progress of this initiative is rather positive: up to 58% of respondents consider that there has been progress. It is the second better evaluated programme, just after the Solar Plan. This could be due to the fact the initiative has already achieved significant visibility through the establishment of its own institution and the expenditures through the TEMPUS and Erasmus Mundus programmes.

2.2.5. Civil Protection Initiatives to Combat Natural and Man-Made Disasters

Cooperation in terms of civil protection in the Euro-Mediterranean field operates within the framework of the PPRD South Programme, which both the Marseilles Declaration and the UfM Secretariat define within the field of reference of civil protection. However, the PPRD is applied under the authority of the European Neighbourhood Policy and, therefore, of European institutions. The UfM emphasises that projects related to civil protection must strengthen cooperation, and encourage development, prevention, mutual assistance and information for stakeholders without exactly specifying its powers in relation to those of the EU. Thus, again, we see the coexistence of several managing institutions with divergent interests.

In relation to the Survey results, the fact that there have been no major Euro-Mediterranean summits on civil protection and that the programmes underway, although active, are mainly developed at a technical level and do not entail large-scale infrastructures means that the visibility of these programmes is limited. This is reflected in the respondents’ answers on this issue. The assessment of its importance in the Euromed objectives, although high, is slightly lower than that of other UfM projects (for further information on natural risks in the PPRD area of influence, see table 6). Moreover, when assessing the progress achieved by this project since 2008, two pieces of relevant data stand out: the low percentage that considers that there has been progress (35% of those who assessed it) and the high percentage of lack of knowledge about it (37% of total respondents are unaware of it). Other aspects seem to be related to the aforementioned poor visibility and are also probably due to the lack of definition itself of the UfM project in comparison with the PPRD, which is much more active and not perceived as belonging to the UfM.

43. The PPRD South Programme, which seeks to contribute to the strengthening of National Civil Protection Services, has projects underway in five areas: assessment tools; prevention and preparedness; response; information and communication and management of programmes related to natural and man-made disasters.
2.2.6. Maritime and Land Highways

The Maritime and Land Highways Initiative, just like the aforementioned plans, was already foreseen in the Paris Declaration. At present, the only conference within the area covered by the Transport and Urban Development Division (TUDD) of the UFM Secretariat is expected to be held in autumn 2011. In accordance with the declaration, the aim of the initiative is to increase and enhance the circulation of people and goods through the construction of safe and secure coastal and maritime motorways as well as to modernise the trans-Maghreb train. The second UFM working group meetings on both Urban Development and transport – which took place on 8th and 30th June 2011 – identified the priority areas of action for the UFM and evaluated possible project proposals.

In a similar fashion to the aforementioned projects, the Maritime and Land Highways are highly ranked in regard to the accomplishment of Euromed objectives (the actual mean is set at around 8). On the subject of progress made, the assessment is slightly less optimistic. Indeed, 65% of those interviewed who actually can evaluate the advancements consider that there has been no progress so far. This proportion is significantly higher than the rest of the projects with the exception of “De-pollution of the Mediterranean Sea” – with 64% – and “Civil Protection

### Table 6: Human and economic exposure to natural hazards of selected southern PPRD beneficiary countries, 2009

<table>
<thead>
<tr>
<th>Hazard type</th>
<th>Cyclone</th>
<th>Drought</th>
<th>Flood</th>
<th>Landslide</th>
<th>Earthquake</th>
<th>Tsunami</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>–</td>
<td>3,763,800</td>
<td>0.12%</td>
<td>26,738</td>
<td>1.75%</td>
<td>3,106,229</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>–</td>
<td>18th</td>
<td>–</td>
<td>–</td>
<td>3.77%</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>58th</td>
<td>48th</td>
<td>18th</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>0.07</td>
<td>0.04</td>
<td>30.12</td>
</tr>
<tr>
<td>Egypt</td>
<td>–</td>
<td>1,123,270</td>
<td>50th</td>
<td>186,346</td>
<td>–</td>
<td>1,116,761</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>1.49%</td>
<td>–</td>
<td>35%</td>
<td>–</td>
<td>1.4%</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>50th</td>
<td>–</td>
<td>–</td>
<td>17th</td>
<td>21st</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>0.33</td>
<td>–</td>
<td>18.00</td>
</tr>
<tr>
<td>Israel</td>
<td>–</td>
<td>358,846</td>
<td>5.18%</td>
<td>3,504</td>
<td>148</td>
<td>21,056</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>82nd</td>
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<td>–</td>
<td>119th</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>0.13</td>
<td>0.02</td>
<td>4.32</td>
</tr>
<tr>
<td>Jordan</td>
<td>–</td>
<td>484,223</td>
<td>8.17%</td>
<td>–</td>
<td>1</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>72nd</td>
<td>–</td>
<td>–</td>
<td>145th</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>0.00</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Lebanon</td>
<td>–</td>
<td>357,885</td>
<td>8.73%</td>
<td>1,274</td>
<td>1,728</td>
<td>22,645</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>83rd</td>
<td>–</td>
<td>140th</td>
<td>49th</td>
<td>9,51%</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>0.01</td>
<td>0.06</td>
<td>93rd</td>
</tr>
<tr>
<td>Lebanon</td>
<td>–</td>
<td>16,29</td>
<td>0.03%</td>
<td>7,506,710</td>
<td>23,478</td>
<td>874</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>24.04%</td>
<td>–</td>
<td>221</td>
<td>83rd out of 153</td>
<td>0.06</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>0.00</td>
<td>39th</td>
<td>66th</td>
<td>70th</td>
<td>63rd</td>
</tr>
<tr>
<td>Morocco</td>
<td>16,29</td>
<td>7,506,710</td>
<td>7.7%</td>
<td>23,478</td>
<td>874</td>
<td>73,001</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>20.04%</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>10th</td>
<td>0.03%</td>
<td>66th</td>
<td>70th</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>0.00</td>
<td>0.01%</td>
<td>0.07</td>
<td>0.01</td>
<td>0.99</td>
</tr>
<tr>
<td>Occupied</td>
<td>221</td>
<td>260,362</td>
<td>6.48%</td>
<td>221</td>
<td>–</td>
<td>31,063</td>
</tr>
<tr>
<td>Occupied</td>
<td>–</td>
<td>93rd</td>
<td>3.9%</td>
<td>154th</td>
<td>–</td>
<td>83rd out of 153</td>
</tr>
<tr>
<td>Occupied</td>
<td>–</td>
<td>0.00</td>
<td>0.00%</td>
<td>0.00</td>
<td>0.00</td>
<td>–</td>
</tr>
<tr>
<td>Palestinian Territory</td>
<td>31,063</td>
<td>108</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Syria</td>
<td>–</td>
<td>2,072,540</td>
<td>10.4%</td>
<td>25,572</td>
<td>456</td>
<td>5,37</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>35th</td>
<td>10.4%</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>62nd</td>
<td>8th</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>0.03</td>
<td>0.01%</td>
<td>0.01</td>
<td>0.01</td>
<td>0.14</td>
</tr>
<tr>
<td>Tunisia</td>
<td>–</td>
<td>782,061</td>
<td>7.5%</td>
<td>3,478</td>
<td>68</td>
<td>2</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>56th</td>
<td>3.7%</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>116th</td>
<td>11.9%</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>0.01</td>
<td>0.01%</td>
<td>0.00</td>
<td>0.00</td>
<td>–</td>
</tr>
<tr>
<td>Turkey</td>
<td>–</td>
<td>4,054,870</td>
<td>5.4%</td>
<td>82,886</td>
<td>6,378</td>
<td>21,552,33</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>16th</td>
<td>3.5%</td>
<td>–</td>
<td>–</td>
<td>2.78%</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>39nd</td>
<td>30th</td>
<td>–</td>
<td>13th</td>
<td>–</td>
</tr>
<tr>
<td>–</td>
<td>–</td>
<td>0.32</td>
<td>0.17%</td>
<td>0.32</td>
<td>0.17</td>
<td>57.43</td>
</tr>
</tbody>
</table>

Legend: country: Population exposed
Country ranking on Human Exposure (worldwide)**
% GDP exposed (billions-US$)**

Note: *Modeled number of people present in hazard zones that are thereby subject to potential losses
**Cyclone (out of 89 countries), drought (out of 184 countries), flood (out of 162), earthquake (out of 153), tsunami (out of 76)
***Modeled amount of GDP (Gross Domestic Product) present in hazard zones that are thereby subject to potential losses
Source: Compiled by the IEMed based on the 2009 Global Assessment Report
Initiatives to Combat Natural and Man-Made Disasters” – with 59%. It is important to note that it was not until 29th April that Mr Yigit Alpogan was appointed Deputy Secretary General for Transport and Urban Development and not until 15th September 2010 that he finally joined his Barcelona Office. The short time that passed between him joining his Office and the Euromed Survey field works – October/December 2010 – can partially explain those results, as the promotion of concrete projects had not yet been started.

III. Final Considerations

The 2nd IEMed Survey of Experts and Actors clearly shows that many EMP/UfM endeavours are largely unknown even to experts on Euro-Mediterranean policies and politics. Those who are aware of their existence consider them to be very important to the accomplishment of Euromed objectives. Nonetheless, when asked to match their aspirations with the actual progresses in the field, disappointment emerges. Indeed, few experts consider that there has been actual progress in relation to EMP/UfM projects and programmes. This poor performance originated in the proliferation of regional structures, fragmentation of programmes, as well as institutional blockages caused by stagnant political conflicts in the area and lack of financial commitment from the EMP/UfM partners. The lack of a serious effort to assess the effectiveness of the assistance granted through the main cooperation schemes also needs to be considered, as experts, practitioners and decisions-makers cannot easily redeem their ideas and practices.

Therefore, a rationalisation of Euro-Mediterranean cooperation structures must be considered in the future. At present, there is a need to scale down rhetoric in order to surmount the expectations-performance gap. In this respect, temptations towards macro-objectives that cannot be realistically achieved within the current political and economic context must be abandoned as magnifying the objectives not only jeopardises the accomplishment of the programmes but also spreads disappointment among experts and local stakeholders.

Moreover, there is a need to review the priorities for the cooperation agenda. As the Euromed Survey has shown, criticisms are mainly addressed to performance regardless of the field of cooperation concerned. As some authors in this collection of papers have emphasised, it seems that, prior to the civic upheavals, there has been a disconnection between the priorities set by the highest authorities and the real needs of the populations and territories (for further information, see Annie Cordet’s and Dorothée Schmitt’s documents). Indeed, few respondents questioned the way the agenda had significantly and recurrently neglected not only occupation and employability activities but also youth and mobility within the EMP/UfM frameworks.

In this respect, the political upheavals and revolutions that are currently taking place in the Southern Mediterranean will surely have a significant effect on cooperation agendas. Hopefully, the instauration of democratic regimes will support the transition of the EMP and UfM not only towards a more rationalised system but also towards a fairer one, which would ideally be more receptive to what is truly important rather than what is merely interesting.

Regardless of the potential changes that the new regimes could have over the already existing institutions, it is also crucial to consider the role that both institutions may have in the success or failure of the political and economic reforms in the Southern Mediterranean. Uncertainty and fragility are the most pressing challenges to be faced by the new regimes. In this context, the EU External Action’s long-sustained preference for the preservation of stability in the region at
the expense of democracy and human rights is no longer morally or economically sustainable in its Southern Neighbourhood. The launching of, firstly, the “Partnership for Democracy and Shared Prosperity with the Southern Mediterranean” on 3rd March and, subsequently, of “A New Response to a Changing Neighbourhood” on 25th May seem to have incorporated the lessons drawn from the demands of the population.45

Obviously, those changes will mostly rely on partners’ commitment to the region. In the case of the UfM, its success will mostly depend on their commitment to the projects designed by the Secretariat. Nonetheless, the persistent and growing asymmetries within the Euro-Mediterranean area, along with the revival of stagnated conflicts, made such commitments very complicated. In contrast, European policies in the Mediterranean, due to their bilateral nature, are not as sensitive to political conflict as to their own dependency on a rationale that has long given priority to stability and growth in macro-economic terms in spite of social development.

Over the last few months we have witnessed the most extraordinary political changes in North African and Middle Eastern nations since they achieved independence. The result of the call for freedom and self-determination swings now from democratic consolidation to involution towards more repressive regimes. Now it is time for the EU and the UfM to be worthy of this historical moment.

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45 The next round of the IEMed’s Survey – expected for 2012 – is intended to analyse the future EMP outcomes and demands in this respect.
### Summary Chart on EMP / UfM Action Plans and Sectoral Strategies, 2007-2011

<table>
<thead>
<tr>
<th>Priorities</th>
<th>Expert’s Assessment of Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mediterranean Water Strategy</strong> (to be approved)</td>
<td><img src="image" alt="Assessment of Mediterranean Water Strategy" /></td>
</tr>
<tr>
<td><strong>Objectives and priorities:</strong> To conserve water quality and to balance quantity of used and available water to achieve regional sustainable economic growth, social prosperity, access to water for all and environmental protection and rehabilitation.</td>
<td><strong>Awareness rate:</strong> 56% / <strong>Importance for Euromed Objectives:</strong> 8.27</td>
</tr>
<tr>
<td><strong>Legal framework:</strong> The Mediterranean Water Strategy was intended to be adopted during the 4th Euro-Mediterranean Ministerial Conference on Water. Unfortunately, no agreement was reached.</td>
<td><strong>Progress</strong></td>
</tr>
</tbody>
</table>

| **Employment Framework of Actions** (adopted in November 2008)           | ![Assessment of Employment Framework of Actions](image) |
| **Objectives and priorities:** Create more jobs, enhance employability and generate decent work. | **Awareness rate:** 61% / **Importance for Euromed Objectives:** 7.62 |
| **Legal framework:** Established at the 1st Euro-Mediterranean Employment and Labour Ministers Conference in 2008. | **Progress** | **No progress** | **Regression** |

| **Mediterranean Maritime Strategy** (announced in the Marseilles Declaration 2008) | ![Assessment of Mediterranean Maritime Strategy](image) |
| **Objectives and priorities:** The specificities of the Mediterranean Sea basin and the increasingly trans-boundary nature of maritime activities and related impacts, call for a joint effort to improve maritime governance in the basin. | **Awareness rate:** 54% / **Importance for Euromed Objectives:** 7.36 |
| **Legal framework:** Announced in the Marseilles Declaration and then resumed by Communication from the Commission to the Council and the European Parliament "Towards an Integrated Maritime Policy for better governance in the Mediterranean". | **Progress** | **No progress** | **Regression** |

| **Euro-Mediterranean Industrial Cooperation 2009-2010** (Working Programme) | ![Assessment of Euro-Mediterranean Industrial Cooperation 2009-2010](image) |
| **Objectives and priorities:** Aims to bring industrial policy on both sides of the Mediterranean closer together in order to help business to go international (help them to trade, invest and engage in partnerships at Euro-Mediterranean level). | **Awareness rate:** 59% / **Importance for Euromed Objectives:** 7.43 |
| **Legal framework:** Euro-Mediterranean industrial cooperation 2009-2010 work programme was developed by the services of the European Commission in consultation with the Working Party on Euro-Mediterranean industrial cooperation and, then, galvanized by the 7th Euro-Mediterranean ministerial meeting on industrial cooperation, 2008. | **Progress** | **No progress** | **Regression** |

| **Working Programme on Tourism** (announced in April 2008) | ![Assessment of Working Programme on Tourism](image) |
| **Objectives and priorities:** Cooperate to enhance the impact of tourism on job creation, infrastructure development and inter-cultural understanding while ensuring environmental sustainability. | **Awareness rate:** 58% / **Importance for Euromed Objectives:** 7.06 |
| **Legal framework:** Announced in 2008 and 2010 Euro-Ministerial Conferences has never been finally drafted. | **Progress** | **No progress** | **Regression** |
### Actual progress achieved

<table>
<thead>
<tr>
<th>Ministerial Conferences</th>
<th>Main Projects / Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>3rd Euro-Mediterranean Ministerial Conference on Water</strong></td>
<td>In this field, neither regional projects nor budget allocation have been executed so far.</td>
</tr>
</tbody>
</table>
| **4th Euro-Mediterranean Ministerial Conference on Water, 2010** | Related activities:  
  - Water Expert group meetings within the UfM  
  - EU activities related to water in the MENA area:  
    - EMWSIS – Water sector cooperation (2004-2008): €3.3 million (€2 million MEDA, €13 million Spain, Italy and France)  
    - MEDA WATER (2003-2008): €40 million (MEDA)  
    - Sustainable Water Management and De-pollution of the Mediterranean (2009-2013): 22 million  
    - SAFEMED II – Maritime Safety and Pollution Prevention (2009-2011): €5.5 million  
    - Invest in Med related activities: Med Water – Addressing Med water challenges |
| **1st Euro-Med Employment and Labour Ministers Conference, 2008** | In this field, neither significant regional projects nor significant budget allocation have been executed for the indicated period.                                                                                             |
| **2nd Euro-Med Employment and Labour Ministers Conference, 2010** | Related activities:  
  - Euro-med Employment and Labour Working Group  
  - Euro-Med Social Dialogue Forum  
  - EU activities related to employment in the MEDA area:  
| **1st meeting of the Union for the Mediterranean-Euromed Social Dialogue Forum March 2010.** | In this field, neither regional projects nor budget allocation have been executed so far. For a list of country-based projects please see. List of activities implemented.  |
| **7th Euro-Mediterranean ministerial meeting on industrial cooperation, 2008.** | **List of implemented actions 2009-2011**  
  - The Working Party on Euro-Mediterranean Industrial Cooperation coordinates industrial cooperation activities and monitors implementation of the work programme |
| **8th Euro-Mediterranean ministerial meeting on industrial cooperation, 2011, Malta** | In this field, no specific regional projects on Tourism have been executed so far.  
  - EU related activities:  
    - “Agenda for a sustainable and competitive European tourism, 2007” intends to involve MPCs in the EC tourism-related activities  
    - FEMIP activities related to Tourism  
    - “Invest in Med” regional related to tourism: Euromediterranean Tourist Investment Network (ETINET) and BEST-MED Business Eco-Sustainable Tourism in the Mediterranean area |
| **1st Euro-Mediterranean Ministerial Conference, 2008** |                                                                                                                                                                                                                           |
| **2nd Euro-Mediterranean Ministerial Conference on Tourism, 2010** |                                                                                                                                                                                                                           |
### Priorities

<table>
<thead>
<tr>
<th>Priority</th>
<th>Expert's Assessment of Progress</th>
</tr>
</thead>
</table>
| **2008-2013 Priority Action Plan on Energy**<br>(adopted in December 2007) | ![Progress ▀ No progress ▄ Regression](images/progress.png)  
Awareness rate: 64% / Importance for Euromed Objectives: 7.91 |
| **Regional Transport Action Plan for the Mediterranean**<br>(adopted in May 2007) | ![Progress ▀ No progress ▄ Regression](images/progress.png)  
Awareness rate: 58% / Importance for Euromed Objectives: 7.44 |
| **Istanbul Action Plan on Strengthening the Role of Women in Society**<br>(adopted in November 2006) | ![Progress ▀ No progress ▄ Regression](images/progress.png)  
Awareness rate: 64% / Importance for Euromed Objectives: 7.21 |

### Legal framework:

- **Ministerial Declaration on The Euro-Mediterranean Energy Partnership**<br>Adopted Together with its Annexes by Ministers at the Conference in Limassol, Cyprus on 17 December 2007
- **Regional Transport Action Plan (RTAP) for the period 2007-2013**<br>was solicited by the 1st Euro-Mediterranean Conference of Transport Ministers to the Euro-Mediterranean Transport Forum
- **Adopted in Euro-Mediterranean Ministerial Conference held in Istanbul on 14-15, November 2006.**

### Objectives and priorities:

- Ensuring the improved harmonization of energy markets and legislations and pursuing the integration of energy markets in the Euro-Mediterranean region
- Promoting sustainable development in the energy sector
- Developing initiatives of common interest in key areas, such as infrastructure extension, investment financing and research and development
- Intensify cooperation with and within the Mediterranean region in different transport sectors (maritime, road, railways and civil aviation) and target mainly regulatory (institutional) reform and infrastructure network planning and implementation
- Women’s political and civil rights enforcement
- Women’s social and economic rights enforcement and sustainable development policies
- Women’s rights in the cultural sphere and the role of communications and the mass media

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Source: Compiled by IEMed based on the results of the 2nd Euromed Survey
### Actual progress achieved

<table>
<thead>
<tr>
<th>Ministerial Conferences</th>
<th>Main Projects / Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2nd Ministerial Conference on Strengthening the Role of Women in Society (November 2009)</strong></td>
<td></td>
</tr>
</tbody>
</table>
## Summary Chart on UfM Flagship Initiatives, 2008-2011

<table>
<thead>
<tr>
<th>Background</th>
<th>Expert’s Assessment of Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>De-pollution of the Mediterranean Sea</strong></td>
<td><img src="chart" alt="Progress, No progress, Regression" /></td>
</tr>
<tr>
<td>The UfM projects in the environment sector will contribute directly to the implementation of the Horizon 2020 Initiative to De-Pollute the Mediterranean.</td>
<td>Awareness rate: 61% / Importance for Euromed Objectives: 8</td>
</tr>
<tr>
<td><strong>Maritime and land highways</strong></td>
<td><img src="chart" alt="Progress, No progress, Regression" /></td>
</tr>
<tr>
<td>These projects aim to increase the flow and freedom of the movement of people and goods through the development of motorways of the sea, including the connection of ports, as well as the creation of coastal motorways and the modernisation of the trans-Maghreb train.</td>
<td>Awareness rate: 60% / Importance for Euromed Objectives: 7.46</td>
</tr>
<tr>
<td><strong>Civil protection initiatives to combat natural and man-made disasters</strong></td>
<td><img src="chart" alt="Progress, No progress, Regression" /></td>
</tr>
<tr>
<td>Civil protection projects envisage the strengthening of cooperation, aimed at providing support to the development, prevention, training, mutual assistance and information to all stakeholders. With the individual as its main focus, the Union for the Mediterranean will, via the implementation of these projects, seek to secure the support of citizens for these projects.</td>
<td>Awareness rate: 63% / Importance for Euromed Objectives: 7.75</td>
</tr>
<tr>
<td><strong>Alternative energies: Mediterranean Solar Plan</strong></td>
<td><img src="chart" alt="Progress, No progress, Regression" /></td>
</tr>
<tr>
<td>Mediterranean Solar Plan (MSP) is a flagship UfM initiative aiming at promoting renewable energies and energy efficiency in UfM countries. One key target is the deployment of an additional 20 GW of renewable energy capacities by 2020.</td>
<td>Awareness rate: 72% / Importance for Euromed Objectives: 8.21</td>
</tr>
<tr>
<td>Division: Environment and Water</td>
<td>Conferences and follow-up in regards to the initiatives</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Deputy Secretary General:</td>
<td>In this field, neither specific project nor budget allocation has been executed so far.</td>
</tr>
<tr>
<td>Dr. Rafiq Hussein</td>
<td><strong>UfM related activities:</strong></td>
</tr>
<tr>
<td></td>
<td>Water Expert Group (WEG) of the Union for the Mediterranean</td>
</tr>
<tr>
<td><strong>EMP related activities:</strong></td>
<td>• Sustainable Water Management and De-pollution of the Mediterranean (EMP regional programme)</td>
</tr>
<tr>
<td></td>
<td>• Horizon 2020: Hot Spots Investment Programme (MeHSIP-PPIF); Shared Environmental Information System (ENFI-SEIS); Capacity Building/Mediterranean Environment Programme (H2020 CB/MEP)</td>
</tr>
<tr>
<td><strong>UN related activities:</strong></td>
<td>• Blue Plan by United Nations Environment Programme</td>
</tr>
<tr>
<td>• Appointment:</td>
<td></td>
</tr>
<tr>
<td>• Incorporation to Secretary Headquarters:</td>
<td></td>
</tr>
<tr>
<td>15th September 2010</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Division: Transport and Urban Development</th>
<th>Conferences and follow-up in regards to the initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deputy Secretary General:</td>
<td>In this field, neither specific project nor budget allocation has been executed so far.</td>
</tr>
<tr>
<td>Mr. Yigit Alpogan</td>
<td><strong>UfM related activities:</strong></td>
</tr>
<tr>
<td></td>
<td>II UfM Working Group Meeting on Urban Development and Transport</td>
</tr>
<tr>
<td><strong>EMP related activities:</strong></td>
<td>• Regional Transport Action Plan (RTAP) for the period 2007-2013 coordinated by Euromed Transport Project</td>
</tr>
<tr>
<td></td>
<td>• FEMIP activities related to transport</td>
</tr>
<tr>
<td>• Appointment:</td>
<td></td>
</tr>
<tr>
<td>• Incorporation to Secretary Headquarters:</td>
<td></td>
</tr>
<tr>
<td>29th April 2010</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Division: Social and Civil Affairs</th>
<th>Conferences and follow-up in regards to the initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deputy Secretary General:</td>
<td>In this field, neither specific project nor budget allocation has been executed so far.</td>
</tr>
<tr>
<td>Ms. Cecilia Attard-Pirotta</td>
<td><strong>UfM related activities:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>EMP related activities:</strong></td>
<td>• Euro-Mediterranean Programme on Prevention, Preparedness and Response to Natural and Man-Made Disasters</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>• Appointment:</td>
<td></td>
</tr>
<tr>
<td>• Incorporation to Secretary Headquarters:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Division: Energy</th>
<th>Conferences and follow-up in regards to the initiatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deputy Secretary General:</td>
<td>In this field, neither specific project nor budget allocation has been executed so far.</td>
</tr>
<tr>
<td></td>
<td><strong>UfM related activities:</strong></td>
</tr>
<tr>
<td>• Appointment:</td>
<td>1st Joint Committee of National Experts for the Mediterranean Solar Plan</td>
</tr>
<tr>
<td>• Incorporation to Secretary Headquarters:</td>
<td>Member states’ energy experts for the MSP</td>
</tr>
<tr>
<td></td>
<td><strong>EMP related activities:</strong></td>
</tr>
<tr>
<td></td>
<td>• FEMIP projects related to energy</td>
</tr>
<tr>
<td></td>
<td>• Invest in Med activities related to renewable energies</td>
</tr>
<tr>
<td>(Med Energy - Development of renewable energies and Sun for Med-Sustainability)</td>
<td></td>
</tr>
<tr>
<td>Background</td>
<td>Expert's Assessment of Progress</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Higher Education and Research, Euro-Mediterranean University in Slovenia and Fez</strong></td>
<td><strong>Higher Education and Research, Euro-Mediterranean University in Slovenia and Fez</strong></td>
</tr>
</tbody>
</table>
| The programme aims to set up a *Euro Mediterranean University (EMUNI)*, which will develop postgraduate and research programmes and will help to contribute to the establishment of the *Euro-Mediterranean Higher Education, Science and Research Area*. | ![Progress, No progress, Regression](image)

Awareness rate: 66% / Importance for Euromed Objectives: 7.87 |

<table>
<thead>
<tr>
<th><strong>Mediterranean Business Development Initiative focusing on Micro and SMEs</strong></th>
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</tr>
</thead>
</table>
| The Mediterranean Business Development Initiative is the UFM project aimed at assisting the existing entities in partner countries operating in support of micro, small- and medium-sized enterprises by assessing the needs of these enterprises, defining policy solutions and providing these entities with resources in the form of technical assistance and financial instruments. Its activities are expected to be complementary to those of the existing entities working in the field. | ![Progress, No progress, Regression](image)

Awareness rate: 66% / Importance for Euromed Objectives: 7.98 |

Source: Compiled by IEMed based on the results of the 2nd Euromed Survey
| Division: Higher Education and Research | In this field, neither specific project nor budget allocation has been executed so far. EMP related activities:  
- 1st Euro-Mediterranean Ministerial Conference on Higher Education and Scientific Research, Cairo  
- Erasmus Mundus II – Action 2 Partnerships (2009-2010): €29 million  
| Deputy Secretary General: **Prof. Ilan Chet**  
- Appointment:  
- Incorporation to Secretary Headquarters: |

| Division: Projects Funding Coordination and Business Development | In this field, neither specific project nor budget allocation has been executed so far. EMP related activities:  
- FEMIP activities related to SMEs  
- Euro-Mediterranean Charter for Enterprise  
- Invest in Med activities regarding reinforcing organisations’ capacity in supporting SME development |
| Deputy Secretary General: **Dr. Lino Cardarelli**  
- Appointment:  
- Incorporation to Secretary Headquarters: |
TRANSITION IN THE SOUTHERN MEDITERRANEAN: AN OPPORTUNITY FOR IMPROVED COOPERATION BETWEEN THE TWO SHORES?

ANNIE CORDET-DUPOUY
Senior Partner. Sabaudia Consulting

“Ignoranti quem portus petat nullus ventus suus est”
(There is no favourable wind for he who knows not where he is heading.)
Seneca

The following thoughts on changes taking place in the Southern Mediterranean bring to mind, in some aspects, the transition of Central European countries in the early 90s. Indeed, they echo the introduction to an article which I wrote with V. Falcoz in 1998. The countries on the southern shore of the Mediterranean, itself an internal sea and trade route, have been subjected for decades to authoritarian (and in some cases dictatorial) systems, but are now in the process of a commitment to democratic models, albeit with transitional periods which are still uncertain for a number of them. With objectives which may be idealised, confused or feared, these countries have only a vague idea of the port to which they are headed; this mysteriously-shaped port is variously described by such words as “democracy”, “dignity” or a “reformed market economy”. As for favourable winds, these countries, however nautical, struggle to find them, steering them strongly towards the expectation of assistance from all those beyond their borders who were waiting and hoping for such changes. But nobody had really foreseen these changes, these breaks, either within the southern nations or those to the north.

Is it possible to think of a break, feel it as possible, but without knowing when or how to expect it? Few economists (or sociologists) have addressed this issue. The failure to foresee the 2008 financial and economic crisis had already raised a number of questions, and Nassim N. Taieb’s book, Black Swan contributed for the first time an original analysis of the extreme difficulty, even for experts, in anticipating upheavals. Ryszard Kapuscinski, the journalist who covered countries undergoing revolution, has “recorded” and analysed a large number of them in emerging countries. In the last chapter of his book on the fall of the Shah (The Shah), he lists several countries where the political, economic and social situation has reached a pre-revolutionary stage, without knowing, however, when these revolutions will occur. What is it that will ignite the spark?

It is therefore particularly worthwhile studying the responses to the 2010 IEMed Survey, replies that were given in an environment which could be described as pre-revolutionary in the light of events in the Southern Mediterranean since the beginning of 2011. And in examining the results, either generally or specifically, practically nothing stands out as particularly remarkable, no notable departure in comparison to the results from the 2009 Survey, with in some cases even more optimistic comments. Only a handful of respondents revealed greater concerns and surprisingly, they were mostly women. Is that because of feminine intuition or higher female unemployment?

My analysis centres on the Euro-Mediterranean Partnership/Union for the Mediterranean, as observed through the Survey (of which a quantitative breakdown is shown elsewhere in this
TRANSITION IN THE SOUTHERN
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My analysis centres on the Euro-Mediterranean Partnership/Union for the Mediterranean, as observed through the Survey (of which a quantitative breakdown is shown elsewhere in this
A few months after the start of the revolutions we now seek (i) to understand better why the experts, and other professionals surveyed, saw nothing and what factors should have alerted them and us, (ii) to identify what foreign aid the Southern Mediterranean countries need to succeed in their transition and (iii) what are the challenges for the Euro-Mediterranean Partnership and, ultimately, for the Union for the Mediterranean. Certain points that were raised will certainly merit in-depth analysis in another context, allowing lessons to be learned upon which to build a more comprehensive policy for Mediterranean cooperation.

I. A Strong Disconnect Emerges Between Popular Expectation and the Views of Politicians and Experts

Over the years, many political leaders shut their eyes to the nature of existing regimes so long as they brought stability in the struggle against Islamism. Economists and donors essentially relied on economic growth, leading to an improved standard of living, overlooking the fact that the “bad” redistribution of wealth was associated with a growth of inequality. To a large extent, the survey responses reflect these positions, a source of the disconnect between popular expectations and the priorities of the elites.

1.1. A Lack of Attention, or Turning a Blind Eye, to Socio-Political Realities so Long as Economic Progress is Under Way (According to Statistical Measures)

The survey, which poses, in a restrained and politically-correct way, the question of the endurance of political regimes (question B.14.B), would have benefited from being more explicit about this point to elicit a more clear-cut response. More specific questions could also have been asked on the autocracy of various regimes, increases in inequality (visible in analysing the evolution of Gini coefficients), the importance of social issues and the demographic bulge brought out by the fact that 40% or more of the population of these countries are under 20 (see Table 1 below).

Table 1: Percentage of population aged under 20

<table>
<thead>
<tr>
<th>Southern Mediterranean</th>
<th>For comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria 37%</td>
<td>France 24%</td>
</tr>
<tr>
<td>Egypt 42%</td>
<td>Italy 19%</td>
</tr>
<tr>
<td>Morocco 38%</td>
<td>Russia 21%</td>
</tr>
<tr>
<td>Syria 45%</td>
<td>USA 27%</td>
</tr>
<tr>
<td>Tunisia 39%</td>
<td>–</td>
</tr>
<tr>
<td>Turkey 36%</td>
<td>–</td>
</tr>
</tbody>
</table>

Table Source: World Bank 2009

Education, albeit with very mediocre quality, has made great strides in these countries, and illiteracy has fallen dramatically over the last 20 years. However, young people have no hope for the future nor any confidence in their governments and officialdom. Given this context, the only possible solution is emigration. As for the integration of women into the economy, it is among the weakest among emerging nations.

1. This is not an attempt to explain revolutions, but just an analysis of economic or political aspects often overlooked in the course of working on cooperation that might serve as a basis for the future.

2. The Gini index (or coefficient) is a combined indicator of earnings inequalities (income, standard of living...). It ranges from 0 to 1. It is worth 0 where a situation exists in which all earnings, income, standards of living... were perfectly equal. At the other extreme, it is worth 1 in the most unequal situation possible, in which all earnings (income, standards of living...) but one were zero. Between 0 and 1, inequality is greater the higher the Gini index. A drop in the Gini index noted between dates indicates an overall reduction in inequality. Conversely, a rise in the index reflects an overall increase in inequality. Source: INSEE, France.
These questions, which were not clearly addressed in the Survey, were not raised or clarified during the cooperation negotiations, even if it may have been at the back of the minds of many. And if business creation has been at the centre of many cooperation programmes, modernisation and enhanced competitiveness programmes focused on one aspect, competitiveness, but they have overlooked the fact that unless competition is combined with social and employment-creating programmes, it only increases social malaise.

1.2. A positive and Stronger Assessment of Political Continuity than in 2009

According to the questionnaire responses, all people sampled for this survey, from both the South and North, thought that the existing regimes would endure, but their perception of permanence (one cannot speak of evaluation) was even stronger in 2010 than in 2009 (question B.14.B on the continuity of political regimes).

Graph 1: Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Political regimes in MPCs will show a high degree of continuity (%)

Only two or three responses (by women from the Southern Mediterranean) mention in the free-text comments that “the absence of political reforms put a brake/block on economic and social development, whatever the amount of aid received,” that “tolerance by the EU towards (non-) promotion of democracy and women’s roles and mobility will decrease,” and that “dictatorship in the South erodes progress.” It is possible that this impression of being before an impregnable social and political barrier, combined with a loss of dignity, was what provided the spark in Tunisia. It will no doubt become the subject of investigation by many academics and economists as well as sociologists and politicians. Tunisians were telling me recently “one can accept being robbed, but not being trampled underfoot.” This comment encapsulates the despair that inspired early demonstrations in Tunisia.

One may also speculate on the refusals to reply even to an “anonymous” survey on the part of respondents in the South, although the attempted internet blackouts during the uprisings show that such a fear was no doubt justified. And what about respondents in the North? Probably they underestimated the extent to which authoritarian pressure had reached unbearable limits for young people in the South, or forgot that life in those countries was not as “easy-going” or “open” as that which they might have observed looking out from the windows of their grand hotels.
1.3. The Measurement of Progress as a Basis for Producing Aid Programmes, Was Based Primarily on Certain Macroeconomic Figures and on Data Which Was Not Always Reliable

Overall GDP, progress in “Doing Business”, the volume of FDI (Foreign Direct Investments) and the total level of unemployment were regarded as the primary indicators of progress. The long-term aim of European aid programmes was “convergence” between the northern and southern economies, a convergence measured essentially with one macroeconomic indicator, per capita GDP. Some respondents were able to see that it was not sufficient. For instance, “GDP is not the sole indicator and attention to Gini coefficients and redistribution would be a better measure of progress.” Another question: “What is meant by convergence and measure of progress?” And a final one (there was very little questioning) poses the well-aimed question on the “Comparison between Morocco and Algeria on GDP and quality of life; is Algerian GDP, double Morocco’s, a good indicator?” This simple comparison clearly indicates that a definition of convergence must look beyond per capita GDP figures. The European Union, while giving no explanation, was certainly aware of this aspect in its analysis prior to the decision to grant Morocco “advanced status” in 2008, while that status was refused to Tunisia at the same time (to the fury of its government which had even announced that it had obtained the status in 2009). All the donors and economists have for many years been questioning the validity of unemployment and inflation data to reflect reality, and have attempted to correct them, with mixed success.

In light of so many putative emigrants and hordes of “harragas” attempting to enter Europe, how can one believe in the published figures and in progress on convergence?

Table 2: Unemployed population as a percentage of active population

<table>
<thead>
<tr>
<th>Country</th>
<th>Unemployment Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>11.30%</td>
</tr>
<tr>
<td>Egypt</td>
<td>8.70%</td>
</tr>
<tr>
<td>Morocco</td>
<td>9.60%</td>
</tr>
<tr>
<td>Syria</td>
<td>n.a.</td>
</tr>
<tr>
<td>Tunisia</td>
<td>14.20%</td>
</tr>
<tr>
<td>Turkey</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: World Bank 2008

Unemployment figures (see Table 2) — based on official statistics — represent national averages, but there can be very different (and much higher) rates in certain regions (inland) or segments of the population (young graduates). Unemployment among these young people, including specifically university graduates, probably sits at around 30% and is sometimes higher in the more disadvantaged regions. However, the majority of published official statistics are hard to interpret. Even if the figures are not accurate, the dramatic rise in unemployment among young people with diploma between 2005 and 2010 appears in the official statistics of various countries. For example, in Tunisia, while the overall unemployment figures went from 12.9% to 13% between 2005 and 2010, unemployment for those with lower educational achievement fell or stabilised, while unemployment among the better educated almost doubled, going from 14% (in other words roughly within the average) to 22.9% over the same period.

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3. Harraga: word of Maghreb Arabic origin - “burners” (of ID); illegal migrants who take to the sea from North Africa, Mauritania, Senegal in “patena” boats (boat people).
The problem does not reside necessarily in the gathering of data, but in the way it is aggregated, analysed and interpreted as well as the non-publication of “unsatisfactory” data. A huge amount of work is therefore required, perhaps starting from scratch, to come up with a realistic view of the situation and a solution which will target programmes to remedy weak points.

1.4. Southern Mediterranean Countries Have Favoured Export Strategies and Attracting FDI is Geared Towards Exports
The choice of economic models and their impact on development was not addressed in the Survey, nor addressed by the respondents. All the same, it would certainly appear to contribute to the cumulative impoverishment of specific geographical areas, or of those social groups which were among the instigators of the revolutions. Without going into detail, the majority of countries, with the support of donors, have favoured export strategies, to the detriment of strategies aimed at the domestic market and regional development, thereby leaving them vulnerable to external shocks, and a breeding ground for home-grown dissatisfaction among their citizens.

Currently these countries are essentially exporters of

- Commodities (oil, gas, phosphates...)
- Subcontracted manufacturing (textile, automotive equipment, etc.)
- People (emigrants to many regions)
- Services (tourism, financial services, transport, etc.)

Up to now, such exports have been directed primarily outside the Southern Mediterranean region toward Europe and the rest of the world. This is especially true for Tunisia, which has, as a result, been more seriously affected than others by the world economic crisis. Taking all countries together, this problem is currently accentuated by price rises for basic agricultural products, which has a greater impact on the purchasing power of the less-privileged segments of the population, a class often more significant than official statistics would allow (see previous comments).

In closing, it is also worth noting that there is hardly any significant trade among the various Southern Mediterranean nations notwithstanding the Agadir Agreement.

1.5. Emigration, the Principal Source of Comments in the Survey
Questions on emigration were greatly elaborated on by respondents from both South and North. These aspects are addressed in the final questions of section B.14. and in the open-ended comments.
Graph 2: Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean under the present level and framework of cooperation

(average on a scale of 0-10, where 0 stands for low probability, and 10 for very high probability)

- Population and employment pressures in MPCs will intensify and create dramatic social tensions
- Irregular migration from originating MPCs to Europe will continue to increase whatever control mechanisms the EU may impose
- Free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean
- Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe
- The increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

All the open-ended comments mention the importance of the ongoing emigration phenomenon, and the problem of acceptance by European countries. It is interesting to observe that, while respondents note (even more so than in 2009) that high levels of emigration risk creating social problems and xenophobia in Europe (reply to question B.14.L), they do not believe extensively that this exodus could, in great measures, lead to political reforms.

Graph 3: Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe

(average on a scale of 0-10)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
Open-ended comments from the North were highly variable, some leaning toward a position of openness while others demanded firmer policies, as current policies were deemed ineffectual. Specific comments were made on the excessive populations in certain countries, but without relating them specifically to mass youth unemployment and emigration.

One point was not really addressed either at the level of the Survey or open-ended comments, even though it is at the heart of the current revolutions, namely that of mass unemployment of young graduates and mass unemployment in the poorest regions (interior of Tunisia, South of Egypt, South of Algeria, interior of Morocco, etc.). This problem, hidden both in published statistics and at a qualitative and political level, was surely one of the sparks of the revolutions.

Graph 4: Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Population and employment pressures in MPCS will intensify and create dramatic social tensions (%)

1.6. Revolutions Instigated by Young People Who Are No Longer Afraid

Contrary to the fears which were around in political and populist circles in the North and among the intelligentsia, the revolutions were not started by Islamists, but rather have been prompted by middle-class youth with socio-cultural demands for dignity, employment, a better standard of living and the elimination of corruption, although the risk still exists that these demands might be hijacked. The “revolutions” or discontent are different from one country to the next, but they do have certain things in common:

- Young people have nothing to lose, having lost hope; humiliation and lack of future prospects are the common lot
- The internet, mobile phones and Al Jazeera TV were a major catalyst and played an information-sharing role
- There is a total absence of clear alternative solutions

The installation of new governments and new economic and social policies as well as the democratic learning process will doubtless be slow, perhaps excessively so for young people. This period of uncertainty, combined with increased insecurity (street justice returning following the throwing open of prison doors) might create a further risk of usurpation by undemocratic forces, religious extremists or the Army.

During a period of confusion, where controls are weak, illegal emigration increases, whether by the “usual suspects” who were just waiting for the opportunity, or by new candidates (for instance ex-members of the security services or the police).
We have not noted any explicit indication in the Survey or the responses (possibly because the official figures were lacking) of a more specific social malaise and youth unemployment. Just one respondent speaks of a “greater risk associated with a social deprivation and with conflicts.” The response in 2010 to question B.14.I which deals with unemployment and dramatic risks from social tensions was even slightly more optimistic than that in 2009 (see Graph B14.I above).

This broader response did not reflect any major fear in contrast to the reality on the ground.

1.7. Aid Policies From the Northern Mediterranean Countries Have Had a Limited Impact

Aid policies from the Northern Mediterranean Countries has been characterised by major support from the European Union (notably through EuropeAid and the EIB), and by specific programmes from a number of countries, in particular France, Germany and Italy. These programmes, however, have evolved over recent years and have suffered from:

- a lack of consensus among donors: divergent or uncoordinated strategies for budget support, and technical assistance; as well as regional strategies which pit Eastern Europe against the Southern Mediterranean
- the economic and financial crisis, followed by budgetary and social crises: the poor from the richer countries do not want to continue paying for the rich in the poorer countries; budget restraints in the majority of Northern Mediterranean Countries reduce the level of development aid available for Southern Mediterranean Countries
- the mandate of European multilateral institutions has not been clear in relation to the South and the founding of the Union for the Mediterranean has just added to the confusion
- competition for aid from other beneficiary nations

Few significant comments were made in the surveys regarding the general aspects of aid, but numerous comments (from both North and South) referred to the targeting of aid and the weakness of its impact. For instance, “free trade and governance are important measures with a low cost; need to be accentuated”; “EMIPF and FEMISE have a certain impact”; “A drop in an ocean of needs”. Practically no mention is made of the content or objective of aid, nor did they discuss the instruments used. While criticism may be easy, nevertheless designing the programmes will demand a greater targeting to address the key issues for the future: good governance and the creation of employment; and perhaps new financing mechanisms will have to be established.

1.8. Southern Mediterraneans Have a Dualistic and Ambiguous Vision of the Role of European Countries

The vision in the Southern Mediterranean of the role of European countries is ambiguous. This was already noticeable at the time of the Survey responses. Those from the South indicated their need and desire for receiving more aid from the North but, at the same time, they did not want to be lectured to or treated as hostages to that aid. The comments are explicit. “The majority of aid stays in Europe.” “Cooperation should take place on an objective and egalitarian basis without obscuring its cultural and sociological dimensions.”

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5. But not commensurate with aid granted in the 90s to Central European countries.
6. See the book by Serge Michailof and Alexis Bonnel Our house is burning in the South.
7. EMIPF: Euro-Mediterranean Investment and Partnership Facility, managed by the EIB.
8. FEMISE: Euro-Mediterranean Forum of Economic Institutes.
9. It should be recalled that in 2008 the question of budgetary backing for Algeria to support SMEs was posed.
II. The UFM as Envisaged and as it is Today

2.1. A Political Mandate That Does Not Address Policies And is of a Very Difficult Governance.
This new institution, launched in 2008, took the place of the Barcelona Process and is currently structured around six “technical” initiatives. The absence of any reference to democracy and human rights in the declaration represented a backward step relative to the Barcelona Process objectives. At this stage, the organisation’s chief aims are mostly of an energy-related and environmental nature, issues that are far removed from the daily concerns of the people of Southern Mediterranean Countries. More contentious subjects such as emigration, the nature of the political regimes of Member States or the Israeli-Palestinian conflict (mentioned in many Survey responses from both the South and North) have been discarded. However, it is these points which were addressed and elaborated on by the majority of respondents, showing their relative importance.

Having “too many” countries and members (44 members) with diverging interests, economies, policies and structures means that the organisation is totally incapable of coming together on common projects, thus projecting an image of weakness. These differences also serve as a brake on consensus decision-making.

2.2. Little or No Financing, But a Theoretical Role in Mobilising Finance
The majority of respondents noted an almost total absence of results from the Ufm. Rather than mobilising it, political interference has paralysed the institution; no noticeable progress has been observed in its first two years and its very existence has blocked action by other institutions wishing to launch initiatives in the (unclear) field covered by the Ufm. Its mandate seems like Mission Impossible, with generous aims but without visibility, far removed from popular concerns and lacking stable financing for its operations.

III. Southern Mediterranean Countries Have to Cover a Lot of Ground to Achieve their Transition

It is clear that, following the “revolutions” in progress, Southern Mediterranean Countries’ priority requirements are for convergence towards the European per capita GDP and controlled emigration. Their principal needs and objectives can be summarised elliptically under three broad headings:

3.1. Conceiving a Vision of Nationhood and Policies Which Generate Confidence in the Future
- creating successful economies in the Southern Mediterranean and an image of progress
- It should include a future for the youth, both male and female
- making advances on the issue of transparency and democracy
- improving the quality of education (higher and in particular professional), tailored to the country's needs; offering coaching and/or tutoring in certain activities as well as internships in Europe
- reducing income gaps for a more equitable redistribution of wealth between social classes and regions (also reviewing the tax structure and collection)

3.2. Reviewing the Economic Strategy and Mobilising the Public and Private Sectors to Set in Place Such Strategy

• creating jobs very quickly\[12\] and sustainably
• creating local added value
• improving the physical spread of investment and job creation
• mobilising and drawing on their own financial resources (over-liquid banks in the recent past) for development
• creating local markets and trade among Southern Mediterranean Countries, beyond the Agadir Agreement, thereby reducing risks arising from export oriented strategies (particularly towards Europe for many countries). The rapid spread of the “revolutions” has demonstrated that different channels of exchange are not only possible, but already exist.

3.3. Initiating Inter-Mediterranean Projects and Exchange

• mobilising certain countries on issues of common concern and needing shared management

It is evident that all these actions cannot be set in motion immediately and that a detailed strategy would allow each country to arrange its priorities. These will obviously vary from country to country as a function of the social, economic and political context as well as each one’s capacity to arrange financing.

IV. What Approach and Assistance are Possible From the Countries, Institutions and NGOs of Europe?

Many respondents clearly specify that Europe should not just be a false beacon for emigration, with fear-provoking police activities against immigrants, but should go beyond conventional aid, offering cultural exchanges, including universities and internships in businesses so as to create a stronger professional class. Aside from aid or budgetary support loans (which will be needed immediately to sustain the hard-hit economies of Tunisia and Egypt, and will be needed in other countries in due course), it will be crucial to package programmes which contribute directly or indirectly to the two prime priorities.

• governance and transparency
• job creation through various projects and financing or access to finance, projects that are practical

The aim of such a cooperation should be:

• to establish a favourable environment to build businesses, cooperatives or other social and economic bodies and to improve regional cooperation, taking into account specific local considerations. Support by Northern Mediterranean Countries could take a variety of forms, from plain organisation, to financing or technical assistance. The difference from programmes of the past should be marked by the increased and effective participation of civil society. Cooperation should not be merely a talking shop for experts and politicians.
• to improve the efficacy of those public services linked to businesses/economic activities through cooperation and twinning and lighten the regulatory burden where necessary (associated with the required reforms). These improvements might apply to taxes, duties and customs tariffs, the environment, and quality. Certain institutions, for example at the level of the environment and quality control. Certain organisations dealing with these issues could be common to two or more countries.

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to put in place coaching and tutoring for SMEs and for young professionals, and for young people in general (male or female). That would allow young people to be better integrated into the economic fabric. It requires increased attention by programme originators (both in the South and North). An opening up by the North to interns from the South would give out a strong signal.

- to mobilise local financing (as mentioned earlier). Co-financing, using local savings and emigrants' savings (or capital built up by those who have been successful) should gradually become the norm in order to even out the balance of payments and facilitate decision making. In the face of a probable decline in public financing, particularly from the Northern countries, it will be increasingly necessary to put in place financing where aid will be limited to interest subsidies or a credit risk guarantee (as already exist in certain current programmes) as well as project structuring and training where necessary. The need for greater local financing will demand the involvement of local institutions, which may need strengthening and/or restructuring. This will not only allow major projects to be financed (e.g. renewable energies, irrigation and access to water, monetisation of natural resources, infrastructure including for instance quality control labs, etc.), but also a large number of smaller projects involving young entrepreneurs and SMEs.

Finally, a communal vision arising from the current crisis could serve to launch the creation of a Southern Mediterranean market for goods, but also for services and human resources.

**V. What Role for a “New Wave” UfM?**

The UfM institution is ailing, but that does not mean that the idea of the Union for the Mediterranean should be abandoned. It is an important commitment to the longer term ambitions of the region. If the Union for the Mediterranean is synonymous with Euro-Mediterranean Partnership as stated on the European External Action Service’s website, it must take up and support “taboo” subjects such as governance and democracy, or ensure that they are integrated into the technical projects it supports. It appears to us that its role could be to project a non-technocratic, non-political message of confidence as well as to create an image, an emotion, a vision for the future with which populations can identify. The UfM should facilitate a tangible improvement in the daily lives of the inhabitants of the Southern Mediterranean.

The obstacles encountered over the course of its two first years will not be resolved by revolutions – quite the contrary – and it is certain that the countries will continue to progress at differing speeds. It must therefore set aside for the moment any universal ambition and concentrate on a progressive model, which will result in a number of rapid and discernible short term results in the context of a long term common vision. The UfM, an innovative concept, should not replace banks and existing (or prospective) development institutions, but should rather be a centre for reflection, and ideas labs for the future, which could develop new lines of thought and projects to test with specific countries and institutions. It should not try to duplicate what existing institutions could do.

The relevance of the UfM’s priorities needs to be reassessed and reviewed. These priorities are certainly important, but it is essential to find projects that are meaningful and motivational for the Southern Mediterranean. The unemployed and the politicians — who now need to be elected democratically — do not prioritise the spending of money to clean up the Mediterranean. But, if it can be explained to them that it will enhance the quality of life and the image of their country and will attract a greater number of tourists, thus creating jobs, the message may be accepted. Communication needs to take into account the desire for development and transparency to arouse popular support and not just that of the elites. What point is there in cleaning up the water if one does not have access to it?

The revolutions in progress have thrown light on the diversity of countries and their needs and even, in the interior of several countries, the pronounced differences of clans, races and religions. Women also came out onto the street, without fear. Recognition of these patterns will imply the need to be pragmatic, not to impose projects conceived “from the centre” and, even more so, in Barcelona, but rather to put in motion projects with a limited number of partners (from both Mediterranean shores) with a shared genuine interest in their outcome. It should be remembered that the European ideal started with the ECSC (European Coal and Steel Community) established in 1951, which evolved into a European Economic Community (EEC) of six notions set up by the Treaty of Rome in 1957. The community was progressively enlarged with new members emerging from autocratic regimes (Greece, Spain, Portugal) or other European countries persuaded of the benefits of such a joint effort. Simultaneously, specialist institutions were gradually created to support the aims contemplated in the treaties (Court of Justice, Parliament, European Investment Bank and so on).

As mentioned earlier, the UfM, as a generalist, should not be directly involved in setting up projects (which should be performed by existing or future specialised technical and financial institutions, be they public or private, from the North or South of the Mediterranean), nor in arranging and coordinating financing. On the other hand, working alongside project promoters and local representatives (both political and financial) it will be able to identify shortcomings in current mechanisms and institutions and propose novel approaches.

Finally, the UfM could perform the role of advisor and moderator to ensure a balance between the involved parties, always keeping in mind economic, but equally sociological and environmental context and outcome. It could accompany the execution of a project with a broad-brush monitoring of progress (whoever its initiators are) and help in re-examining strategies if necessary. In order for assessment to be possible, it will be essential to establish comparable data base and baselines, and this kind of project might involve several countries. All the foregoing could be discussed at yearly seminars/meetings putting in place measurable targets.

In conclusion, a broad panorama of innovative approaches is opening up across a range of countries and the institutions that assist and finance them. If it was hard to foresee these changes in the short term, they were predictable in the medium and long term. Following the revolutions and reforms in Southern Mediterranean countries, the ones in the North and the various institutions for cooperation will be forced to reflect self-critically in order to improve dialogues with the South and to build a balanced and solid cooperation with the active involvement of citizens at all levels.
2010 EUROMED SURVEY
ECONOMIC INTEGRATION IN THE EURO-MEDITERRANEAN: SELECTED ISSUES

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I. Regional Economic Integration EU-MED: Focus on the Free Trade Area

Euro-Mediterranean relations have since the mid-1990s been guided by a number of initiatives and programs. The Barcelona Process continued the process of creating an area of shared prosperity in the Mediterranean, started in the late 1970s with the establishment of Cooperation Agreements with many countries in the Mediterranean region, with an emphasis on creating a Free Trade Area (FTA).

BOX 1: Different levels of trade integration agreements

A. Free Trade Agreement (FTA)
Extensive reduction or elimination of tariffs on substantially all trade allowing for the free movement of goods and in more advanced agreements also reduction of restrictions on investment and establishment allowing for the free movement of capital and free movement of services.
Examples: Agadir Agreement, Greater Arab Free Trade Area (GAFTA), Pan-Arab Free Trade Area (PAFTA), Gulf Cooperation Council (GCC)

B. Customs Union (CU)
Trade agreement by which a group of countries charges a common external tariff to non-members while granting free trade among themselves. Offers an intermediate step between free trade zones and common markets (which, in addition to the common tariffs, also allow free movement of resources such as capital and labour between member countries.
Examples: Turkey-EU Customs Union, East African Community (EAC)

C. Common Market (CM)
Composed of a free trade area (for goods) with common policies on product regulation, and freedom of movement of the factors of production (capital and Labour) and of enterprise and services. A common market is a first stage towards a single market, and may be limited initially to a free trade area with relatively free movement of capital and of services, but not so advanced in reduction of the rest of the trade barriers. The European Economic Community (EEC) was the first example of a both common and single market.
Examples: European Free Trade Association (EFTA), Switzerland – European Union

D. Economic Union (EU)
Other examples: CARICOM (Single Market and Economy of the Caribbean Community Union State of Russia and Belarus.

1. This comment on the Survey draws largely on work undertaken in the context of the following EC contracts. (i) De Wulf, L., Maliszewska, M., et al., Economic Integration in the Mediterranean Region, 2009 and (ii) papers produced in the context of the MEDPRO (Mediterranean Prospects) project (www.medproforesight.eu ), a three-year project funded under the Socio-Economic Sciences and Humanities Programme of DG Research of the European Commission’s Seventh Framework Research Programme and coordinated by the Centre for European Policy Studies (CEPS).
This led to the signing of Association Agreements (AAs) with Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, and Tunisia. An interim Association Agreement guides the relations between the EU and the Occupied Palestinian territory. The timing of the signing and enactment of these AAs varied across countries. While the Tunisia AA was the first to come into force (1998), the Lebanon AA came into force only in 2006 (Table 1).

Table 1: Barcelona Process: Association and Cooperation Agreements

<table>
<thead>
<tr>
<th>Country</th>
<th>Association Agreement was signed</th>
<th>Association Agreement came into force</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>2002</td>
<td>2005</td>
</tr>
<tr>
<td>Egypt</td>
<td>2001</td>
<td>2004</td>
</tr>
<tr>
<td>Israel</td>
<td>1995</td>
<td>2000</td>
</tr>
<tr>
<td>Jordan</td>
<td>1997</td>
<td>2002</td>
</tr>
<tr>
<td>Lebanon</td>
<td>2002</td>
<td>2006</td>
</tr>
<tr>
<td>Morocco</td>
<td>1996</td>
<td>2000</td>
</tr>
<tr>
<td>Occupied Palestinian Territory</td>
<td>Interim Association Agreement 1997</td>
<td></td>
</tr>
<tr>
<td>Syria</td>
<td>Association Agreement initiated in December 2008</td>
<td></td>
</tr>
<tr>
<td>Tunisia</td>
<td>1995</td>
<td>1998</td>
</tr>
<tr>
<td>Turkey</td>
<td>EU-Turkey Customs Union 1995</td>
<td></td>
</tr>
<tr>
<td>Libya</td>
<td>Observer status since 1999</td>
<td></td>
</tr>
</tbody>
</table>


These AAs provide for the gradual establishment of a free trade area for goods originating in the EU and the signatory country over a twelve year period as of the coming into force of the AA. Different provisions are provided for industrial and agricultural commodities. Goods need to have a certificate that complies with the rules of bilateral cumulation of origin with the EU to benefit from the preferential tariff rates. Exceptions are provided for goods listed in the Annex of the AA, in the context of protection of infant industries, for goods that originate in industries that are being restructured and have serious social consequences. Goods with an agricultural component are subject to Community rules for agricultural imports.

The liberalization of agricultural and fishery products are subject to detailed rules that provide for the elimination or reduction of customs duties, and tariff quotas for goods specified in the Agreement. These negotiations are ongoing and proceed at rhythms that differ across countries. The AAs provide for suitable and effective protection of intellectual, industrial and commercial property rights, in line with the highest international standards.

Also, non-legally binding provisions of the AA include:

- right of establishment of one Party’s firms on the territory of the other,
- deepening the commitments to the stipulated adhesion to the WTO GATS obligations, particularly the obligation to grant reciprocal most-favored-nation treatment in the service sectors covered by that obligation,
- enforcement of competition rules, including state aid, with some exceptions, cooperation for standardization and conformity assessments,
- commitment to enhance intra-regional trade with the Maghreb countries,
- investment promotion and protection measures, and
- trade facilitation pertaining to the simplification of customs checks and procedures.
The dismantlement of tariffs on EU imports has largely proceeded as scheduled but, with its late, start tariffs on EU imports are still substantial and differ across MED countries (Table 2).

**Table 2: Average tariffs applied by MED countries on their imports**

(\% Unweighted Average)

<table>
<thead>
<tr>
<th>Country</th>
<th>Tariffs with all countries</th>
<th>Tariffs with EU</th>
<th>Share of duty free EU lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morocco (2009)</td>
<td>8.2</td>
<td>3.9</td>
<td>51</td>
</tr>
<tr>
<td>Tunisia (2006)</td>
<td>22.2</td>
<td>18</td>
<td>39.2</td>
</tr>
<tr>
<td>Egypt (2008)</td>
<td>9.4</td>
<td>10.1</td>
<td>6.2</td>
</tr>
<tr>
<td>Lebanon (2007)</td>
<td>5.1</td>
<td>5.4</td>
<td>n.a.</td>
</tr>
<tr>
<td>Israel (2008)</td>
<td>2.1</td>
<td>0.1</td>
<td>95</td>
</tr>
<tr>
<td>Jordan (2007)</td>
<td>10.1</td>
<td>11</td>
<td>38.3</td>
</tr>
<tr>
<td>Turkey (2009)</td>
<td>1.2</td>
<td>0.1</td>
<td>n.a.</td>
</tr>
</tbody>
</table>

Source: TRAINS; De Wulf and Maliszewska (eds.) (2009); n.a. not available.

The Survey’s respondents show a great awareness of the contribution that the Euro-Mediterranean FTA can make to the region and how the added value gained from the FTA compares with the added value obtained from globalization in general and from global trends of trade liberalization. Only 7\% of respondents indicate that they have no opinion, which is low compared with the responses to the other Survey questions. The general average of all respondents is slightly positive (6.6 out of 10), and does not differ substantially from that of the respondents from the Mediterranean Region (Graph 1).

**Graph 1: The added value of EMFTA in relation to the general process of globalization and trade liberalization**

(average on a scale of 0-10, where 0 stands for no added value, and 10 for very high added value)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey.

---

2. Moreover, negotiations regarding the further liberalization of trade in agricultural products are presently ongoing. Such negotiations have recently been concluded with Egypt (2009), Israel (2008) and Jordan (2006) and are in progress with Morocco. Negotiations on services had been initiated with Morocco, Algeria, Egypt and Israel while negotiations on standards for industrial products (ACAAAs) were under preparation (and were launched with Israel for the pharmaceutical sector).

3. Data for “all countries” and “with EU” are not strictly comparable due to the method of calculating these tariffs. The TRAINS (UNCTAD Trade Analysis and Information System) database reports a zero applied tariff if there is no trade between Mediterranean countries and the EU for a given product, which introduces a bias since, for this product, tariffs are not necessarily equal to zero.
1.1. Euro-Mediterranean FTA Performance on Trade

A recent study that analyzed the trade between the EU and eight Mediterranean countries between 1996 and 2006 suggest that exports from these MPCs to the EU rose by an annual rate of 6.4% versus a rate of 15.6% to the rest of the world (hereafter, ROW) (see Table 6). Moreover, exports to NAFTA countries rose by an annual rate of 14%, while those to the Gulf Cooperation Council (hereafter, CCG) rose by an annual rate of 18%. Notwithstanding, nearly half of all exports of MPCs are directed towards the EU, confirming the dominant position of the EU in Mediterranean trade relations (Table 3) despite some exceptions (Table 4). In contrast, it must be stressed that, in terms of trade, MPCs are secondary partners for the EU (Table 5).

Table 3: Mediterranean Partner Countries’ (excluding Turkey) trade with the EU (2004-2010)

<table>
<thead>
<tr>
<th>Year</th>
<th>Imports (M)</th>
<th>Annual Variation (%)</th>
<th>EU Share of M (%)</th>
<th>Exports (X)</th>
<th>Annual Variation (%)</th>
<th>EU Share of X (%)</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>57,662</td>
<td>12.4</td>
<td>43.9</td>
<td>49,281</td>
<td>25.1</td>
<td>46.8</td>
<td>-8,391</td>
</tr>
<tr>
<td>2005</td>
<td>60,275</td>
<td>4.5</td>
<td>43.9</td>
<td>50,202</td>
<td>1.9</td>
<td>44.7</td>
<td>-10,072</td>
</tr>
<tr>
<td>2006</td>
<td>63,612</td>
<td>5.5</td>
<td>41.5</td>
<td>56,744</td>
<td>13</td>
<td>43.2</td>
<td>-6,868</td>
</tr>
<tr>
<td>2007</td>
<td>72,596</td>
<td>14.1</td>
<td>41.3</td>
<td>55,997</td>
<td>-1.3</td>
<td>41.0</td>
<td>-16,599</td>
</tr>
<tr>
<td>2008</td>
<td>80,875</td>
<td>11.4</td>
<td>40.3</td>
<td>67,580</td>
<td>16.6</td>
<td>42.0</td>
<td>-13,295</td>
</tr>
<tr>
<td>2009</td>
<td>69,460</td>
<td>-14.1</td>
<td>41.1</td>
<td>46,516</td>
<td>-31.2</td>
<td>40.0</td>
<td>-22,944</td>
</tr>
<tr>
<td>2010</td>
<td>84,527</td>
<td>21.7</td>
<td>40.5</td>
<td>55,585</td>
<td>19.5</td>
<td>38.5</td>
<td>-28,942</td>
</tr>
</tbody>
</table>

### Table 4: MPC's trade relations by origin and destination

<table>
<thead>
<tr>
<th>Partner</th>
<th>Imports % share</th>
<th>Partner</th>
<th>Exports % share</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Algeria</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>EU-27</td>
<td>53.4%</td>
</tr>
<tr>
<td>2</td>
<td>China</td>
<td>United States</td>
<td>10.8%</td>
</tr>
<tr>
<td>3</td>
<td>Tajikistan</td>
<td>Canada</td>
<td>4.5%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>4.1%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9 Region</td>
<td>3.3%</td>
</tr>
<tr>
<td><strong>Israel</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>United States</td>
<td>34.8%</td>
</tr>
<tr>
<td>2</td>
<td>United States</td>
<td>EU-27</td>
<td>13.0%</td>
</tr>
<tr>
<td>3</td>
<td>China</td>
<td>Hong Kong</td>
<td>8.3%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>3.2%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9</td>
<td>0.7%</td>
</tr>
<tr>
<td><strong>Lebanon</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>Syria</td>
<td>35.0%</td>
</tr>
<tr>
<td>2</td>
<td>United States</td>
<td>United Arab Emirates</td>
<td>11.0%</td>
</tr>
<tr>
<td>3</td>
<td>Syria</td>
<td>EU-27</td>
<td>8.8%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>3.7%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9 Region</td>
<td>13.0%</td>
</tr>
<tr>
<td><strong>Syria</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>Iraq</td>
<td>18.7%</td>
</tr>
<tr>
<td>2</td>
<td>Saudi Arabia</td>
<td>EU-27</td>
<td>11.3%</td>
</tr>
<tr>
<td>3</td>
<td>China</td>
<td>Lebanon</td>
<td>10.7%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>8.1%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9 Region</td>
<td>8.9%</td>
</tr>
<tr>
<td><strong>Egypt</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>EU-27</td>
<td>33.5%</td>
</tr>
<tr>
<td>2</td>
<td>United States</td>
<td>United States</td>
<td>12.3%</td>
</tr>
<tr>
<td>3</td>
<td>China</td>
<td>India</td>
<td>10.9%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>4.1%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9</td>
<td>2.1%</td>
</tr>
<tr>
<td><strong>Jordan</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>United States</td>
<td>20.7%</td>
</tr>
<tr>
<td>2</td>
<td>Saudi Arabia</td>
<td>Iraq</td>
<td>18.9%</td>
</tr>
<tr>
<td>3</td>
<td>China</td>
<td>India</td>
<td>11.1%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>3.8%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9</td>
<td>9.0%</td>
</tr>
<tr>
<td><strong>Morroco</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>EU-27</td>
<td>57.2%</td>
</tr>
<tr>
<td>2</td>
<td>China</td>
<td>India</td>
<td>8.2%</td>
</tr>
<tr>
<td>3</td>
<td>United States</td>
<td>United States</td>
<td>8.3%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>2.0%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9</td>
<td>3.7%</td>
</tr>
<tr>
<td><strong>Tunisia</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>EU-27</td>
<td>EU-27</td>
<td>67.2%</td>
</tr>
<tr>
<td>2</td>
<td>China</td>
<td>Libya</td>
<td>4.7%</td>
</tr>
<tr>
<td>3</td>
<td>Turkey</td>
<td>Algeria</td>
<td>3.4%</td>
</tr>
<tr>
<td></td>
<td>Turkey</td>
<td>Turkey</td>
<td>3.4%</td>
</tr>
<tr>
<td></td>
<td>MEDA-9</td>
<td>MEDA-9</td>
<td>3.8%</td>
</tr>
</tbody>
</table>

Source: DG Trade 2010 “Bilateral relations”. No data available for the Occupied Palestinian Territory
The slower growth rate of exports to the EU (Table 6) is explained by the fact that
- MPCs already enjoyed basically duty-free access to the EU before the coming into force of AAs,
- that during this period the EU grew at a slower pace than the rest of the world and
- international trade negotiations led to substantial worldwide reduction in Most Favored Nation (hereafter, MFN) tariffs, thereby reducing the tariff preference enjoyed by the MPCs in trade with the EU. Also, exports from these MPCs to the EU are slowed by a considerable array of Non-Tariff Measures, which on balance are more stringent trade restrictions than the tariff measures themselves. However, it is paramount to note that differences across countries are very significant.5

During this same period imports from the EU into MPCs rose by an annual rate of 4.7% as compared with a rate of 11.6% for imports from the ROW. In 2004, imports to MPCs from the EU stood at 45%, again confirming the dominant position of the EU-MEDs trade relations. The slow growth of EU imports is also in part explained by the gradual nature of the tariff dismantlement as discussed above and by the late coming into force of some AAs. Again, in regard to MPCs, differences across countries are very significant (Table 6).

4. This issue will be discussed in greater detail later in this document when addressing “Deep versus Shallow Trade Integration”. Suffice to note here that these tariff and non-tariff measures convey an anti-export bias to the economies of the MPCs, containing exports below their potential
5. Jordan’s exports to the EU, for instance, rose by a much lower rate than most of the other countries, while its exports to the ROW was much higher than the regional average. Exports of non-oil commodities to the EU actually fell in Algeria but rose to the ROW.

---

Table 5: EU trade relations by destination, 2010

<table>
<thead>
<tr>
<th>Regional Partner*</th>
<th>EU Imports by destination</th>
<th>EU Exports by destination</th>
<th>Imports + Exports by destination</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>€Million</td>
<td>% over the total</td>
<td>€Million</td>
</tr>
<tr>
<td>ACP</td>
<td>64783.1</td>
<td>4.3%</td>
<td>68722.2</td>
</tr>
<tr>
<td>Andean Community</td>
<td>12198.6</td>
<td>0.8%</td>
<td>7905.9</td>
</tr>
<tr>
<td>ASEAN</td>
<td>86373.8</td>
<td>5.8%</td>
<td>60635.1</td>
</tr>
<tr>
<td>BRIC</td>
<td>505863.7</td>
<td>33.7%</td>
<td>265708.2</td>
</tr>
<tr>
<td>ACP</td>
<td>7576.1</td>
<td>0.5%</td>
<td>4504.6</td>
</tr>
<tr>
<td>Candidate Countries</td>
<td>48616.5</td>
<td>3.2%</td>
<td>73897.7</td>
</tr>
<tr>
<td>CIS</td>
<td>200474.7</td>
<td>13.3%</td>
<td>123694.2</td>
</tr>
<tr>
<td>EFTA</td>
<td>167022.8</td>
<td>11.1%</td>
<td>150030.1</td>
</tr>
<tr>
<td>Latin American Countries</td>
<td>90034.3</td>
<td>6.0%</td>
<td>84013.5</td>
</tr>
<tr>
<td>MEDA (excl. EU and Turkey)</td>
<td>60624.3</td>
<td>4.0%</td>
<td>80733.3</td>
</tr>
<tr>
<td>Mercosur</td>
<td>43955.3</td>
<td>2.9%</td>
<td>40104.0</td>
</tr>
<tr>
<td>NAFTA</td>
<td>202632.3</td>
<td>13.5%</td>
<td>290074.1</td>
</tr>
</tbody>
</table>

Note:* EFTA: Iceland, Liechtenstein, Norway, Switzerland; Candidates: Croatia, FYR of Macedonia, Turkey; Andean Community: Bolivia, Colombia, Ecuador, Peru; CIS: Armenia, Azerbaijan, Belarus, Georgia, Kyrgyzstan, Kazakhstan, Republic of Moldova, Russian Federation, Tajikistan, Turkmenistan, Ukraine, Uzbekistan; CACM: Honduras, El Salvador, Nicaragua, Costa Rica, Guatemala, Panama; Mercosur: Argentina, Brazil, Paraguay, Uruguay; NAFTA: Canada, Mexico, United States; Latin America Countries: CACM, Mercosur, ANCOM, Chile, Cuba, Dominican Republic, Haiti, Mexico, Panama, Venezuela; BRIC: Brazil, Russia, India, China; ASEAN: Brunei Darussalam, Indonesia, Cambodia, Lao People’s Democratic Republic, Myanmar, Malaysia, Philippines, Singapore, Thailand, Vietnam; ACP: 79 countries; MEDA (excl. EU and Turkey): Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syrian Arab Republic, Tunisia.
Accordingly, the responses in relation to the progress of the implementation of the Euro-Mediterranean Free Trade Area differ greatly according to the nationality of the respondents (Graph 2). For instance, Algerian respondents rank the added value of the EU-MED FTA at 2.5, the lowest of all responses to this question. This should not come as a surprise when considering that exports from Algeria to the EU fell by an annual 10% between 1996 and 2006, while exports to the ROW rose by an annual rate of 18%.

Graph 2: Assessing the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries. Nationals respondents assessing their own country (average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

In regard to trade dynamics in FTAs, the analysis of the use of the rules of origin by traders is of the utmost importance. The Pan-Euro-Med system used to determine the origin of a product system, and, thus, its access to preferential tariff treatment permits diagonal cumulation – which means that products which have obtained originating status in one of the 43 countries may be added to products originating in any other of the 43 without losing their originating status within the Pan-Euro-Med zone. In practice, countries of the Pan-Euro-Med zone can only cumulate originating status of the goods if the free trade agreements including a Pan-Euro-Med origin protocol are applicable between them. This is the case for the countries that have an AA or cooperation agreement with the EU.

### Table 6: Annual growth rate of non-oil trade (1996-2006)

<table>
<thead>
<tr>
<th></th>
<th>X-EU</th>
<th>X-ROW</th>
<th>M-EU</th>
<th>M-ROW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>-10.2</td>
<td>18.3</td>
<td>10.7</td>
<td>17.5</td>
</tr>
<tr>
<td>Morocco</td>
<td>6</td>
<td>9.9</td>
<td>6.7</td>
<td>15.7</td>
</tr>
<tr>
<td>Egypt</td>
<td>11.7</td>
<td>23.7</td>
<td>2.7</td>
<td>7.9</td>
</tr>
<tr>
<td>Israel</td>
<td>4.9</td>
<td>10.7</td>
<td>2.6</td>
<td>8.0</td>
</tr>
<tr>
<td>Jordan</td>
<td>3.6</td>
<td>25.8</td>
<td>9.5</td>
<td>17.6</td>
</tr>
<tr>
<td>Libya</td>
<td>12.1</td>
<td>21.7</td>
<td>3.4</td>
<td>15.9</td>
</tr>
<tr>
<td>Syria</td>
<td>5.6</td>
<td>20</td>
<td>6.9</td>
<td>16.4</td>
</tr>
<tr>
<td>Tunisia</td>
<td>7.6</td>
<td>12.7</td>
<td>5.9</td>
<td>10.9</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>6.4</strong></td>
<td><strong>15.6</strong></td>
<td><strong>4.7</strong></td>
<td><strong>11.6</strong></td>
</tr>
</tbody>
</table>

Source: De Wulf and Maliszewska (eds.) (2009), p. 51
A smooth functioning of the AAs requires that partners can actually take advantage of the preferences available, which implies that they can produce certificates of origin without incurring excessive costs. Various Business Surveys have illustrated that traders complain about a complex system and that the hassle and cost of obtaining these certificates of origin at times exceed the tariff preferences granted upon import into the EU. A recent study of imports into the EU for five MPCs suggested that in excess of 80% or more of exports came in duty-free, leaving up to 10% of exports (18% for Jordan) in categories where there should have been a zero tariff but where a non-zero MFN rate was actually paid. Some products are more likely than others to enter the EU without the certificate of origin; these include articles of apparel, mineral fuels and edible vegetables. This is thought to be a common issue where tariff preferences are very low and the cost of obtaining certificates of origin is high. Misclassification and high cost of obtaining the certificates of origin are also thought to be responsible for this non-use of certificates of origin. Another reason for the low utilization of the Pan-Euro-Med Rules of Origin is that inputs from the EU zone are expensive compared with inputs from other countries.

The Survey results in part agree with the findings of the above analysis in that they report the system to be complex (28% of responses), not well adapted to their needs (12%) and costly to operate (8%). Importantly, however, the majority of respondents (41%) note that trade operators are not well informed about the system, which suggests that a greater effort should be made to better disseminate the cumulative system and assist traders to implement the system.

II. FTA and Liberalization of Services

As far as liberalization of services is concerned, negotiations were opened in 2005 – in the framework of the ENP – for a restricted number of countries: Morocco, Egypt, Israel and Tunisia. As for the FTA negotiations, services are classified in four different ways depending on how they can be supplied. These are known as “modes” in GATS terminology: cross-border supply, consumption abroad, commercial presence, and presence of natural persons. In the negotiations on the FTA in services that the EU has concluded so far (Mexico, Chile, and Caribbean countries), modes 1 (cross-border supply) and 3 (commercial presence) were the primary objectives of services liberalization negotiations.6

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6. Tovias, A., A Deeper Free Trade Area and Its Potential Economic Impact. 10 Papers for Barcelona 2010, IEMed, EUISS.
Box 1: Trade in services between the EU and the MPCs

“(…) As a matter of fact, the current extent of trade in services between the EU and the MPCs is not that significant. Taking all countries together, EU service exports to MPCs accounted for less than 2% of the overall EU service export volume as of 2007. The EU exports a larger share to ACP countries, Latin America, and even to Gulf States than to the MED region. The share of EU imports from MPCs is not much higher either – less then 3% of the overall EU imports in 2007. The US represents the most important partner for the EU in trade in services – accounting for more than 10% of overall trade flows.”

“(…) Most of the MPCs are members of the WTO; however, as many authors stress, they are lagging behind the commitments made within the GATS. Not only are a number of sectors subjected to GATS disciplines limited, but also the commitments made are very shallow – Tunisia has bound only 3 out of 11 possible sectors, Egypt 4, Morocco 7, and Jordan 11. Among the most frequently bound sectors are: tourism and financial services, (by four of the eight Arab MPCs), followed by communications, construction, and transport services (bound by three countries each).

Sectors Bound under GATS (2002)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Egypt</th>
<th>Jordan</th>
<th>Morocco</th>
<th>Tunisia</th>
<th>Total</th>
<th>Israel</th>
<th>Turkey</th>
<th>WTO*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td>2</td>
<td>x</td>
<td>x</td>
<td>71%</td>
</tr>
<tr>
<td>Communications</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td>3</td>
<td>x</td>
<td>x</td>
<td>68%</td>
</tr>
<tr>
<td>Construction</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td>3</td>
<td>x</td>
<td></td>
<td>51%</td>
</tr>
<tr>
<td>Distribution</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>1</td>
<td>x</td>
<td></td>
<td>36%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
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<tr>
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</tr>
<tr>
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<td>x</td>
<td>x</td>
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<td></td>
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<tr>
<td>Transport</td>
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<td></td>
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<td>3</td>
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“With respect to services, the EU would like to start with financial services, IT, transport and energy. Some of the services, after having the multilateral basis, could be further deepened on a regional or bilateral basis. Generally, binding a greater number of sectors and deeper commitments on the side of MPCs could be treated as ‘an important signal to investors, it can externally anchor domestic reforms, and it discourages vested interests to lobby for trade protection.’ An ambitious deal on services is a goal of the EU, but significant progress would be made only when there is a movement in agricultural and industrial market access although some reports show that more could be gained, by both developing and developed countries, from a 25% cut of the barriers in services than from a 70% tariff cut in agriculture in the North and a 50% cut in the South.”


The Survey shows that one third of respondents are not aware of the progress regarding these negotiations. Box 4 shows the complexity of being updated on these negotiations. Among those who responded, there was a moderate to positive opinion and a slightly more positive assessment was seen among EU countries (Graph 3). This could be explained because while the EU has a comparative advantage in modes 1 (cross-border supply) and 3 (commerce presence) the MPCs have interests in liberalization of modes 2 (consumption abroad) and 4 (presence of natural persons). The European member states are reticent to make concessions on mode 4, which discourages the MPCs from granting right of establishment for service providers to European companies.7

Graph 3: Assessment on the progress of on-going negotiations for services liberalization by origin of the respondents

(average on a scale of 0-10, where 0 stands for very negative, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

1.3. Euro-Mediterranean FTA’s Performance on Foreign Direct Investment Promotion8

AAs identified the objective of improving the investment climate and of promoting foreign direct investment (FDI). The anticipated positive effects of FDI on the host economy have widely served as a basis for policies recommending the opening up of the economy to foreign investors. Attracting FDI also provides an impulse to improve the investment climate in general and create much needed employment growth. Policymakers in developing countries have increasingly viewed FDI as the best and fastest way to get access to foreign technologies, markets, and increase foreign currency earnings as well as building domestic production capabilities and exports. But policies that aimed at greater reliance on FDI in several countries needed to overcome fears about their possible negative effects in terms of increased competition with established national firms and had to counter political criticism, seen among developing coun-

8. Based largely on Sekkat, K, The Determinants of Foreign Direct Investment in MED-11 Countries: Summary of the Literature, prepared in the context of the MEDPRO project.
tries as a colonial relic aimed at taking control of national resources.9 Based on this suspicion of the impact of FDI, many developing countries passed legislation restricting foreign ownership, repatriation of capital, conditioning FDI on performance requirements and technology transfer, among others. The official aim was to maximize the benefits of foreign participation in national economies using public policy as a tool to channel investments to critical sectors, gather knowledge and protect the economy from international competition. Arab and Southern Mediterranean countries were not exceptions to this trend and imposed for some time strict limits on FDI. However, these attitudes have gradually changed and restrictions on FDI have slowly been eased. As a result, inflows have slowly increased partly as a result of a less restrictive framework. Yet they remain still highly disappointing and most probably below their potential. Data on FDI in the Mediterranean region are very weak and are available with great delay, also because such data often refer to FDI-financed projects rather than to FDI actual transfers.

Graph 4 presents the figures of FDI in the region compared to developing economies (except China) and African economies (except South Africa). Overall, the region receives a small share (1.2%) of the world’s total flow of FDI. Between 1995 and 2004, the MED-11 received on average little more than $8 billion against $17 billion received by the new EU Member countries. But the MED11FDI/GDP ratio rose from 1.1 in 1998 – amongst the lowest globally – to 5.6% in 2006, when it was the highest followed by Europe and Central Asia where the ratio stood at 5.1%.

Graph 4: FDI inflows in the MED-11 area in relation to developing economies* and africa**, 1985-2008

![Graph 4](chart.png)

Note: *China excluded **South Africa excluded.
Source: UNCTAD World Investment Report 2009, online database

There are, however, notable differences across countries. Abstracting from Israel and Turkey, which accounted for about half of the inflows to the Region in 1985-2008, FDI went predominantly to a few countries such as Tunisia, Egypt and Morocco, while the others and particularly Libya were the lowest recipients (Graph 5). Inflows were particularly directed to tourism, banking, telecommunications, manufacturing and construction activities, probably reflecting market and efficiency-seeking investments.

9. Without digressing too much it might be useful to keep in mind that the impact of FDI on GDP growth and employment is an issue that is still widely debated by professional economists. To quote Dani Rodrik: “Today’s policy literature is filled with extravagant claims about positive spillovers from FDI but the evidence is sobering.” The prior 10 years of research have confirmed that the (aggregate) evidence is still sobering. Yet evidence based on micro-data shows that firms investing and producing in foreign countries have superior productivity at home, so that it is reasonable to assume that foreign affiliates should also enjoy a productivity advantage compared with local firms in the host economy.
Graph 5: MED-11 country share of FDI inflows (1985-2005) and stocks (1985-2008)

The origin of FDI differs greatly from country to country and reflects cultural and other ties between the recipient country and the country where FDI originates (Graph 6). Based on the analysis for a subset of the countries with which the EU signed an AA, EU investment represents 65% of the total FDI in Morocco, as compared to only 5% in Jordan. Investments originating in the Gulf countries and MENA dominate FDI in both Tunisia and Jordan. FDI from the US-Canada dominate in Israel with a share of 87%.

Graph 6: FDI inflows into MED5 by origin 2003-2007

Available data also suggest that overall FDI inflows into the MED region remain very low and stagnate over time while FDI stocks grow faster than inflows, suggesting that established companies become either more profitable (which may increase their share value), reinvest a part of their profit or become more indebted to their parent companies (Graph 7). FDI flows are greatly affected by the business climate. Data provided by the Doing Business Survey, an-
nually produced by the World Bank, suggest that – aside from Israel, Tunisia and Turkey – the other Mediterranean countries score rather low. To the extent that the EU-Mediterranean FTA improved this climate it will benefit these flows.

**Graph 7: FDI flows and stocks in the MED-11 area (in millions of current USD), 1985-2008**

Respondents to the Survey indicate, in general, their positive view of FDI with about three out of four respondents indicating a positive or very positive view (given a 5 or more as response). Respondents from Turkey and Syria followed by Egypt give the most positive view of FDI while respondents from Algeria and Palestine give a rather disappointing view (Graph 8).

**Graph 8: Assessment on the impact of the EMFTA on economies of MPCs in terms of impact on growth, competitiveness and FDI**

(average on a scale of 0-10, where 0 stands for very negative impact, and 10 for very positive impact)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey.
Graph 9: Assessing the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: impact on growth, competitiveness and Foreign Direct Investment. Nationals respondents assessing their own country
(average on a scale of 0–10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

1.4. Euro-Mediterranean FTA Impacts on Domestic Economies of MPCs

1.4.1. FTA and State Revenue
As import tariffs deriving from the trade activities of MPCs with the EU were a major source of MPCs’ revenues, trade liberalization trends, in general, and the Euro-Mediterranean FTA, in particular, are bound to have detrimental effects on state revenue in light of the implied reduction and eventual elimination of tariffs. With customs revenue still an important source of fiscal revenue in many Mediterranean countries, these trends need to be compensated with greater emphasis on the non-distortional revenue sources, such as value added taxes. A number of countries have efficiently replaced the customs duties with value added taxes. Others have been less successful at this switch in revenue sources.

Respondents appear evenly distributed amongst those that hold a positive, very positive and negative view on the impact of the FTA on state revenue (Graph 9). This is likely to reflect the success with which countries have been able to undertake this shift in state revenue sourcing.

Graph 10: Assessment on the impact of the EMFTA on economies of MPCs in terms of fiscal impact
(average on a scale of 0–10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
1.4.2. FTA and Employment

As is generally agreed, FTA impacts on employment are narrowly related to the comparative advantages of products being traded. As international trade models show, countries will export products that use their abundant and cheap factor(s) of production and import products that use the countries’ limited factor(s). This trade dynamic has its specific outcomes, among others entailing social impacts. For the Euro-Mediterranean Free Trade Area, as the Sustainability Impact Assessment (SIA) study identifies, some social impacts in MPCs are beneficial in the short term as well as the long term, and others may be significantly adverse unless effective mitigating action is taken (Box 2).

In addition, the SIA identifies the potential impacts of greater concern that should be object of appropriate preventive and mitigating measures, including a significant short-term rise of unemployment due to industrial and agriculture trade liberalization between the European Union and the MPCs. Increased unemployment will bring a fall in wage rates. There are other impacts not strictly related to unemployment but, added to a rising unemployment scenario, alerts on the need for effective mitigating measures for the trade liberalization process to success. Namely, we can mention:

- a significant loss in government revenues in some countries, with potential for consequent social impacts through reduced expenditure on health, education and social support programs;
- greater vulnerability of poor households to fluctuations in world market prices for basic foods;
- adverse effects on the status, living standards and health of rural women, associated with accelerated conversion from traditional to commercial agriculture.

Notwithstanding, the EMFTA impact on employment as well as its social impact has an intermediate evaluation. This could be based on the expectations so far (Box 3) even if the assessment by countries shows a heterogeneity from positive to negative impact on employment (Graph 9).

**BOX 2: FTA and impact on employment in different economic sectors**

For industrial products, employment in MPCs will decline initially in those sectors where domestic production is replaced by imports, and rise in those where an increase in production is stimulated. The net short-term impact in the absence of effective mitigation is assessed to be significantly negative. Overall long-term effects will depend on policies affecting wage rates, re-training, and the extent to which the exposure to competition generates consistent long-run economic growth. Unemployment is likely to remain high in MPCs throughout the period of adjustment, as starting levels of unemployment are high, and additional pressures will arise as employment shifts from uncompetitive sectors to competitive ones.

For agriculture, the overall employment effects are expected to be small, but with significant positive and negative short-term local effects in MPCs and southern EU countries. New jobs will be created in MPCs in the production of fruit, vegetables, olive oil, fish and some other products, but partly countered by loss of jobs in products such as cereals, livestock and dairy produce, and incentives to increase productivity. Following consultation on the findings of the Phase 2 study, priority was given in Phase 3 to small-scale agriculture and the non-farm rural sector. Agricultural liberalization as a whole is not expected to have a significant short-term impact on overall levels of unemployment. Unless accompanied by successful domestic policies for integrated rural-urban development, the longer-term impact on employment of agricultural liberalization may be significantly adverse in both rural and urban areas.

For services, no significant adverse impacts on employment are expected in the EU. In MPCs there will be negative adjustment effects in the short run as sectors become more efficient and productive. Impacts are expected to be small overall, and restricted to service sub-sectors in which productivity increases rapidly. In comparison with similar changes associated with privatization and other domestic reforms, impacts from services liberalization in the EMFTA are not likely to be more than minor in significance.

For liberalization of South-South trade, the employment impacts are expected to be smaller than those for liberalizing trade with the EU. There may however be significant short-term adverse impacts in Mashreq countries for agricultural and other products for which comparative advantages are similar.


**BOX 3: FTA and unemployment**

“During the last decade, the eight Arab Southern Mediterranean Partners that have Association Agreements with the EU, among other Arab countries, have witnessed a structural disconnect between their economic growth policies, including trade policies, and the development challenges they face. Despite achieving high economic growth rates and higher liberalization of markets and trade, most of them witnessed increasing poverty and some of the highest unemployment rates.” Evidence from a 2009 research by FEMISE,** focusing on Egypt and Morocco, shows that the trade liberalization they have undertaken has clearly contributed to restructuring of the labor markets and to sectoral change in employment. The international crisis, with its economic and developmental dimensions, aggravated these existing developmental challenges. However, the fora and mechanisms for addressing such a structural policy problematic is still lacking among Arab countries.*

*Arab Monetary Fund (2009); Joint Arab Economic Report, p. 3.

**FEMISE (2007-2008); “Unemployment, Job Quality and Labour Market Stratification in the MED Region: The cases of Egypt and Morocco”.

Graph 12: Assessment on the impact of the EMFTA on economies of MPCs in terms of impact on employment and social impact. Nationals of each country assessing their own country (average on a scale of 0-10, where 0 stands for very negative, and 10 for very positive)

II. Implementation of South-South FTA: PAFTA, General Arab Free Trade Agreement, Arab Maghreb Union

All AAs stressed the importance of enhancing South-South trade integration. In this respect, two main agreements are currently operating. Firstly, the Pan Arab Free Trade Area (PAFTA), which came into force in 1998 and liberalized nearly all tariff lines amongst its signatories. Secondly, the Agadir Agreement (Egypt, Jordan, Morocco and Tunisia), which came into force in 2007, created an FTA amongst its signatories. Where lowering tariff rates stimulate trade and cause the familiar trade creation and trade diversion forces, the Agadir Agreement did not see any major changes in 2007, given that all its signatories were already party to the PAFTA agreement. Hence the shallow integration effects of this agreement are hard to capture and to disentangle from the shallow integration effects of the PAFTA agreement (Graph 11).
Despite the existence of the aforementioned South-South Free Trade Areas, intra-regional trade is rather small (Table 7) mainly due to factors related to MPCS’ production structures. Namely, the potential benefit from integration between MPCS can be analyzed by comparing a country’s exporting structure with the importing structures of the partners of the regional integration initiative. The more similar these structures are the more scope there is for trade creation – such as contracting with trade diversion – as regional supply can potentially respond to regional demand. An analysis of data for 2006 suggests little evidence that MPCS’ supply structures are well suited to other demand structures of MPCS. Moreover, a comparison of export structures (such as proxy for production structure) of a select group of Mediterranean countries in order to find the potential for intra-industry trade – which has proven to be a very potent source of bilateral trade – also suggest that the scope for intra-industry based trade creation is at present rather low. Both facts suggest that the potential for strong trade effects from S-S integration is likely to be modest. In addition to structural constraints, the low level of intra-regional trade is also related to the high level of non-tariff measures (barriers) in trade between MPCS. Indeed, after the elimination of tariffs under PAFTA, new non-tariff measures (barriers) have been used excessively by MPCS in order to protect domestic industry and agriculture.

Table 7: Trade flows between MED countries in 2007

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<thead>
<tr>
<th>Country</th>
<th>Algeria Imports</th>
<th>Algeria Exports</th>
<th>Egypt Imports</th>
<th>Egypt Exports</th>
<th>Israel Imports</th>
<th>Israel Exports</th>
<th>Jordan Imports</th>
<th>Jordan Exports</th>
<th>Lebanon Imports</th>
<th>Lebanon Exports</th>
<th>Mauritania Imports</th>
<th>Mauritania Exports</th>
<th>Morocco Imports</th>
<th>Morocco Exports</th>
<th>Palestinian T. Imports</th>
<th>Palestinian T. Exports</th>
<th>Syria Imports</th>
<th>Syria Exports</th>
<th>Tunisia Imports</th>
<th>Tunisia Exports</th>
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</table>

Source: CASE Network Report and COMTRADE

13. Except for the Palestinian Territory where intraregional trade is very high given its landlocked and particular geopolitical circumstances – intraregional trade at 10% for exports and 8% for imports.
Consistently, respondents had a very negative view of the South-South trade initiatives whether it refers to the Agadir Agreement, the Pan Arab Free Trade Agreement or the Arab Maghreb Union (their implementation is respectively ranked at 4.72, 4.22 and 3.58 out of 10). This is likely to reflect the low level of intra-regional trade and the remaining barriers to such trade.

III. A Step Forward Towards Economic Integration: EU-Turkey Customs Union

Turkey applied for associate membership of the EU – then the European Economic Community (EEC) – as early as 1959. The application ultimately resulted in the signing of the Association (Ankara) Agreement in 1963. The Additional Protocol to the Ankara Agreement was signed in 1970, and became effective in 1973. More than 20 years later, in 1995 a Customs Union (hereafter, CU) between Turkey and the EU was agreed upon to start on 1st January 1996 (BOX 4)

**BOX 4: Turkey’s commitment under 1996 Customs Union**

- eliminates all customs duties, quantitative restrictions, all charges having equivalent effect to customs duties and all measures having equivalent effect to quantitative restrictions in trade of industrial goods with the EU as of 1st January 1996.
- adopts the Common Customs Tariff (CCT) against third country imports by 1st January 1996 and adopts all of the preferential agreements the EU has concluded with third countries by the year 2001.
- approximates and implements the EU’s commercial policy regulations, including procedures for anti-dumping rules, administering quantitative quotas and procedures for officially supported export credits.
- incorporates within five years into its internal legal order the Community instruments relating to the removal of technical barriers to trade (TBTs). The list of these instruments is to be laid down within a period of one year. Effective cooperation is to be achieved in the fields of standardization, metrology and calibration, quality, accreditation, testing and certification.
- adopts the EU’s customs provisions in the fields of (i) origin of goods, (ii) customs value of goods, (iii) introduction of goods into the territory of the CU, (iv) customs declarations, (v) release for free circulation, (vi) suspensive arrangements and customs procedures with economic impact, (vii) movement of goods, (viii) customs debt and (ix) right of appeal.
- adopts the EU competition rules, including measures regarding public aid within two years. Turkey shall ensure that its legislation in the field of competition rules is made comparable with that of the Community, and is applied effectively.
- ensures adequate and effective protection and enforcement of intellectual, industrial and commercial property rights. Turkey will implement the Trade Related Aspects of Intellectual Property Rights (TRIPS) Agreement by 1999.

A recent evaluation of this CU concluded that the EU-Turkey CU of 1995 has been a major instrument of integration into the EU and global markets, offering powerful tools to reform the Turkish economy. By opening its market to EU competition and streamlining its customs procedure, the CU has credibly locked Turkey into a liberal foreign trade regime for industrial goods and holds a promise of Turkey’s participation in the EU internal market for industrial products. As a result, Turkish producers of industrial goods have become exposed to competition from imports and they operate in one of the largest, if not the largest, free trade areas for industrial products in the world. They are now protected by tariffs from external competition to exactly the same extent as EU producers are and as such face competition from duty-free imports of industrial goods from world-class pan-European firms. In return, Turkish industrial

14. Subidey, T., *Turkey-EU Customs Union*. This paper was produced in the context of the MEDPRO (Mediterranean Prospects) project (www.medproforsight.eu), a three-year project funded under the Socio-Economic Sciences and Humanities Programme of DG Research of the European Commission’s Seventh Framework Research Programme and coordinated by the Centre for European Policy Studies (CEPS).
producers have duty-free market access to the European Economic Area (EU-27 and EFTA).\textsuperscript{15} Fulfilling the requirements of the CU has been challenging for Turkey, particularly with respect to the elimination of Technical Barriers to Trade (hereafter, TBTs), adoption and implementation of the EU’s competition policy provisions on state aid, and ensuring adequate and effective protection of intellectual property rights.

69\% of respondents from Turkey noted that they have a good knowledge of the impact of the EMFTA and the EU-Turkey CU which reflects both the recent discussion between Turkey and the EU regarding EU membership and the visibility of these discussions in the Turkish political arena as well as the impact that the establishment of the CU had on producers and consumers alike.

Graph 13: Awareness Rate on the Impacts of EMFTA and EU-Turkey Customs Unions. Knowledge or a clear perception of the impact of the Euro-Mediterranean Free Trade Area and the EU-Turkey Customs Union: MPC respondents by country (\%)

In contrast, 70\% of all respondents to the Survey appear to be unaware of the Turkey-EU CU and the EMFTA suggesting that this aspect of economic integration has received little visibility in the Mediterranean region and that the lessons learned from this initiative could still be more broadly disseminated.

\textsuperscript{15} EFTA’s current members are: Liechtenstein, Iceland, Norway and Switzerland.
IV. Final Considerations: Deep versus Shallow Integration

Free Trade Agreements that focus solely on the reduction of tariffs foster trade integration, but by leaving outside of the negotiation many factors that inhibit trade. Such negotiations have been termed “shallow” integration compared with “deep” integration, which refers to trade agreements that, in addition to reducing tariffs, aim at reducing all other elements that impact on trade flows. These other factors include both Non-Tariff Measures (hereafter, NTM) whose effect or objective is to protect domestic production against imports, as well as other structural elements that impact on trade, such as competition policies, procurement rules, standards and conformity assessments.

In recent years, several efforts have been made to quantify NTMs and compare their trade impact with the tariffs. In the process, researchers have calculated *ad valorem tariff equivalents* (AVE) for the NTM. Péridy has build on earlier methodologies to estimate the AVEs for a selection of six MPCs. Graph 14 compares the levels of tariffs with the levels of AVE for these countries. An inspection of that table suggests that the AVE levels are high in these countries and higher than tariff levels; in combination, the overall protection granted to domestic producers remains significant in Mediterranean countries despite efforts to reduce tariffs. The relative importance of NTM versus tariff levels as protection arsenals has been confirmed by a recent World Bank report on MENA countries which identified that NTMs remain a significant barrier to enhancing trade in general and exports in particular in this region. Hence, trade integration initiatives need to be broadened to include those NTMs whose objective is to protect domestic producers. Also, those NTMs that have legitimate objectives – which can often be excessively cumbersome in their implementation phase either by design or enforcement – need to be considered. Support for such initiatives could come in the context of support for “deep” integration initiatives of the FTA.

Graph 14: Overall protection in Mediterranean Countries: tariffs and NTMs (%)

![Graph 14](image)


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16. The term “Non-Tariff Measures” has replaced the term “Non-Tariff Barriers” (NTBs) since some measures do not always intend to be explicitly protectionist (e.g. some regulations or standards designed at increasing consumer safety).
19. This situation can be helped by well-targeted initiatives. For instance, ensuring that controls to guarantee that sanitary and phyto-sanitary standards (SPS) are adhered to require that the country has the necessary standards equivalence agreements and infrastructure to verify and enforce the adherence to the generally accepted standards. Support for such initiatives could come in the context of support for “deep” integration initiatives of the FTA.
Another aspect of “deep” trade integration and that in the last few years has attracted substantial attention relates to the transport costs and other logistics costs affecting trade costs. The World Bank has now issued its second Survey of Trade Logistics Indicators (TLI) (World Bank, 2011b). These TLI are substantially better in European countries than in Mediterranean ones (Graph 14). For instance, Lebanon’s TLI, which are the best of the MED region, are still substantially lower than the TLI of the average EU member state. Yet they are much better than those recorded for Jordan, Morocco, Algeria and Libya. Péridy estimated how improvements in these TLI could expand imports from the EU into the MED region and exports from the MED region and found that both transport costs and low TLI substantially hamper trade. Reducing tariffs further would only marginally lead to trade expansion between the EU and MED, but reducing transport costs and improving the TLI would result in substantial trade expansion.

Graph 15: The Logistics Performance Index in the Euromed area, 2010

Source: Derived from the World Bank, 2011, “Connecting to Compete”

Question C11 provided a “targeted” definition of deep integration with explicit reference to liberalization of agricultural and service trade as well as approximation of standards and technical legislation, which can be understood by the respondents to refer to the issues covered by NTM. The various respondents to the Survey indicate their general agreement with the view that deep integration would provide considerable added value over and above the shallow integration that is based solely on tariff reductions. Nearly 90% of respondents that expressed any view on the subject indicated that “deep” integration would have positive and very positive added value.

Graph 16: Assessment on the added value of the New Deep and Comprehensive Free Trade Areas to be established by the EU with the MPCs

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

V. References


EURO-MEDITERRANEAN FINANCIAL COOPERATION: WHAT FUTURE?

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I. Brief Overview of EU Policies and Funding Frameworks with Southern Mediterranean Countries

The 2011 uprisings in the Southern Mediterranean have put the region at the forefront of current policy developments, questioning their future domestic political systems and, subsequently, the future of the EU Partnership with its Southern Neighbourhood. Against this backdrop, this paper analyses the EU development funding allocated to the region over the past decade and provides an insight into the future of the Euro-Mediterranean Partnership based on the results of an opinion survey. The first section reviews the policy and financing frameworks governing Euro-Mediterranean relations; section two analyses the results of the Euromed Survey 2010 and provides an insight into the future of the Euro-Mediterranean Partnership.

1.1 Policy Frameworks and Funding Instruments for EU Cooperation with the Southern Mediterranean before 2007


Southern Mediterranean Countries (SMCs)2 have benefited from EU development assistance since the 1970s within different policy frameworks under which a series of bilateral agreements formed the backbone of EU funding to the region. Starting with the Global Mediterranean Policy (GMP) in 1972, Europe’s Southern Neighbours concluded cooperation agreements based on the three pillars of commercial, social and financial cooperation. The latter pillar built on financial protocols that specified aid volumes committed to SMCs. Financial and economic cooperation took three forms: grants, the European Investment Bank (EIB) and the European Commission (EC) 1% interest rate loans.

Europe’s enlargement to Greece, Portugal and Spain in the 1980s urged a redefinition of its relations with Southern Neighbours. The 1990 Renovated Mediterranean Policy (RMP) sought to reinforce the existing frameworks while providing them with narrower objectives and strategies. The €2.37 billion allocated for the period 1992-1996 represented an increase of 40% in commitments compared to the previous policy framework. It was aimed at supporting the implementation of the International Monetary Fund (IMF) and World Bank structural adjustment programmes, in particular the development of small- and medium- sized enterprises (SMEs), and financing regional cooperation initiatives. Trade relations were deepened through a duty-free access to European markets for agricultural goods in 1993. Support for South-South integration stands as the major innovation of the RMP, perceived as a stabilising factor for the region and the EU. The initiatives that followed the RMP reaffirmed the importance of regional integration with the ambition of creating a Euro-Mediterranean free trade area.

1. She is also Director of the Mediterranean Prospects Network – Medpro, medpro-foresight.eu.
2. The acronym SMC designates Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria, Tunisia, and Turkey.
1.1.2. 1995-2007: The Barcelona Process

In the aftermath of the Gulf War and the signing of the Oslo Accords in 1993, the 1995 Euromed Partnership went beyond the RMP by attempting to tie Europe’s stability wants to SMC socioeconomic development needs. In November 1995, the Barcelona Ministerial Conference marked a crucial shift in the way relations were previously structured by engaging SMC foreign affairs ministers in the final statement. While the previous approaches considered Mediterranean “third countries”, the Barcelona Conference which gave birth to the Euromed Partnership enacted the term of Mediterranean partners. The Partnership went a step further than other initiatives and was built on three pillars:

- Political cooperation and dialogue with the ultimate goal of achieving a prosperous and stable regional ensemble through the adoption by partner countries of measures encouraging democratic development and good governance;
- Economic cooperation and regional integration with the aim of achieving a free trade area by 2010;
- Socio-cultural cooperation by developing people-to-people contacts and a vibrant civil society through concrete initiatives.

On institutional grounds the Barcelona Process (BP) revoked the previous cooperation agreements by establishing bilateral Association Agreements (AAs) as the foundation of Euro-Mediterranean relations. AAs are concluded for an unlimited period of time and cover the three dimensions of the Euromed Partnership with slight differences between countries. Broadly, they consist of titles covering trade in goods and services, economic cooperation, social/ cultural cooperation and financial cooperation, the latter category specifying that funds will be allocated to help SMCs meeting the objectives set out in the AAs.

To achieve the objectives established in the AAs, cooperation initiatives are implemented in two steps under the BP. First, Country Strategy Papers (CSPs) adopted by the EC and SMCs sum up the political and economic situation of the country, give the “EU’s strategic response,” and detail the general as well as specific objectives of cooperation. National Indicative Programmes (NiPs) adopted by the EC and SMCs divide these objectives into priorities and sub-priorities. To meet the objectives set in the sub-priorities, funds are allocated to specific cooperation programmes and some of the latter fund initiatives in the beneficiary countries, such as awareness-raising activities and pilot projects. The implementation of regional cooperation objectives follows the same steps with Regional Strategy Papers (RSPs) and Regional Indicative Programmes (RiPs), both documents following the same structure as their national counterparts. Under the BP, CSPs/RSPs were drafted for the period 2002-2006. Two series of NiPs/RiPs divide their objectives for the periods 2002-2004 and 2005-2006.

The BP also institutionalised relations at the regional level by enacting conferences on foreign affairs at ministerial level aimed at monitoring the progress achieved in meeting the objectives set in the Barcelona Declaration. Several sectoral ministerial conferences were also born under the partnership such as agriculture, water, energy and health to name a few. In addition, the Euromed committee composed of senior officials of the EU, Member States and SMCs is responsible for the global administration of the partnership. The Euro-Mediterranean Parliamentary Assembly consisting of parliamentarians originating from the European, Member States’, and SMCs’ parliaments makes recommendations for the partnership. Furthermore, the 5+5 dialogue was created in 1990 as an informal structure bringing together foreign affairs and/or interior ministers of Spain, France, Italy, Malta, Portugal, Morocco, Algeria, Tunisia and Libya, Mauritania. This structure aims at reinforcing the BP by discussing all the issues affecting it. While the idea dated from the 1980s, the 5+5 dialogue materialised only in 1990. A first

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3. The Euromed Partnership/Barcelona Process targets Morocco, Algeria, Tunisia, Egypt, Israel, Palestinian Authority, Jordan, Lebanon, Syria and Turkey.
4. Israel is an exception since the EU-Israel AA does not contain a title on financial cooperation.
meeting was held in 1991 but the process stopped until 2001. Several meetings have been held since then, the last one in April 2010.

The Euromed Partnership also brought changes on financial grounds by creating the MEDA (Mesures d’Accompagnement) programme and the FEMIP (Facilité Euro-Méditerranéenne d’Investissement et de Partenariat), the latter being managed by the EIB. The MEDA programme revoked the financial protocols used to finance Euro-Mediterranean cooperation by providing financial and technical support to SMCS conditional on the implementation of mutually agreed reforms. Contrary to previous provisions, allocations are no longer given on a country basis but on a project basis. The MEDA programme lasted until the end of 2006 and had a total budget of €8.7 billion, split in two programming periods: MEDA I, from 1995 to 1999, with a total budget of €3.43 billion and MEDA II, from 2000 to 2006, with a total budget of €5.35 billion.

The FEMIP was established in 2002 and aims at improving the region’s private sector and SMEs’ access to finance. FEMIP benefits from a yearly allocation from the EU budget (€32 million per year for the period 2007-2013) and provided almost €6 billion of loans between 2002 and 2006. The FEMIP manages an additional financial instrument, the FEMIP Trust Fund (FTF). The FTF finances technical assistance and venture capital projects in the Southern Mediterranean with contributions from the EC and 15 Member States.

1.2. The European Neighbourhood Policy and the European Neighbourhood and Partnership Instrument

The EU’s 2004 and 2007 enlargements urged another redefinition of its external policies amid fears that Eastern neighbours’ attracted increased attention from Brussels to the detriment of SMCS. To avoid such a perception among its Southern Partners, the European Neighbourhood Policy (ENP) was created in 2007, embracing both Eastern and Southern countries. The ENP seeks to promote a closer political, economic, social and cultural and scientific dialogue while enhancing cross border cooperation and shared responsibility in the areas of security, prosperity, justice, regional stability, conflict resolution and prevention. Most of these objectives are already embedded in the BP and to take into account the heterogeneity of both regions as well as their experience in dealing with the Brussels institutions; the EU’s programming of assistance was split into East and South.

On institutional grounds, the entry into force of the ENP did not modify the structuring of bilateral relations, but on financial grounds it brought important changes for SMCS. While the MEDA programme targeted them specifically, the newly-born European Neighbourhood and Partnership Instrument (ENPI) is designed to benefit both regions. In absolute terms, the entry into force of the ENPI did not translate into lower commitments to SMCS. Yet prima facie figures shade the fact that the EU is increasingly shifting its attention towards its Eastern Partners. After excluding Israel, Lebanon and Palestine, average yearly per capita commitments to SMCS are lower than commitments to the Eastern Neighbourhood by a factor of 3. The table below gives the distribution of the ENPI’s commitments to both countries for the period 2007-2009.

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5. Countries under the ENP are Armenia, Azerbaijan, Georgia, Ukraine and Moldova, hereafter referred to as “Eastern Neighbours”.
6. Both Lebanon and Palestine benefit from important commitments for distress relief, rehabilitation and humanitarian aid.
Regional cooperation was not discarded under the ENPI: for the period 2007-2009, commitments to SMCs amounted to a total of €371.4 million. An additional instrument was also created: the Cross Border Cooperation (CBC) programme. The CBC’s objectives are fourfold: the promotion of economic development in bordering regions; support for secure and efficient borders; the promotion of people-to-people contacts; and cooperation in the fields of public health, the fight against organised crime, and the environment. The CBC has been allocated a total of €1.11 billion for the period 2007-2013, of which €355 million (a share of 31% of the CBC’s total budget) are committed to multi-country initiatives for the protection of the Mediterranean Basin and to Morocco and Tunisia for border protection programmes with Spain and Italy.

The entry into force of the ENP created another funding instrument managed by the EIB: the Neighbourhood Investment Facility (NIF). The NIF aims at supporting investments in infrastructures as well as in the private sector (with a particular focus on SMEs) in both the Eastern and Southern Neighbourhood. It benefits from a €700 million commitment from the EC and from voluntary contributions from 15 Member States, the latter amounting to €47 million in 2009.

Table 1: Country distribution of commitments under the ENPI’s bilateral cooperation for 2007-2009 (Euros million)

<table>
<thead>
<tr>
<th>ENPI</th>
<th>Average per year</th>
<th>Population (million, 2009)</th>
<th>Average per year per capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>146.99</td>
<td>49.00</td>
<td>34.90</td>
</tr>
<tr>
<td>Egypt</td>
<td>428.25</td>
<td>142.75</td>
<td>83.00</td>
</tr>
<tr>
<td>Israel</td>
<td>0.00</td>
<td>0.00</td>
<td>7.44</td>
</tr>
<tr>
<td>Jordan</td>
<td>227.12</td>
<td>75.71</td>
<td>5.95</td>
</tr>
<tr>
<td>Lebanon</td>
<td>206.09</td>
<td>68.70</td>
<td>4.22</td>
</tr>
<tr>
<td>Libya</td>
<td>10.04</td>
<td>3.35</td>
<td>6.42</td>
</tr>
<tr>
<td>Morocco</td>
<td>561.36</td>
<td>187.12</td>
<td>31.99</td>
</tr>
<tr>
<td>Occupied Palestinian Territory</td>
<td>1,256.61</td>
<td>418.87</td>
<td>4.04</td>
</tr>
<tr>
<td>Syria</td>
<td>110.86</td>
<td>36.95</td>
<td>21.09</td>
</tr>
<tr>
<td>Tunisia</td>
<td>255.09</td>
<td>85.03</td>
<td>10.43</td>
</tr>
<tr>
<td>Average South</td>
<td>320.24</td>
<td>106.75</td>
<td>209.49 (total population)</td>
</tr>
<tr>
<td>Average south except Israel, Lebanon and Palestinian Adm. Areas</td>
<td>248.53</td>
<td>82.84</td>
<td>193.78</td>
</tr>
<tr>
<td>Armenia</td>
<td>187.03</td>
<td>62.34</td>
<td>3.08</td>
</tr>
<tr>
<td>Azerbaijan</td>
<td>89.87</td>
<td>29.96</td>
<td>8.78</td>
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<tr>
<td>Georgia</td>
<td>474.12</td>
<td>158.04</td>
<td>4.26</td>
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<tr>
<td>Ukraine</td>
<td>677.31</td>
<td>225.77</td>
<td>46.01</td>
</tr>
<tr>
<td>Moldova</td>
<td>305.8</td>
<td>101.93</td>
<td>3.60</td>
</tr>
<tr>
<td>Average East</td>
<td>346.826</td>
<td>115.61</td>
<td>65.74</td>
</tr>
</tbody>
</table>

Source: OECD Creditor Reporting System (CRS) and Development Assistance Committee (DAC) databases
1.3. The Union for the Mediterranean

Since 2008, SMCs have benefited from an additional policy framework, the Union for the Mediterranean (UfM) enacted under the French Presidency of the EU. While Euro-Mediterranean relations have become deeper at each step, EU cooperation and assistance did little to enhance the overall economic and social situations of SMCs. Two reasons have been advocated by the UfM’s initiator Nicolas Sarkozy: first, while the EU acts as a unified block, SMCs are divided, hence hindering cooperation results. Second, EU initiatives were believed to be not visible enough. To tackle these two issues and to revive the optimism under the Barcelona Process, in July 2008 Euro-Mediterranean Heads of State created the Barcelona Process: Union for the Mediterranean.

While the initiative sought initially to target only European countries bordering the Mediterranean, after German criticisms the UfM was opened to all 27 EU members. The UfM consists of a total of 43 countries gathered around six concrete initiatives:

- De-pollution of the Mediterranean Sea,
- Establishment of maritime and land highways,
- Joint civil protection programme on prevention, preparation and response to natural and man-made disasters;
- Mediterranean Solar Energy Plan exploring the opportunities for developing solar energy in the region;
- Euro-Mediterranean University, inaugurated in June 2008 and based in Slovenia, and;
- Mediterranean Business Development Initiative, supporting companies operating in the region through technical assistance and access to finance.

Institutionally, the UfM builds on 2 bodies: the Co-Presidency and the General Secretariat. The Co-Presidency is held by an EU member and a non EU-member country and rotates every two years. Egypt and France held the Co-Presidency until the February 2011 popular uprising that led to the ousting of Hosni Mubarak. Since then, the Co-Presidency has been vacant. The UfM’s decisions are taken at the bi-annual summit of Heads of State and Government as well as during the Annual Conference of Foreign Affairs Ministers, based on an agenda prepared by a conference of senior officials whose headquarters are in Brussels. The General Secretariat, based in Barcelona, is responsible for the implementation of policies and projects identified and adopted by the UfM. After two years of delays, the General Secretariat took office in Barcelona in September 2010.

On institutional grounds, the UfM sets ambitious objectives and governance structures to advance in regional integration. On financial grounds, two additional instruments were created: the InfraMed and the Faro funds. InfraMed was launched in May 2010, with contributions from Caisse des Dépôts et des Consignations (CDC, France), Cassa Depositi E Prestiti (CDP, Italy), the European Investment Bank (EIB), Caisse des Dépôts et Garanties (CDG, Morocco) and EFG Hermes (Egypt). InfraMed is the first financial facility of the UfM and aims at financing infrastructure projects. Its commitments amount to €385 million and are expected to increase to €1 billion. The Faro fund was allocated a total of €1 million to fund innovative projects on both shores of the Mediterranean. Faro is managed by Invest in Med and provides entrepreneurs with seed capital up to €20,000 per project, financing half of its expenses.

7. In addition to the 27 EU Member States, the UfM brings together: Albania, Algeria, Bosnia and Herzegovina, Croatia, Egypt, Israel, Jordan, Lebanon, Mauritania, Monaco, Montenegro, Morocco, the Palestinian Authority, Syria, Tunisia and Turkey. Libya declined the invitation and has an observer status.
II. What Future for EU Funding in the Southern Mediterranean?

2.1 The EC’s Response to the Arab Spring: “A Partnership for Democracy and Shared Prosperity”

In line with the uprisings that started to rock the Southern Mediterranean in early 2011, it is useful to analyse the EC’s early reactions as far as future directions of ODA are concerned. The Tunisian, Egyptian, and Libyan uprisings took many actors and especially the EU by surprise. The strength, rapidity and coordination of civil society in overthrowing decades-old autocratic regimes demonstrated how impossible it is to continue past policies while ignoring peoples’ democratic and socio-economic aspirations.

The EU’s response to the “Arab Spring” and an embryonic vision of the future of its Neighbourhood Policy towards the Southern Mediterranean is embedded in the 8th March Commission Communication for “A Partnership for Democracy and Shared Prosperity”. Besides the immediate humanitarian assistance provided “to support democratic transition” in Tunisia and later Egypt, the Communication introduces several changes in the way the EU will conduct future policies towards the Southern Mediterranean.

First, the EU’s new approach builds more on the principle of “differentiation”. Under this principle, the EU will commit more resources to reforming countries. This “incentive based approach”, under which countries advancing fast in reforms will also translate into resources being shifted away from countries retracting from implementation of reforms. At the country level, the partnership for democracy and shared prosperity (hereafter referred to as “the partnership”) is likely to reinforce the current country-wise patterns of ODA commitments, since up to 10th May 2011 only Egypt, Jordan, Morocco, and Tunisia have agreed to reform/amend their constitutions with a view to increasing political freedom.

Second, a qualitative change is expected to take place in terms of support for democracy and institution building. While the promotion of democratic reforms and good governance ranked high in the EU’s approach to relations with the Southern Mediterranean, little has been effectively done and the language has failed to translate into concrete initiatives. Since the enactment of the Barcelona Process, OECD DAC data record a mere total commitment for support to NGOs of €1 million; and a study on democratic reform in Morocco states that EU pressure to promote democratic reform has been all but effective (Kheeka, et al., 2008). The creation of the Civil Society and Neighbourhood Facility aimed to be focused on advocacy capacities of civil society organisations (CSOs); their ability to monitor reform and participate effectively in the policy dialogue could potentially reverse past trends. More details as soon as they are released will allow further assessment of its effectiveness, especially in light of the existing “European Instrument for Democracy and Human Rights”.

Third, support for economic development is reaffirmed with proposals to increase the EIB’s lending mandate and calls on the Council to adopt EC proposals on EIB refinancing. Under the current arrangement, both the EIB and other financial intermediaries are not allowed to reinvest the funds from previous operations. According to the EC Communication, lifting this constraint would immediately free €120 million to finance new operations; an amount representing 32% of the concessional loans issued by the EIB to the region since 1995. Moreover, the amendment to the mandate of the European Bank for Reconstruction and Development (EBRD) advocated by the EC to allow the bank to undertake operations in the region would make additional resources available to finance operations in the region. The memorandum of understanding signed 1st March between the EC, the EIF and the EIB paves the way for the EBRD’s positioning in the region.

Fourth, the EC Communication recognises the need to adapt its regional cooperation strategy to the current situation prevailing in the region so as to focus on “projects delivering concrete benefits in energy, environment, transport, trade and social dialogue.” While the Lisbon Treaty urges the Union for the Mediterranean (UfM) to reform, a possible approach to grant the institution a new role could consist of transferring a share of the funds earmarked for regional cooperation to the UfM for the design and implementation of development projects matching the objectives of both the BP and ENP (Ayadi and Fanelli, 2011).

2.2 Public Perceptions of the Future of Euro-Mediterranean Relations

Against the backdrop of the profound changes in the EU’s Southern Neighbourhood and of the turbulent times in the Eurozone, let us now compare the EU’s early initiatives with the public perceptions of the Euro-Mediterranean Partnership and the likely development of Euro-Mediterranean relations. The European Institute of the Mediterranean (IEMed) conducts a yearly survey to assess the perceptions of the Euro-Mediterranean Partnership by academics, business community members, government officials, and CSO members from both the EU and SMCs. By focusing on their perceptions, the Euromed Survey is intended to evaluate the progress, achievements and shortcomings of Euro-Mediterranean relations.

2.2.1 A Need to Reform the ENPI

From the 2010 results, besides the perception of a low likelihood of an increase in commitments to SMCs for the period 2014-2020, four main issues emerge as far as current policies are concerned. First and foremost, a large majority of respondents to the Survey (70%) ranked a review of the current financial instruments and modalities for Euro-Mediterranean cooperation very necessary.11

Graph 1: Need for a review of the current financial instruments and modalities (regardless of the amount allocated) for Euro-Mediterranean cooperation (European Neighbourhood and Partnership Instrument and FEMIP) (%)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

10. Respondents had to assign a 1 to 10 probability to the event of an increase in commitments to SMCs. See annex B.13 for figures.
11. Respondents were asked to make a 1 to 10 ranking, 10 being the most necessary.
Analysis of open questions show that the EU’s lack of commitment towards genuine good governance and democratic reforms is widely criticised, so are the rules governing the procedures for the award of public contracts, believed to be excessively cumbersome, lengthy and resulting in the exclusion of aid actors. This can be particularly the case for aid actors with a relatively smaller administrative capacity, such as NGOs.

Second, Euro-Mediterranean actors call on an increased involvement of international financial institutions in the region, with many answers to open questions explicitly calling for the creation of a Euro-Mediterranean development bank. Such an institution was promoted by French President Nicolas Sarkozy in 2010 but divisions between Member States and most notably from Germany prevented the project from materialising. In this regard, the EC’s proposals on the EBRD’s involvement in the region can be interpreted as a step towards meeting the expectations of Euro-Mediterranean actors. The EBRD’s experience in Eastern Europe combined with the EIB’s practical experience in the region could create scope for enhanced cooperation in order to support development in SMCs. Moreover, to realise the potential of an increased presence of international financial institutions, their experience and product range could be expanded and procedures simplified so as to increase the number of potential beneficiaries in SMCs. For instance, the EBRD has a particular experience in promoting microcredit in the Eastern European countries and such an experience can be replicated in the SMCs.

Third, a reform of regional cooperation is viewed as a top priority for the respondents to the Survey. Euro-Mediterranean experts were asked to attribute a level of probability and priority to three prospective new financial instruments.12 The first instrument, the Mediterranean macro-region, inspired by the EU’s Strategy for the Baltic Sea13 was assigned both a moderate priority and probability, pointing at respondents’ scepticism both towards the instrument’s relevance in the Mediterranean context and the EU’s willingness to design such an instrument for its Mediterranean partners. Second, respondents were asked to repeat the same exercise, this time devising the SMCs participation in EU structural funds. Underlining stakeholders’ feelings about the need for an increased commitment to the region and perhaps the structural funds’ success in the neighbourhood, this option was assigned a very high priority as well as slightly higher probabilities. However, the most striking feature regarding the prospects for future financial instruments resides in the high priority assigned by respondents to a reform of the ENPI to finance multilateral projects.

Graph 2: Level of priority and a level of probability to new financial instruments which could eventually be implemented in the Mediterranean
(average on a scale of 0-10, where 0 stands for less, and 10 for more)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

12. See annex B.12 for figures.
13. According to the EC “Macro-Regional Strategies in the European Union”, “there is no standard definition for macro-region: the term has been used to describe both globally significant groups of nations (the EU, ASEAN etc.) and groupings of administrative regions within a country (Australia, Romania). The definition applied here, developed during the preparation of the European Union Strategy for the Baltic Sea Region, will be “an area including territory from a number of different countries or regions associated with one or more common features or challenges.”
The allocation for regional cooperation since the inception of the BP has totalled €1.54 billion, and its share in total commitments to the region by programming period has remained stable at around 10%. For the period 2007-2009, funds committed to regional cooperation have totalled €371.4 million, of which €96 million were committed to FEMIP and around €93 million to Erasmus Mundus and Tempus programmes, both initiatives representing a total of 50% of regional cooperation commitments. The remaining €185 million have been committed to multi-sector initiatives and cooperation projects in the fields of governance, civil society, transport, and energy and environment.

Several criticisms can be made of the current framework of regional cooperation. First, the total allocation for regional cooperation is dominated by three initiatives, two of which also benefit the Eastern Neighbourhood countries, hence negatively affecting the visibility of regional cooperation while raising questions about its precise goals. Second, within the ENPI's regional cooperation, CBC programmes of which Morocco and Tunisia are the main beneficiaries only add to the panorama of financial instruments for regional cooperation. Third, regional cooperation lacks precise objectives beyond the general ones set in the BP, let alone the resources to meet them. Fourth, there is no coordination between regional cooperation initiatives and bilateral cooperation programmes, the two pursuing different tracks. Fifth, with the creation of the UfM in 2008, specifically designed to promote regional cooperation, the ENPI's regional cooperation seems to be a doubloon, preventing resources from being invested in ambitious regional development programmes. Against this backdrop, rationalisation of initiatives, objectives and means of regional cooperation seem necessary. In line with respondents' perceived need to reinforce regional cooperation through ambitious development projects, resources under the ENPI's regional envelope for the Southern Neighbourhood could be channelled to the UfM. The institution would then become the main actor responsible for fostering regional cooperation.

2.2.2 Scenarios for the future of the Euro-Mediterranean Partnership

To draw a picture of the likely future of the Euro-Mediterranean Partnership in light of the current economic crisis, respondents were asked to assign probabilities of 1 to 10 to three positive and three negative scenarios concerning the long-term impact of the crisis on Euro-Mediterranean relations. The following three scenarios of a negative long-term impact of the crisis on the Euro-Mediterranean Partnership were submitted to assess their likelihood:

- The crisis would permanently reduce the EU's ability to mobilise resources for SMCs;
- The crisis would exacerbate social tensions inside the EU thus shifting its willingness to cooperate with SMCs;
- The crisis would urge the EU to resolve its economic problems without integrating SMCs in its strategies.

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14. Tempus IV is funded by the ENPI and encompasses countries from the Eastern and Southern Neighbourhood. The total programme has been allocated €124 million. Assuming an equal funding per country, commitments to SMCs under Tempus IV have amounted to €74.4 million. Source: European Commission ENPI Regional Info Notes, 2008.
15. For 2007-2010, initiatives include but are not limited to: Euromed Justice II (€5 million), Euromed Police II (€5 million, governance), Medenec II (€5 million energy and environment), Euromed Transport (€8.7 million). Source: ibid.
16. See annex C.1 for results on the positive and negative impacts of the crisis on Euro-Mediterranean relations.
Graph 3: Degree of probability of the following scenarios about the impact of the global economic crisis on the Euro-Mediterranean Partnership

(average on a scale of 0-10, where 0 stands for no importance, and 10 for very high importance)

- A negative long-term impact, as it will permanently reduce the ability of the EU to mobilise and make available resources for Euro-Mediterranean cooperation (6.16)
- A negative long-term impact, as it will intensify the social tensions in Europe and hence the resistance to cooperation with Southern Mediterranean Countries (6.18)
- A negative long-term impact, as it will highlight the focus of the EU to resolve its own economic problems without integrating the MPCs in its economic strategies (6.63)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

On average, the three scenarios were given high probabilities, with a majority of respondents assigning more than 5 to each of them. However, among these three scenarios, the one arguing that the exacerbation of social tensions within the EU would translate into higher reluctance to cooperate with SMCs is perceived as the most likely prospect. Sadly enough, the recent language used by some European politicians towards the arrival of illegal migrants fleeing Libya and Tunisia is illustrative of an unwillingness to cooperate with SMCs. In addition, the unilateral decision by France to restore border checks with Italy is illustrative of this. The French move is a de facto message sent to North African populations signalling the unwillingness to show solidarity with countries and peoples undergoing democratic reforms or even wars (Carrera et al, 2011).

The second scenario perceived as most likely is the one under which the EU would no longer be able to mobilise resources for SMCs due to its own economic and financial problems. Data already show that for the period 2007-2010 the Southern Neighbourhood has received significantly lower commitments than the Eastern on a per capita basis, reflecting an increased weight of Eastern countries in the programming of EU foreign policy. Moreover, the exacerbated tensions over Greece’s, Ireland’s and Portugal’s public finances are likely to shift away funds from ODA to SMCs. Hence, according to the Euromed Survey’s respondents, the actual patterns of allocations will remain stable, with additional resources being committed to resolve the EU’s own financial problems.

As regards a positive long-term impact of the crisis on the Euro-Mediterranean Partnership, the three following scenarios were submitted for respondents’ evaluation:

- The crisis will highlight the need for more cooperation and joint strategies across the Mediterranean;
- The crisis will reduce EU companies’ market shares, urging them to reduce costs and look for new markets in SMCs;
- The crisis will reinforce the need for the EU to integrate its near neighbourhood including the Mediterranean.
All three scenarios were assigned lower probabilities than the previous ones. Most experts on Euro-Mediterranean relations do not see an increase in cooperation and the development of joint strategies as a likely outcome of the crisis.

Notwithstanding the widespread perception of receding Euro-Mediterranean relations, the scenario in which EU companies expand to SMCs in order to regain the market shares they have lost in Europe is perceived as the most likely one among the three optimistic prospects. In such a case, Euro-Mediterranean cooperation would very likely shift from today’s paradigm of cooperation to an economy-driven structuring of relations.

The scenario consisting of integrating the neighbourhood in the EU economic area is also given higher probabilities. Probabilities are also higher for a scenario consisting of the integration of the EU Neighbourhood in its economic area. The previous scenario would translate into a reinforcement of bilateral and multilateral agreements in the fields of trade in goods and services, investment protection, competition, and intellectual property rights, while the second would imply the extension of the EU customs union and expand the common market. Consistently with these two trends, the process of regional integration and the long pursued objective of creating a Euro-Mediterranean free trade area are assigned high values by respondents. Should one of these two positive scenarios materialise, the EU and the Southern Mediterranean would become two regional players structuring their relations along economic frameworks while holding different political positions on the international stage (Sessa, 2011).

See annex C.2 for Survey results on the perceptions of the value of the Euro-Mediterranean area and of the process of regional integration.
Graph 5: Grading the added value of regional economic integration in the Mediterranean (in particular through the creation of the Euro-Mediterranean Free Trade Area) in relation to the general process of globalisation and global trade liberalisation
(average on a scale of 0-10, where 0 stands for no added value, and 10 for very high added value).

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

The prospective exercise undertaken by the Euromed Survey 2010 also shows two distinct and very interesting features to gauge the future of Euro-Mediterranean relations. EU-based respondents are consistently less optimistic about the future of the partnership than their Southern counterparts. The high likelihoods assigned to negative prospects for the Euro-Mediterranean Partnership and the surrounding pessimism of EU respondents suggest there is a sort of “neighbourhood fatigue” in the EU due to increased difficulties and uncertainties surrounding Europe’s own future. On the other hand, SMC respondents’ optimism conjectures the existence of an “EU appetite”.

This “neighbourhood fatigue” with Europe relatively less interested in its Southern Partners could very well translate into a situation in which other economic and geopolitical actors take over its influence in the region. Similarly, as with the prospects perceived for the future of Euro-Mediterranean relations, respondents were asked to assign probabilities to the likelihood of such an event while distinguishing between the Maghreb (Algeria, Libya, Morocco, Tunisia) and Mashreq (Egypt, Jordan, Lebanon, Palestine, Syria) countries.  

Graph 6: Assessment of the probability that the external economic actors, such as the United States, China, the Gulf countries or others, will gradually displace the prominent economic role of the EU in the Mediterranean
(average on a scale of 0-10, where 0 stands for low probability, and 10 for very high probability)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

18. See annex C.3 for Survey results on the likelihood of other external actors taking over EU influence in the region.
Answers show clearly different patterns for the two sets of countries. As far as the Maghreb countries are concerned, the EU is perceived as likely to remain the main external actor with respondents assigning moderate likelihoods (between 4 and 6) to a loss of EU influence in the sub-region. For Mashreq countries, the exact opposite holds with the likelihood of other actors taking over EU influence in the region perceived as very high (between 7 and 9). Both patterns of responses are consistent with empirical evidence on the increasing role of Chinese investments in oil rich Algeria and Libya as well as with the patterns of Arab ODA to Mashreq countries. China is increasingly present in Algeria, investing in the oil and infrastructure sectors to the point that the gains stemming from increased Sino-Algerian ties are put forward by Algerian officials to obtain more favourable terms with the EU on trade grounds. The proposal to Jordan and Morocco to join the Gulf Cooperation Council is also symptomatic of the increased presence of geopolitical and economic actors in the region. Should the negotiations succeed and both countries become part of the grouping, increases in trade, investment and development assistance flows are likely to increase, hence loosening EU influence in the region. Broadly speaking, in the coming years, the EU will very likely have to cooperate with Gulf countries in its Southern Neighbourhood: Libya’s popular uprising aimed at toppling Muammar Gaddafi is strongly supported by Qatar which markets oil on behalf of rebel forces in addition to lending military aircrafts to support the NATO led coalition, as do the United Arab Emirates; and Kuwait emerges as an important donor of humanitarian aid to the country.

III. Conclusion

Starting from the 1970s, the Southern Mediterranean has been targeted by different policies with growing commitments for development assistance simultaneous to an expansion and deepening of cooperation with the EU. Reflecting the diversity of political regimes south of its shores, EU development assistance has been concentrated in a few countries while the sector-wise distribution of commitments picture it as a donor governed by both altruist and commercial concerns, with an increasing interest in governance-related aid. However, as illustrated by the popular uprisings triggered by repressive political regimes and poor socio-economic conditions, despite increasing amounts committed for development assistance, little has been achieved.

Today, the combined uncertainties arising from 2011’s revolutions and the EU’s unprecedented economic crisis question the actual frameworks governing Euro-Mediterranean relations as well as the objectives and resources devoted to meeting them. As the resolution of EU internal problems and ultimately the safeguarding of the Eurozone will shift away increased resources from Southern Mediterranean countries, a rationalisation of funding instruments and a reinvigoration of the UfM are necessary to support the development of the Southern Mediterranean.

Rethinking the Euro-Mediterranean policies seems more necessary than ever against the backdrop of a growing presence of other geopolitical actors in the region. Indeed, as the latter acquire more influence in the region, a scenario under which Euro-Mediterranean relations are confined to a set of common interests as well as policies in well-defined areas and different positions in others is increasingly likely. Yet to maximise the benefits of such a scenario, important changes need to be implemented.

19. At the 10th EU/Algeria Inter-Parliamentary Meeting held on the 6th and 7th October 2010, Algerian deputies explicitly said that the increased trade and investment relations with China in particular and Asian actors in general are resulting in the EU losing ground in the country. Their remark was in a context where the AA is being renegotiated on Algeria’s request. The country pushes for a review of the tariff dismantlement schedule, safeguards for its industry and calls for more EU based FDI.
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LIBERALISATION OF AGRICULTURE TRADE AND FOOD SECURITY COOPERATION

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Since the Barcelona Process was launched in November 1995, the European Union (EU) has been attempting to expand relations with ten Mediterranean Partner Countries (MPC). Initially, the ambition was to gradually create a geo-economic pole of substantial influence in a multipolar world. To do so, cooperation had to be multidimensional, simultaneously involving the political, economic and socio-cultural dimensions. However, in 2011, there is no denying that the disappointments have been greater than the successes. The Mediterranean’s major geopolitical problems have worsened and integration remains limited. And even though cooperation between Europe and the MPCs has been rolled out in several important areas, regional development has not advanced.

I. Agriculture: a Forgotten Strategic Sector

Seemingly, certain evident geopolitical issues have been left on the sidelines in the Euro-Mediterranean debate since 1995. This is the case of agricultural exchange, life in rural areas and food security. As in all development policies in the last third of the 20th century, agriculture has also been relegated under Euro-Mediterranean cooperation. That is despite the fact that, as evidenced by the following inter-sectoral panorama, the stakes are huge in the MPCs:

- Matching demographic growth to feed ever larger populations (the region has expanded from 158 million inhabitants in 1980 to 290 million in 2010, and the MPCs are expected to reach 336 million by 2020);
- Produce with less water and land resources (with the exception of Turkey, acute water stress and almost all arable land already being cultivated in the MPCs) while adapting to harsher climate restrictions (i.e. recurring droughts, desertification);
- Adapt the range of products on offer to urbanised, “westernised” consumers’ evolving demands who are more focused than ever on their health (i.e. nutritional quality, food security and alimentary diversity);
- Guarantee food access despite the deterioration of purchasing powers and the sustained increase of raw material prices (i.e. the escalating prices of basic raw materials, such as cereals, which are consumed in large quantities in the region, severely undermine Mediterranean household budgets);
- Create activity and wealth in rural areas (where 30 to 40% of the total population continues to live and where the agricultural sector, on average, employs 25% of total salaried workers and three quarters of the total labour force);
- Better organise the agriculture and food chain to improve production and distribution while reducing losses;

1. Sébastien Abis, CIHEAM Director and political analyst on Euro-Mediterranean issues. These are the author’s personal opinions and not a commitment on the part of CIHEAM.
2. Algeria, Egypt, Jordan, Israel, Lebanon, Morocco, Syria, Occupied Palestinian Territory, Tunisia and Turkey.
Secure foreign supply to meet Southern Mediterranean demands, which far exceed national supply capacity;
Strengthen production quality by optimising agricultural sector procedures (i.e. meet regulatory requirements) and develop operators able to participate in free trade.

1.1. Misconceptions and Fearfulness Prevail on the Euro-Mediterranean Agriculture Debate
These issues have gained recognition since 2008’s agricultural crisis and several international organisations’ mea culpas, including the World Bank’s, which have finally reaffirmed agriculture’s strategic nature in development. Notwithstanding, this sector has been neglected under Euro-Mediterranean cooperation since 1995. Accordingly, despite the progressive creation of an economic free trade area, agricultural products were confined in a separate category. The subject was then perceived as explosive as there were and still are fears, particularly within European countries, of a possible competition between the two shores of the Mediterranean (particularly because they produce the same product ranges: olive oil, flowers, fruit and vegetables).

Graph 1: Assessing the potential impact of full agricultural liberalisation on the EU Member States (average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

The conflictive nature of the subject is rooted in Mediterranean farmers’ scepticism towards opening markets. Instead, Northern farmers have preferred to focus on EU specificity and the Common Agriculture Policy’s (CAP) mechanisms while Southern farmers are more concerned about the collateral effects of a further liberalisation of Euro-Mediterranean exchanges.

Graph 2: Assessing the relevance for the next Ministerial Meeting in the field of food security, agriculture and rural development: of gradually extending the CAP to Mediterranean Partner Countries (average on a scale of 0-10, where 0 stands for very low, and 10 for very high)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
The Survey also revealed that the experts, particularly those from European countries, questioned the possibility of the EU offering unfettered access for MPC agricultural products in the future.

Graph 3: Probability of the EU offering to the Mediterranean Partner Countries anytime in the foreseeable future a full agricultural trade liberalisation to access the single market free of any barrier (average on a scale of 0-10)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

1.2. Differentiation and Hesitation within the Europe-Mediterranean Agricultural Liberalisation Process

It was not until 2003 that the first Euro-Mediterranean Agriculture Ministers conference was organised, in Venice, under the Italian Presidency. Its conclusions focused on rural development, promoting the quality of agricultural products and supporting organic agriculture. Given its institutional format, this meeting was unique in the history of Euro-Mediterranean cooperation. In 2005, some progress was made: a Monitoring Committee was set up on a “Euro-Mediterranean Agriculture Roadmap” and, most importantly, that same year, the EU decided to open negotiations with the MPCs to further liberalise trade in agricultural and fishing products, whether fresh or processed.

Therefore, from 2006, the European Commission addressed the agriculture chapter bilaterally with those MPCs who so wished. The goal was to expand the agricultural liberalisation agreements with new negotiation rules, characterised by reciprocity (the effort was to be shared between the EU and the MPCs). However, the gradual, progressive approach was maintained, using the principle of temporal asymmetry (with the EU accepting a slower rhythm of liberalisation in the MPCs). Furthermore, it was recommended that exception lists will be drawn up for each country detailing the most sensitive products not to be included in the liberalisation process. Notwithstanding, negotiations have moved very slowly since 2006. This fact doubtless explains why the Survey’s experts have given the progress achieved in the agricultural process an average grade of 4.9 (where 0 stands for very disappointing progress and 10 for positive progress).
In 2007, Jordan and then, in 2009, Egypt and Israel signed an additional liberalisation agreement with the EU to include agricultural products. The asymmetry principle is not applied in Israel’s case as it is not a “developing country”. For Egypt, the agreement anticipates giving the EU free and immediate access to the Egyptian market for almost 90% of agricultural and fishing product exports, excluding tobacco, wines and spirits and pork meat (which is banned) and sugar products, chocolate, pasta and baked goods, for which customs excise duty will be reduced by half. In return, the EU’s market will be liberalised for all products, except tomatoes, cucumbers, rice, artichokes and strawberries, among others, for which the current agreements will remain in force.

In April 2011, the EU decided to exempt Palestinian agricultural and fish products from customs duties, although trade remains limited in this sector. All agricultural products, fish and fisheries products from the West Bank and the Gaza Strip are exempt from customs duties for a transitional period of ten years, which may be renewed. However, fruit and vegetables are not covered by the abolition of customs duties. Finally, negotiations are continuing with Lebanon and Tunisia. The institutional transition underway in these countries may change or accelerate the negotiation process depending on the decisions taken by the new authorities.

The negotiation process with Morocco was rife with difficulties. It was not until December 2010 that Brussels and Rabat reached an agreement, under the Belgian Presidency of the EU, as Spain took great care to exclude this issue from its political agenda given the scale of criticism coming from the Spanish agricultural sector. The agreement signed covers reciprocal liberalisation measures on the trade of agricultural, food and fish products. It envisages strengthening the position of European exporters on the Moroccan market (in particular for processed products). This represents an important offensive for the EU where full liberalisation will be progressively introduced in the next ten years. In the agricultural products sector, the agreement will enable the immediate liberalisation of 45% of the EU’s exports, in terms of pecuniary value, increasing to 70% by 2020. The fruit and vegetable sector, canned food, dairy products and oilseeds will be subject to full liberalisation. This agreement only sets quotas for the six products considered sensitive, such as tomatoes, courgettes, cucumbers, garlic, mandarins and strawberries. However, those new quotas are higher than in the past. The EU and Morocco have also decided to broach discussions on the protection of geographical indications (GI) considering that six Moroccan products already benefit from this classification. It is notable that the European Parliament (EP) must still ratify or reject the agricultural agreement with Morocco (following the Treaty of Lisbon, the Parliament must now
authorize all international agreements negociated by the European Commission with third party countries). Nonetheless, there have been recurrent protests against ratifying, as evidenced by the lobbying activities conducted by Copa-Cogeca (EU agricultural and cooperatives union) in Brussels and several local authorities from Southern Europe. The vast majority of MEPs on the Agriculture Committee have, moreover, already stated their opposition to the Morocco agricultural agreement. The Trade Committee’s members have taken a far more nuanced position. In principle, this case will be examined by the EP plenary in June 2011.3

At the same time, the EU encourages the liberalisation of South-South trade, particularly through the Agadir Agreement, an initiative which receives technical and financial support from the EU and aims to establish a free trade area among four Southern Mediterranean Countries (Jordan, Egypt, Morocco and Tunisia). But, here again, progress has been slow and agriculture is not a priority.

Many scientific studies, including some driven by CIHEAM (Centre international de hautes études agronomiques méditerranéennes), have focused on the economic, social and environmental risks to the MPCs agriculture sector, which is mainly based on small family farms, ill-equipped to face the competition pressures derived from liberalised trade, and most often disconnected from local and national trade markets (urban consumption is essentially covered by foreign supplies). Moreover, it is worth noting that, in the fruit and vegetables sector, the MPCs already benefited from considerable preferential treatment in their access to European markets. Most studies on liberalising agricultural trade in the Mediterranean region also note the limited impact this process has on trade given that MPCs’ agricultural supply growth is limited by the increasing environmental constraints.

It should also be highlighted that, based on Eurostat data, agriculture’s share in total MPC exports to the EU in 2010 stood at less than 10% for most of those countries, with the exceptions of Morocco (25%), Lebanon (17%) and the Occupied Palestinian Territory (60%). Moreover, the MPCs represented a mere 7% of total European agricultural imports while absorbing close to 13% of EU agricultural exports. As a reminder, only Morocco and Turkey regularly post positive agro-trade balances with the EU-27. In general terms import-export flows favour Europe: around 7.7 billion in agricultural imports from the MPCs in 2010 (of which 45% from Turkey and 25% from Morocco), but 12 billion in exports to the MPCs. These impacts and realities are relatively unknown in public opinion and among some experts according to the Survey’s results.

Graph 5: Assessing the progress in trade liberalisation of agriculture and processed agricultural products in the Euro-Mediterranean framework (average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the iEMed based on the results of the 2nd Euromed Survey

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3. Please note the last version of this article was submitted in May, 2011. Therefore, the paper does not reflect any later events.
II. Knowing How to Link the Regional and the International Dimensions

The Survey has revealed that most people, in both Europe and the MPCs, believe that progress in Euro-Mediterranean agricultural liberalisation has been disappointing, particularly because of the slowness of its progress and European protectionism in this area. In this regard, the competition risks as well as the lack of public willingness within the EU to open up agricultural trade to MPCs are regularly mentioned. On the other hand, people rarely refer to the possibility of complementarily creating a shared Mediterranean supply both in the Euro-Mediterranean macro-region and across the rest of the world.

We should also bear in mind that this process does not solely depend on the evolution of Euro-Mediterranean relations: the liberalisation of agricultural trade in the Mediterranean is part of the WTO’s broader framework where, in addition to Doha round deadlock, MPCs are split among different negotiating trade groups. As is the case within all international bodies, there is no common Euro-Mediterranean or even Mediterranean voice. Furthermore, another important observation is the progressive erosion of the EU’s market share in the MPCs’ agricultural trade. Increasingly, their imports are coming from agricultural powerhouses outside the region: the United States, Russia, Ukraine, Canada or Argentina for cereals and Brazil, which has recently become a key partner for Mediterranean Arab countries, for meat, poultry and sugar.

Another strategic factor in the ongoing negotiations and Euro-Mediterranean agricultural trade is the thorny issue of Sanitary and Phytosanitary Standards (SPS). This is the hidden dimension of the liberalisation process. Although customs measures are progressively disappearing, non-tariff barriers are slowly being erected. As a matter of fact, the EU is increasingly concerned about the quality and safety of imported products. In the context of globalisation, food security risks are growing. The policies put in place on this issue are drastic. Considerable regulations have been produced to provide consumer health, to such an extent that we can even speak of a veritable “health shield” being created around Europe’s borders. Therefore, even for those MPCs that are involved in the opening of trade with the EU, gaining access to the internal market is becoming more complex. Within this perspective, the creation of national food security agencies has often been advocated by the EU and special mention is made of SPS standards in all official publications on Euro-Mediterranean trade. Provisions on respecting international SPS standards obligations are included in all EU-MPC agreements. This has two goals: to increase qualitative food security within the MPCs and to facilitate Euro-Mediterranean trade. Some programmes are already set up and running. Worthy of mention are twinning projects.
on SPS between European civil servants and civil servants in some MPCs. If progress is not made on SPS standards, animal health and improved product traceability, broaden agricultural trade would be problematic. This crucial point of regulatory convergence is also mentioned regularly in the Survey.

Graph 7: Assessing the relevance for the next Ministerial Meeting in the field of food security, agriculture and rural development: Activities in the area of sanitary and phytosanitary norms (average on a scale of 0-10, where 0 stands for very low, and 10 for very high)

III. Moving Beyond Trade and Thinking Geopolitically

The scope of these issues reminds us that Euro-Mediterranean agricultural trade cannot be purely defined as a free trade issue. It is worth strengthening the geopolitical dimension of this area of cooperation, where socio-demographic, economic, sanitary, cultural and environmental challenges all come into play.

A broader perspective of agricultural and food issues in the region has been considered within the framework of the Union for the Mediterranean (UFM). It is true to say that this initiative, which is more focused on specific solidarity projects, comes at a time when agriculture has returned to the forefront on the international scene. Thus, at the UFM’s founding summit, held in Paris on 13th July 2008, the 43 participating countries adopted a joint declaration in which food security, climate change, desertification, water management and food safety were cited among the partnership themes to be developed. In Marseilles, in November 2008, the UFM’s Ministers for Foreign Affairs identified four major themes to achieve progress in Euro-Mediterranean agricultural cooperation: sustainable development of rural areas, promotion of quality products and geographical indications, strengthening SPS standards and coordinating agricultural research and training. This was the result of meetings between high-level civil servants organised in 2008 in which CIHEAM played the role of technical secretariat.

Unfortunately, since the debate in 2009, the UFM has stagnated and suffered the political ups and downs of a Mediterranean region where agitation has only increased. The current upheavals in the region have provoked serious doubts regarding the UFM’s future and, generally, there are many clouds on the horizon of Euro-Mediterranean cooperation. November 2008’s Marseilles Declaration scheduled a Euro-Mediterranean ministerial meeting on agriculture, rural development and food security. Egypt volunteered to host the event, which has not been held yet because of the political climate in the region. As the Survey’s results show, this ministerial meeting could be made a strategic meeting in order to accentuate the agriculture’s geopolitical dimension in Euro-Mediterranean cooperation. Of the 10 planned topics, most are appealing, although issues surrounding rural development and relating to the CAP were prioritised by respondents, with grades of 7.51 and 7.45 respectively.
Graph 8: totals Assessing the relevance for the next Ministerial Meeting in the field of food security, agriculture and rural development:
(average on a scale of 0-10, where 0 stands for very low, and 10 for very high)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

IV. Future Perspectives

On a purely commercial level, implementing deepened free trade agreements could be prioritised with the aim of achieving fuller integration between the EU and the MPCs. It is possible to envisage this sort of agreement with the MPCs who have advanced status with the EU (Israel, Morocco, Jordan and soon perhaps also Tunisia). Moreover, monitoring the consequences of agricultural liberalisation between the EU and MPCs with agreements in this area will be essential. Destabilisation of family farmers, aggravation of food dependency, crisis in rural areas and heightened pressure on natural resources are often mentioned as the potential risks posed by this process. The debate is lively as regards the temporary asymmetry to be used and the means mobilised to facilitate the adaptation of agricultural systems in MPCs.

Graph 9: Assessing the potential impact of full agricultural liberalisation
(average on a scale of 0-10, where 0 stands for very negative impact, and 10 for very positive impact)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
Politically speaking, this seems an immense task in the light of European reticence concerning developing agricultural relations with MPCs. The fears regarding trade and its economic impact undermine understanding of a major issue. Ways of stimulating regional cooperation should be explored while monitoring the social and environmental effectiveness of agricultural free trade agreements. To tackle market volatility and respond to cereal shortages in Mediterranean Arab countries, would we not envisage the establishment of emergency regional stockpiles? To spare the environment and preserve natural resources, at a time when climate related change is accelerating, would we not strengthen both technical and scientific multilateral actions on water and land? Are there no advantages to creating synergies among the region’s producers in order to increase consumption of local foods and collectively promote the Mediterranean diet in Europe and across the globe? Would it not be worth reflecting on possible links after 2013 between the future of Europe’s Common Agricultural Policy (CAP) and its action strategy in Mediterranean countries? This type of question was raised in the contents of the Survey. To an extent, they aim to reframe the triple question on the future of the Mediterranean, its relationship with Europe and the role that agriculture can play in strategically connecting these two geographical groupings with a shared destiny. Naturally, they are subject to the growing constraints weighing on the region (European weaknesses, distrust of the Euro-Mediterranean idea, lack of finance, degradation of multilateralism) and the emergence of new dynamics (multinational companies, political changes, penetration of the BRIC nations...).

Managing food insecurities in the Mediterranean region will become a geostrategic issue in the years to come. So, promoting and assuring a long-term vision is urgently needed. The recent events in the Arab world showed to what extent groups with low purchasing power and limited access to basic foodstuffs (bread, oils, sugar) join and supplement mass protests. Just like rising food prices, the problem of poor development in rural inland regions is an essential factor in the rebellions that have cut across the south and east of the Mediterranean. If Europe is serious about a real partnership that listens to the priorities of its southern neighbourhood, it can no longer ignore certain agricultural and rural realities. Bypassing this issue would underestimate the geopolitical threats that could stem from food insecurity and would represent a refusal to radically reform the bases of Euro-Mediterranean cooperation.

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CIHEAM Website: www.ciheam.org
THE EURO-MEDITERRANEAN COOPERATION IN THE WATER SECTOR: ASSESSMENT OF PROGRESS AND EMERGING PERSPECTIVES

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Introduction

The Union for the Mediterranean (UfM), launched in July 2008, was conceived as an initiative to reinforce the Euro-Mediterranean Partnership with the aim of addressing the common challenges facing the region. The idea was to make the integration between the two shores of the Mediterranean more visible to civil society through the implementation of regional and sub-regional projects. The environment has been at the core of the UfM process, which has stressed the consequences of climatic change on global food security, the need to introduce a common strategy for water sector management and the de-pollution of the Mediterranean Sea.

I. Priorities of Water Cooperation within the Framework of the Euro-Mediterranean Partnership (EMP)/Union for the Mediterranean (UfM)

As the Survey reveals, the assessment of the priority level of water cooperation within the framework of the EMP/UfM initiative shows a high concentration of responses (58%) on the positive side of the spectrum (7 to 10 on a scale of 0-10), 27% of total responses with median values (4 to 6), and only 14% with low values (0 to 3). The responses received reflect a different perception of the level of priority of water cooperation between the EU-27 and the MPCs, with the EU-27 above the Survey mean, while the MPCs are below the mean. Moreover, the answers to the open question D3 express a degree of disappointment of the MPCs regarding the level of priority of water cooperation in the framework of the EMP/UfM. In particular, it is evident that the Mashreq countries consider water not only a matter of survival but also a source of political instability and they expect a major involvement of the EU-27 in the political aspects of water cooperation. Conversely, the EU-27 assigns a high level of priority to cooperation in the environmental sector and to measures aiming to promote economic efficiency in the management of water resources.

The academic respondents as well as the women respondents seem more concerned about the impact of climatic change on the world water supply, while the NGO respondents emphasise more the water-related political and social issues.
Disaggregating the data among the MPCs, a greater acknowledgement emerges of the priority of water cooperation within the framework of the EMP/UfM initiative in Mashreq than in Maghreb countries. These differing assessments could be attributed to the higher expectation of Middle Eastern countries regarding the UfM process and the particular relevance of water issues in this sub-region. In the Middle East, we find the lowest index of per-capita water availability (Israel, Jordan, and the Occupied Palestinian Territory) along with the concentration of three international river basins (the Jordan, the Tigris and Euphrates, and the Nile) which represent a source of conflict between the riparian states (Ferragina, E., 2008). Such differing levels of perception among the MPCs are not evident among the Mediterranean and non-Mediterranean countries of the EU-27: the priority of water cooperation within the EMP/UfM framework is evaluated in almost the same way among the members of both groups (6.9 for the Mediterranean EU-27 countries versus 7.17 for the rest of the EU). It is interesting to note that the non-EU European countries show a perception of the importance of water cooperation in UfM policy which is higher than the Survey mean and also slightly superior to that of the EU-27 (7.30 against 6.70 and 7.20).
II. Assessment on Priorities for Water Projects as Identified in the 3rd Ministerial Conference on Water

The 3rd Conference on Water held in Jordan in 2008 to define the long-term Strategy for Water in the Mediterranean (SWM) was focused on: adaptation to climatic change, balance between water supply and demand, conservation and rehabilitation of natural environments, de-pollution of the Mediterranean, as well as technologies and efficient use of water. Regarding priorities for water projects identified during the Conference, Technologies and efficient use of water is considered the first priority at 7.90 on a scale from 0 to 10 since 48% of the respondents rated this very high (9-10), 32% high (7-8), 13% median (4-6), 4% low (2-3), and only 2% very low (0-10). The second mentioned amongst the five top priorities is Conservation and rehabilitation of natural environments (7.47), which shows 37% of respondents rating this very high, 33% high, 25% median, 5% low, and 1% very low priority. Third in importance is the De-pollution of the Mediterranean (7.45), which 38% of the respondents consider a very high priority, 32% high, 24% median, 4% low and 2% very low. Balance between supply and demand is the fourth priority (7.31), identified as a very high priority by 33% of the respondents, high by 38%, median by 24%, low by 4% and very low by 1%. In last place is Adaptation to climatic change (7.00), which was considered by 33% of the respondents a high priority, and by 29% very high.

Graph 3: Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008)
(average on a scale of 0-10, where 0 stands for very low, and 10 for very high)

Considering the importance attributed to the different themes, it is worth noting that the technological aspects range first in the list of priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water. Adaptation to climatic change is the last one, although this question must be considered the most important emergency in the Mediterranean for its strong effects on all the other priorities in the water sector. These results express a tendency – which is common to all the environmental issues – to give more importance to proactive rather than preventive actions in order to face water challenges in the Mediterranean. The open question D4 confirms these results and gives additional details about the level of importance for each of the priorities of the MPCs. The acquisition of skills and the implementation of policies are considered very important in order to improve access to water resources in a context of growing population and climatic change. Special attention is given by academic respondents to the research programme and measures to contrast climatic change, while the women seem more worried about the future impact of global problems such as pollution, population growth and climatic change.
III. The Strategy for Water in the Mediterranean: Prospects for Progress over the Short Term

The 3rd Euro-Mediterranean Ministerial Conference on Water, held in Amman in 2008 within the framework of the UM, defined the priorities of the Strategy for Water in the Mediterranean (SWM) that should have been approved in 2010. The 4th Euro-Mediterranean Ministerial Conference on Water held in Barcelona on 13th April 2010 was supposed to launch a comprehensive water strategy providing lines of actions agreed by all countries in the UM, with the approval and participation of civil society and different stakeholders. The main thematic fields envisaged were: governance in the water sector, water demand management, adaptation to climatic change, improvement of water efficiency and increase in the use of non-conventional resources. The guidelines mainly referred to the technical aspects of this strategy, but no reference was made to the conflictive role of water in the Mediterranean. This strategic aspect emerged during the 4th Euro-Mediterranean Ministerial Conference on Water held in Barcelona on 13th April 2010, influencing the outcome of the conference. The introductory document included a declaration regarding the contribution of the SWM to eradicating the root causes of difficulties, including the problems in the Occupied Palestinian Territories, and this statement provoked a formal protest by Israel. Another source of disagreement emerged in the recommendations for action included in the SWM, when the need was highlighted to promote tangible actions to improve cooperation in the trans-boundary basins using the instruments for conflict prevention of international law, such as the UN Convention on the Law of Non-Navigational Uses of International Watercourses. This reference provoked the opposition of Turkey, which requested that the reference to the UN Convention of 1997 be replaced by the term “agreed principles”. In conclusion, the SWM was not approved by the 43 member states mainly due to political reasons and this result made evident the need to launch a confidence-building process among the participants.

The political problems that obstruct the launching of the SWM also emerged in the answers of the respondents concerning cooperation in this field. The level of knowledge and perception regarding Euro-Mediterranean water cooperation is not positive for the majority of the respondents (63.4%), with essentially the same value for both the EU-27 (30.4%) and the MPCs (30.6%). Some differences emerge between the different sub-areas, with a stronger knowledge among the Mediterranean EU countries in comparison with the rest of the EU, and a better perception on the part of the Maghreb countries – which are more involved and have a better knowledge of the EMP – than the Mashreq countries.

Among the eight cross-cutting objectives mentioned in the draft declaration of the April 2010 Conference held in Barcelona that produced the SWM, the best prospects for progress in the short term are envisaged for Supporting research in all water aspects such as desertification and climatic change, for which 55% expressed very positive or positive views, and Increasing citizens’ awareness of the value of water and its culture, with 52% of responses. The same prospects on progress are attributed to Ensuring the capacity-building of water management and environmental protection (52%). The worst prospects according to the respondents are in the field of Ensuring the integration of policies, with positive or very positive views representing only 25% of the total. The assessment of the UM project Sustainable Water Management and De-pollution of the Mediterranean shows a high concentration of responses (58%) with median values (4 to 6 on a 0-10 scale), and a relatively similar distribution of the remaining answers on both sides of the spectrum (18% disappointed and very disappointed, and 23% positive or very positive). A more favourable assessment emerges of the regional programme MEDA WATER – Resource management, which aims to reinforce cooperation: 41% of the experts and actors who answered the Survey expressed positive or very positive opinions, 53% of responses indicated median values, and 7% negative or very negative views (7%).
Graph 4: Assessment of the prospects for progress over the short term of the objectives of the Strategy for Water in the Mediterranean
(average on a scale of 0-10, where 0 stands for very negative, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

The assessment of the progress of the different objectives of the SWM shows a more optimistic view concerning the scientific, technical and cultural aspects of cooperation in the water sector and a less optimistic view regarding the integration of policies, the participation of stakeholders and the introduction of fair and socially sensitive measures of cost recovery. Comparing the assessment of the UFM project to de-pollute the Mediterranean with the MEDA Water Programme, the concentration of answers with median values for the UFM project appears related to the difficulty of giving a clear opinion about a new project. Conversely, it is easier to express a view about a project that has already produced some results.

IV. Water and Security in the Mediterranean

The failure of the approval of the SWM during the Barcelona Conference confirms that today the great global challenges, such as environmental change or the depletion of natural resources, are turning into strategic issues and influencing international peace and security (Buzan, B., 1998). The connection between security and the environment comes to the fore wherever a struggle for the control of natural resources aggravates conflict situations or, conversely, whenever a conflict causes the destruction of natural resources — or when the increasing frequency of extreme climatic events determines migrations of so-called “environmental refugees”, and leads communities to compete for the two fundamental resources for survival: land and water. In 1993, Myers indicated environmental degradation as a potential risk for international peace and security, although he did not regard it as the exclusive cause of political instability (Myers, N., 1996).
In the context of political uprising in the MPCs, the environmental challenges and in particular water availability will condition the forthcoming events and the economic and political equilibrium in the region. This is the case of competition between Jordan and Saudi Arabia for the exploitation of the Disi Aquifer, a non-renewable (fossil) aquifer (Ferragina, E. and Greco, F., 2008). The two countries do not exchange information or cooperate in the management of this shared resource, resulting in a “tragedy of the commons” – that is, a situation where attempts to maximise the satisfaction of individual needs leads to the depletion of scarce natural resources. In a country such as Jordan, affected by a strong agro-alimentary deficit, the increase of prices in the staple food market in a context of increasing water stress is likely to influence the political stability of the Kingdom.

Another emblematic case of the connection between security and environment in the Mediterranean is the Arab-Israeli conflict (Ferragina, E., 2008). Here we find competition for both land and water – the one inseparable from the other – and the devastating effects of the war on the environment and natural resources. A reconstruction of the hydropolitics (Ohlsson, L., 1995) in the area shows the priority by Israel to control the main surface and underground water resources of the Jordan basin to guarantee the country’s hydraulic security in a hostile regional environment. The lack of cooperation in the water sector has legitimised a race for the exploitation between the co-riparian countries with strong environmental effects. The Tigris-Euphrates Basin is another area where water and security are closely linked. Turkey’s Gap project in the South-East of Anatolia is conditioning the water availability of the two downstream riparian states: Syria and Iraq; it is also influencing the political situation in the Kurdish area. As mentioned before, conflicts cause the destruction of natural resources. Libya, currently under NATO-led attack, is concerned about possible serious damage to the Great Man-Made River Project (GMMR), a 33-billion-dollar project aiming to exploit the underground fossil Nubian Sandstone Aquifer System to supply water to the populous coastal areas. According to official Libyan sources, damage to the pipeline could leave 4.5 million inhabitants without drinking water (Brown, L., 2011).

All these examples confirm the very sensitive role of water in the area. At the regional level, transboundary water resources have created a climate of hostility between the co-riparian countries, preventing strong cooperation in the water sector and holding back the implementation of cooperation projects in the water sector, such as the Red-Dead Canal or the rehabilitation of the lower Jordan River. The only solution to this deteriorating situation is to make water a tool for cooperation and an opportunity for strengthening Euro-Mediterranean integration as was envisaged in the SWM of the UfM.

V. Conclusion

Water is a strategic resource affecting the living conditions and political stability in the Mediterranean. In the MPCs, 180 million inhabitants do not receive the minimum water requirement of 1,700 cubic metres per capita per year – and 80 million experience a situation of serious shortage, with less than 500 cubic metres. Water is also important in terms of food security because most MPCs suffer from a strong agro-alimentary deficit. (Ferragina, E. and Quagliarotti, D., 2010). The 2008 Paris Summit that launched the UfM initiative was held during an important food crisis that in turn influenced political turmoil in the following years (Ferragina, E. and Quagliarotti, D., 2009). Furthermore, the existence in the area of many international river basins and of common underground basins where different countries compete in a zero-sum game, elevates the concrete risk of water conflicts aggravated by climatic change (Ferragina, E. and Quagliarotti, D., 2008).

All these aspects have contributed to making cooperation in the water sector one of the most important priorities within the framework of the UfM initiative. The responses of participants to the forthcoming Euromed Survey show the different positions among the MPCs and the
EU-27 concerning this matter. In terms of the level of priority for water cooperation within the framework of the EMP/UfM, the MPCs demonstrate a less optimistic assessment of the importance attributed to water issues inside the UfM in comparison with the EU-27. Moreover, regarding the water projects identified during the 3rd Ministerial Conference on Water held in Jordan in December 2008, the MPC respondents express a lower degree of acknowledgement of identified priorities in comparison with EU countries. Conversely, concerning the prospects for progress of the SWM, the MPCs have a less optimistic view compared to the EU-27 countries only in the field of the integration of policies, but express more positive values than the EU-27 in all the other cross-cutting objectives.

Summing up, we can see a less optimistic view of the MPCs concerning the assessment of the level of priority of water cooperation within the framework of the UfM, and a lower acceptance of the priorities identified, but an overall optimistic view regarding the prospect for progress in the various fields. These results can be interpreted as showing a certain disappointment regarding the relevance of water cooperation within the framework of the UfM, as well as less involvement of the MPCs in the determination of priorities for water projects – which is emblematic of the lack of co-ownership of the MPCs. On the whole, however, expectations for the process are positive. This means that it is now time to realise the potential of this new phase of the EMP – in accordance with shared principles of the SWM – and respond to the expectations of the MPCs in a sector that is strategic for their development.

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This essay seeks to examine the progress in energy cooperation in the Mediterranean Sea, particularly in the areas of electricity integration, renewable energy such as solar and winds, creating a unified regulatory framework, the growing volume of natural gas trade, and energy efficiency. A preliminary assessment of the political upheavals that have engulfed the Arab world since early 2011 and the role the European Union can play in responding to these new challenges will be discussed.

Introduction

At the 5th Euro-Mediterranean Energy Ministerial Conference in December 2007, European Energy Commissioner Andris Piebalgs launched a new Euro-Mediterranean Energy Partnership. This partnership endorsed the Ministerial Declaration and its 2008-2013 Priority Action Plan for Euro-Mediterranean cooperation in the field of energy. This plan seeks to achieve three goals:

- To pursue and amplify the implementation of energy market reforms and develop gradual harmonization of energy policies and regulatory frameworks between the Euro-Mediterranean Partner Countries towards the longer-term goal of creating a common energy market;
- To engage on more sustainable energy strategies, policies and systems by encouraging energy conservation and energy efficiency on both supply and demand sides, and by the substantial increase of renewable and other low carbon energy sources as well as closer attention to environmental protection, including maritime oil pollution; and
- To establish adequate frameworks for improving the investment climate, in particular to ensure the diversification of energy sources, reinforce gas and electricity interconnections, and support energy efficiency technology deployment and best practices.1

As the results of the Euromed Survey show, about one-third of the respondents agreed that there was improving harmonization and integration of markets and legislation and approximately half saw progress in promoting sustainable development in the energy sector and in developing initiatives of common interests in key areas, such as infrastructure extension, investment financing and research and development. Meanwhile, slightly fewer than half the participants stated that they were not aware of the progress in the implementation of the 2008-2013 Limassol Priority Action Plan (LPAP) on the Euro-Mediterranean Energy Partnership. Their common comment was: these programs associated with the LPAP are perfect, but it is difficult to assess without the full picture.

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I. General Overview of Euro-Mediterranean Energy Cooperation

The citizens of the 27 nations that constitute the European Union (EU) enjoy one of the highest standards of living in the world. Their economies, and indeed way of life, run on sustainable energy supplies. The EU, however, suffers from a severe shortage of indigenous energy deposits. This combination of high energy demand and limited production means that the EU is very dependent on foreign supplies. On the other side of the Mediterranean, North African oil and natural gas producers enjoy several geological and geopolitical advantages. First, unlike other producers such as the United States, Mexico, China, and the North Sea where production has already peaked or started declining, several North African reservoirs are largely untapped. Second, most of North Africa’s oil is high-quality, low-sulfur oil. This crude is highly prized by refiners in Europe (and elsewhere) because it yields far more lucrative refined products than oil from other regions. Third, the location of most oil fields is convenient for shipment to major consuming regions in Asia, Europe, and North America. This geographical proximity makes oil and gas shipments from North Africa to Southern Europe cheap and easy. Finally, compared to other producing regions, most North African producers offer attractive fiscal terms to international oil companies (IOCs). Most of the companies operate under favorable production-sharing contracts that allow even the most challenging fields in deep water to be developed at a good financial return. Despite growing competition from national oil companies (NOCs), foreign investment is generally welcomed in most North African countries in both upstream and downstream sectors. These characteristics (substantial reserves, high quality, easy transportation, and attractive investment environment) have laid the foundation for a partnership between major European companies and North African producers and cemented energy interdependence across the Mediterranean.

This interdependence is not limited to oil and natural gas supplies but includes green energy, renewable sources, a regulatory framework, and conservation. Thus, creating a more integrated Mediterranean energy market is of primary importance for coping with the fast growing energy demand in the Southern Mediterranean countries, while favoring low-carbon and renewable energy sources and energy efficiency. At the 5th Euro-Mediterranean Energy Ministerial Conference that took place in Limassol, Ministers and the Commissioner endorsed the Ministerial Declaration and its 2008-2013 Priority Action Plan for Euro-Mediterranean cooperation in the field of energy.

Within this context, the Euro-Mediterranean Energy Market Integration Project (MED-EMIP) was established to serve as a regional platform for energy policy dialogue and exchanges of experiences, secure energy supplies, diversified energy sources and to reduce the environmental impact of energy uses.
Since 2005, the Euro-Arab Mashreq Gas Market Project (EAMGM) has sought to improve regional integration of the energy market in general and of the gas market in particular in the partner countries (Egypt, Iraq, Jordan, Lebanon, Syria, and Turkey). The goal is to achieve legislative and regulatory harmonization amongst themselves and with the EU. The main activities of this project include assistance for preparatory legislative work and regulatory reforms, preparing economic and financial analysis for key investments, and undertaking advanced training on regulation, legislation and management issues.

**Graph 2: Evaluation of the regional cooperation projects: a) Electricity market integration**
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

**Graph 3: Evaluation of the regional cooperation projects: b) EAMGM II – Euro-Arab Mashreq Gas Market Project**
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

A similar platform is the Energy Efficiency in the Construction Sector in the Mediterranean (MED-ENEC). This regional project aims to increase the use of energy efficiency measures and renewable energy sources in buildings in Southern and Eastern Mediterranean countries. It also seeks to build capacity by organizing national and regional workshops and consulting events, while encouraging the creation of information, communication and cooperation networks.
In the last few years, efforts have been made in supporting the development of an integrated electricity market between Algeria, Morocco and Tunisia and between these three Maghreb countries and the EU, through the harmonization of their regulatory framework. The goal is to gradually integrate these electricity markets with that of the EU.

As discussed above, the EU-Mediterranean energy cooperation is not limited to fossil fuels. Indeed, in recent years cooperation on utilizing renewable sources (i.e. solar and wind) has gained momentum. Although renewable energy investment in the Middle East and North Africa had increased from $0.2 billion in 2004 to $2.5 billion in 2009, these investments account for less than 1% of the global total investment in 2009. These figures demonstrate the growing interest in renewable sources, but also indicate that much more efforts and resources need to be invested to fully utilize this untapped energy.

The share of renewable resources in the region’s energy mix is generally very low and varies from one country to another. In 2010, the share of solar and wind-based electricity generation stood at a minimum of 0% in Lebanon and a maximum of just below 1% for Egypt. The Southern and Eastern Mediterranean Countries (SEMC) – Morocco, Algeria, Tunisia, Libya,

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Egypt, Israel, the Palestinian Territories, Jordan, Syria, and Lebanon – enjoy tremendous potential to develop abundant solar power. The EU launched the Mediterranean Solar Plan (MSP) as one of the priority projects of the Union for the Mediterranean at the Paris Summit in July 2008.

Graph 6: Evaluation of the relevance of the project “Paving the Way for the Mediterranean Solar Plan” adopted by the European Commission
(average on a scale of 0–10, where 0 stands for very low relevance, and 10 for very high relevance)

The MSP aims at developing a large amount of solar and wind generation in the SEMC to supply the increasing demand in these countries and to also export power to Europe through new high capacity electricity corridors. Specifically, the MSP aims at two complementary targets: (a) developing 20 gigawatts of installed renewable energy capacity in the Mediterranean region by 2020 along with the necessary electricity transmission capacity and cross-border interconnections and (b) promoting energy efficiency policies in the region, thus addressing both supply and demand.4

A year later, twelve European companies launched the DESERTEC Industrial Initiative. Under the proposal, concentrating solar power systems and wind parks would be located on 6,500 square miles (17,000 square kilometers) in the Sahara Desert. Produced electricity would be transmitted to European and African countries by a super grid of high-voltage direct current cables. It would provide continental Europe with 15% of its electricity. By 2050, investments in solar plants and transmission lines would total €400 billion.5

This variety of energy policies and initiatives needs a unified regulatory system. Responding to this need, in May 2006 the EU established the Mediterranean Regulators for Electricity and Natural Gas (MEDREG). In its 4th General Assembly held in Rome (November 2007), MEDREG became a permanent association with a permanent secretariat in Milan, Italy.6 The main objective of MEDREG is to create the conditions for the development of an integrated energy market throughout the Mediterranean basin by encouraging the harmonization of the legal, technical and economic frameworks. This objective is directly linked to the setting up of a clear, stable and transparent regulatory context at regional level to encourage investment and guarantee a high level of consumer and environmental protection.7 The project focuses on the creation of a network for information exchange and assistance between EU and Mediterranean Partner Countries’ regulators. Nonetheless, these intense and growing cooperative relations between the EU and the

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Mediterranean neighbors were interrupted with the wave of political and economic unrest that has shaken the Arab world since early 2011.

II. The “Arab Spring” Impact on Euro-Mediterranean Energy Cooperation and the EU’s Energy Security

Since early 2011, political upheaval has swept several Arab countries including Tunisia, Libya, Egypt, Syria, Bahrain and Yemen, among others. Most of the uprisings were driven mainly by domestic policy grievances such as the high rate of unemployment and corruption. However, it is hard to separate foreign policy from domestic. Furthermore, the extensive decades-long (even centuries-long) ties between several EU Member States and the peoples and governments in the Arab world mean that Brussels was compelled to articulate a strategy and respond to these ground-shaking developments in its backyard.

The uprisings in the Arab world have presented Europe with both uncertainties and opportunities. Europe, like the rest of the world, was taken by surprise and did not fully comprehend the depth of anger and frustration in the Arab streets. Like other global powers, the EU is trying to articulate a cohesive strategy, but more likely Brussels is responding to the Arab Spring case by case. In other words, Libya is not Egypt, and Syria differs from Yemen. Each country is unique and requires a specific response. Still, several ideological and strategic forces are likely to shape the European response to the Arab uprisings. These include the European democratic ideals, concerns over the flow of immigrants and refugees, and economic interests.

In the short run the political upheavals are likely to raise domestic security concerns, weaken economic growth and contribute to overall socio-economic and political instability. In the long run, the replacement of the authoritarian regimes that stayed in power for decades by more transparent and democratic leaders is likely to be more accommodative to the peoples’ aspirations and demands. The EU has an opportunity to associate the new regimes in Tunisia, Egypt and probably other Arab states to the European ideals of democratic governments and free-market economies. This means supporting democratic reforms, pursuing market liberalization, and providing badly-needed financial and technical assistance.

The participants at the European Council meeting of March 2011 agreed to develop a new partnership with the Southern members of the European Neighbourhood Policy (ENP). The new partnership is based on deeper economic integration and closer political cooperation. Immediate priorities include stepping up humanitarian aid, increasing support from the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD), and enhancing trade and foreign investments. The EU also plans to develop a stronger dialogue and partnership with civil society organisations in the Mediterranean region. Responding to political upheaval in North Africa, on 8th March Commission President José Manuel Barroso and High Representative Catherine Ashton jointly proposed a new policy framework entitled “A Partnership for Democracy and Shared Prosperity with the Southern Mediterranean.” 8 The proposal’s central thrust is the need for the EU to exercise conditionality properly in the future. Specifically, European aid, trade and investment should be made available to North African states on the basis of real progress on democracy and human rights.

One of the main objectives of this essay is to provide insight on the potential impact of the “Arab Spring” on the EU’s energy security and the broad energy cooperation between the EU Member States and the Mediterranean partners. Is there a threat to oil and natural gas supplies from North African producers? Will the projects outlined in the above section be frozen? Will European oil companies investing in Algeria, Libya and Egypt face restrictions on their

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operations? Will the political and economic upheavals further destabilize oil and gas prices and endanger fragile global and European economic recovery?

These are some of the main questions that need to be addressed. It is important to point out that any attempt to predict the directions and impacts of the Arab Spring is speculative and is likely to be shaped by several known and unknown forces. These include the success or failure of Arab uprisings not only in toppling autocratic regimes, but also restoring public order and gaining legitimacy. Europe’s historical ties and geographical proximity suggest that the European response (i.e. military action, economic assistance, or any other means) will play an important role in shaping the outcome of the uprisings. Despite these uncertainties, it is highly likely that the emerging Middle East/North Africa will be driven by nationalist/Islamic sentiments and will face tremendous economic and financial challenges. These two characteristics should not be seen as a threat but they will impact Europe’s energy security and how the EU should respond to the uprisings sweeping the Arab world.

The potential impacts of political upheavals on energy markets arouse concerns in both civil society and policy-makers. Namely in relation with fluctuation of international oil prices and domestic security, which not only concerns supplies and prices but also the maintenance of market dominance for the EU energy companies.

First, it is probably too simplistic to say that the upheavals in the Arab world are the main force behind high oil prices. Other factors are equally important, including global economic recovery, level of consumption, energy conservation, the impact of the Fukushima nuclear disaster on Japan’s energy strategy, and whether OPEC will increase production. That said, instability in the Middle East/North Africa has added more uncertainty to global energy markets. For example, Libya’s volume of oil production and export has been considerably reduced and there is no way to know when or if it will reach the pre-uprising level.

Second, oil and gas revenues supply a substantial proportion of North African economies. In other words, Algeria, Libya and Egypt depend heavily on exporting a large share of their hydrocarbon production. Given geographical proximity and low costs, most of these exports go to Europe either by tankers or pipelines. The post-uprising regimes are not likely to block these very profitable commercial ties. They will need these revenues to provide for their citizens. Assuming a higher level of transparency and accountability, the new regimes in the Arab world are likely to demand a higher price (what they perceive as a fairer price than they obtained under the old regimes) for their energy resources. In other words, Europe does not need to worry about disruption of supplies, but is likely to pay a higher price.

Third, British, French, Italian, Spanish and other European oil companies have made significant investments in the energy sector in North African countries. They have partnered with the national oil companies such as Sonatrach in Algeria, the National Oil Corporation in Libya, and the Egyptian General Petroleum Corporation and Egyptian Natural Gas Holding Company in Egypt. In the case of the pro-democracy movements that have already toppled the regimes or are working to achieve this goal, a strategy on foreign investment and the role of the state in the economic system in general and the energy sector in particular is pending. However, the lack of indigenous expertise, the necessary capital, and the dire need to explore and develop their hydrocarbon deposits suggest that reliance on European oil companies (and other international companies) will continue.

Given geographical proximity and century-long historical ties, the EU is well-positioned to assist its Mediterranean neighbors in shaping their new future. The close cooperation between governments and private enterprises on the opposite sides of the Mediterranean in exploring and developing all forms of energy is likely to survive the 2011 uprisings. Developing and utilizing all energy resources (i.e. oil, natural gas, solar) would benefit all parties. It is a win-win situation.
ENVIRONMENTAL COOPERATION IN THE MEDITERRANEAN: THE LONG DISTANCE FROM WORDS TO DEEDS

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Introduction

There is no shortage of institutions and grand commitments to promote environmental cooperation in the Mediterranean. In 1975, sixteen riparian countries agreed under the aegis of the United Nations Environment Programme (UNEP) on a Mediterranean Action Plan (MAP) that was later followed by the adoption of the Barcelona Convention for the Protection of the Mediterranean Sea Against Pollution, and a number of protocols on dumping from ships and aircraft, emergencies, land-based sources of pollution (LBS), specially protected areas, offshore activities, movement of hazardous wastes and integrated coastal zone management (Haas, P.M., 1989). Under this same umbrella, and as a response to the momentum that the 1992 Rio Conference gave to environmental policies, a Mediterranean Commission on Sustainable Development was established in 1995 that ten years later produced a toothless Mediterranean Strategy on Sustainable Development.

In 1995, the launching of the Barcelona Process put environmental policies on the agenda of Euro-Mediterranean relations. Thus, on the bilateral track the Association Agreements with Mediterranean partners contain a (vague) article on environmental cooperation, and on the regional track a programme was set up to deal with “short and medium-term priorities” (SMAP). In 2005 the latter programme was substituted by a more ambitious target. With the aim of providing momentum for the environment in the EMP, and under the idea that the Barcelona Process had to deliver more visible results, the 2005 Summit agreed on the objective of de-polluting the Mediterranean Sea by 2020 (the so-called Horizon 2020 process).1 Besides, the European Neighbourhood Policy (ENP) has its own environmental provisions too. Finally, the more recent Union for the Mediterranean (UfM) has added yet another layer of overarching commitments which, given the overcrowding of frameworks, focus on the enhancement of the H2020 process.

In short, states and EU institutions have been eager to talk about the protection of the Mediterranean Sea in every available forum. This resonates with the perception captured by the Survey that de-polluting the Mediterranean is an important objective for the Euro-Mediterranean region. It also resonates with the (ever more) wide-spread idea that “environmental deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States”. According to the survey, the probability attributed to such a hypothesis by experts and practitioners has grown from 5.83 to 6.55 in a year (where 0 stands for no probability, and 10 for a very high probability). Nevertheless, words and deeds are separated by a long distance: all the aforementioned schemes suffer from serious implementation problems.

I. Below the Radar

Although they make a rather dense web of institutions and norms, and show that Mediterranean countries and the EU have long pledged to jointly tackle environmental problems, cooperation schemes on this matter are little known and poorly understood. They usually remain below the radar, particularly within the general framework of Euro-Mediterranean relations. The environment is not a central component of the neighbourhood of Euro-Mediterranean policies. The Survey shows that only 28.6% of the surveyed experts claim knowledge or a clear perception of the environmental dimension of Euro-Mediterranean cooperation (and the percentage is particularly low among EU Member States). This is ironic: back in 2005, when the idea of de-polluting the Mediterranean by 2020 was first floated by the Commission, the focus was on announcing a “highly visible and ambitious initiative.” It seems that the H2020 process has not even managed to become visible for the community of experts and practitioners involved in Euro-Mediterranean relations.

Graph 2: Knowledge or a clear perception of the sectoral cooperation in the Mediterranean (%)
be pursued in each of these categories. More to the point, the use of conditionality to promote the effective adoption and implementation of norms and rules is possible only in central issues. And, of course, Mediterranean Partner Countries can be considered Mediterranean star pupils (and receive the benefits associated with it) even when they are not proactive in environmental issues, and they can be branded as laggards even when they are outstanding in the area. In other words, the EU cannot be expected to be tough in the administration of carrots and sticks, in order to promote the effective implementation of environmental policies.

Therefore, the EU has had to resort to other strategies, which can be called functional cooperation and international legitimisation (Buzogány, A. and Costa, O., 2009). Under the strategy of functional cooperation, ties are established between sectoral bureaucracies from the EU and neighbouring countries, in order to exchange resources, know-how and policy approaches, in a way similar to that described in Anne-Marie Slaughter’s work on transgovernmental networks (Slaughter, A.M., 2004: 124-9). Actors dealing with the environmental dimension of Euro-Mediterranean cooperation have established alliances among themselves by exchanging financial, technical and political resources, thus reinforcing their positions in neighbourhood policies. Several tactics are used under this strategy: (i) the use of combined influence to anchor the interests of these actors in EU reference documents and financial provisions; (ii) the transfer of technical know-how to partner country efforts to influence their policy paradigms, which frequently takes place through twinning projects; and (iii) the setting up of ad hoc, EU-led regional processes and institutionalised networks that provide the Euro-Mediterranean environmental policies with more autonomy.

The second available strategy is international legitimisation. When an international regime or, more generally, an international rule exists in an issue area, the EU can foster cooperation by way of international legitimisation (Costa, O., 2010). Here, the EU reinforces its case in favour of the adoption of environmental policies by partner countries by appealing to multilateral environmental agreements, starting with the MAP system (Keck, M. and Sikkink, K., 1998: 396). Rules issued by regional or international institutions help legitimate the policy aims of actors in neighbouring countries, thus empowering their standing when bargaining with their domestic constituencies. Additionally, international institutions provide financial means and capacity-building measures to foster environmental cooperation. In sum, they encourage the adoption and implementation of environmental rules by neighbouring countries. On these occasions, the EU often acts as a transmission belt of international or regional norms (Barbé, E. et al, 2009).

Nevertheless, the two strategies have clear limits. Most importantly, their effects do not go beyond the boundaries of narrow circles of key officers in partner countries, and seldom reach the key decision-makers that can make a difference when it comes to implementing more advanced environmental policies.

II. Knitting Different Schemes Together

The different cooperation schemes on the Mediterranean environment have developed distinct capacities. While the Mediterranean Action Plan, the Barcelona Convention and the associated protocols operate with technically fine-tuned and legally-binding instruments, as well as a certain capacity to create mutual trust among key actors (Conrads, A. et.al., 2002: 32) and a “collective awareness” of the importance of protecting the Mediterranean Sea (Skjaerseth, J.B. 1996: 48; Massoudet, M. et al., 2003: 893), Euro-Mediterranean policies have the potential to exercise greater economic and political leverage. This has resulted in the emergence of a certain division of labour among them: on the one hand, the environmental dimension of the Barcelona Process sets the objectives and should provide political and economic resources; on the other hand, the MAP system provides the expertise and the necessary institutional and legal framework. Consequently, and in order to overcome their complementary weaknesses, these schemes have been knitted together.
The system built on the 1975 Mediterranean Action Plan was a rather successful regime until the beginning of the 1990s (Haas, R., 1989). However, it has been losing momentum since then. The new protocols and the amendments to old ones (normally with more teeth) have experienced difficulties in gathering enough ratifications to come into force (Belfiore, S., 1996: 247; Conrads, A. et al., 2002: 31; Frantzi, S., 2008; Kütting, G., 2000). Therefore, links have been established between the Land-Based Sources (LBS) Protocol and the H2020. Given that the H2020 processes focus, precisely, on pollution coming from land-based sources, the decision has been taken to use its resources to finance projects identified under the National Action Programmes developed under the Strategic Action Programme of the LBS Protocol.

Nevertheless, an important weak point of the H2020 is that it is not really backed by a credible budget. Only €33m were earmarked in the Regional Indicative Programme 2007-2010, which equals 9% of the regional funds for the Mediterranean under the European Neighbourhood Policy Instrument. This is a rather small amount of money (and the 2011-2013 documents provide no specific figure). However, according to the design outlined by the Commission, some more resources might arrive from other international donors. More particularly, the European Investment Bank and a partnership between the Mediterranean Action Plan and the World Bank are expected to contribute to the effort. Moreover, the Union for the Mediterranean has been expected to provide some additional momentum to the H2020, both in political and economic terms, if it finally gets its act together.

There are two arguments to be made in this regard. First, inter-linkages are strong enough to render any contrast between the UNEP-led MAP and Euro-Mediterranean environmental policies practically impossible for those familiar with the workings of both schemes. Second, the knitting of schemes together is, yet again, a low-key approach to reinforcing environmental cooperation, in that it has little impact on the decision-making processes in both neighbouring and EU Member States.

### III. Little Effectiveness

The reports issued by the Plan Bleu and the European Environment Agency have consistently pointed to the fact that the Mediterranean environment is not only not experiencing any general improvement, but even some drawbacks. The Mediterranean Sea continues to be threatened by major problems. From 600 or so cities with more than 10,000 inhabitants, only 69% operate a wastewater treatment plant, often in inadequate shape. Solid waste is frequently disposed of in dumping sites with minimal or no sanitary treatment (see Table D.9.1. on the perception of progress – or the lack thereof – on some of these issue areas).

**Graph 6: Environmental cooperation: Assessing the progress in the sectors identified in the Horizon 2020 strategy**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Progress</th>
<th>No progress</th>
<th>Regression</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal waste</td>
<td>41%</td>
<td>54%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Urban waste water</td>
<td>48%</td>
<td>45%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Industrial emissions</td>
<td>35%</td>
<td>55%</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey


Approximately 200,000 vessels of more than 100 tonnes each cross the Mediterranean annually, and they discharge 250,000 tonnes of oil due to shipping operations. On top of that, discharges caused by incidents at oil terminals or routine procedures from land-based installations are estimated at 120,000 tonnes every year.

Bioinvasions are also a problem, with approximately 15 new species reported each year. Moreover, the overexploitation of marine resources has led to a significant loss of the predators at the top level of the marine food web. Naturally, there are a number of reasons that account for this situation. In particular, certain demographic and economic trends are increasingly putting Mediterranean ecosystems under pressure. In addition, one of the few truisms in political science is that there is a remarkable distance between the outputs of a policy and its final impacts. However, the most important problem here is that the rhetoric about protecting the Mediterranean environment is not supported by actual decisions or any degree of environmental integration in the priority sectors of Euro-Mediterranean relations. The Survey shows that the perception of progress regarding de-pollution is amongst the second lowest, only 29% of respondents, while the perception of lack of progress is the second highest, in a list that includes a total of 14 sectoral issues.

Graph 7: Assessment of the progress achieved of the plans and projects of cooperation

<table>
<thead>
<tr>
<th>Euromed Action Plans and sectoral strategies</th>
<th>Don’t know %</th>
<th>Progress</th>
<th>No progress</th>
<th>No regression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Framework of Actions (adopted in November 2008)</td>
<td>39%</td>
<td>33%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Mediterranean Water Strategy (still to be approved after the Ministerial Meeting in April 2010)</td>
<td>33%</td>
<td>35%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Mediterranean Maritime Strategy (announced in the Marseilles Declaration 2008)</td>
<td>44%</td>
<td>49%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Euro-Mediterranean Industrial Cooperation 2008-2010 Working Programme (adopted in October 2008)</td>
<td>45%</td>
<td>48%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Working Programme on Tourism (announced in April 2008)</td>
<td>45%</td>
<td>48%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Regional Transport Action Plan for the Mediterranean (adopted in May 2007)</td>
<td>44%</td>
<td>49%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Istanbul Action Plan on Strengthening the Role of Women in Society (adopted in November 2006)</td>
<td>45%</td>
<td>48%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>2008-2013 Priority Action Plan on Energy (adopted in December 2007)</td>
<td>45%</td>
<td>49%</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UfM projects</th>
<th>Don’t know %</th>
<th>Progress</th>
<th>No progress</th>
<th>Regression</th>
</tr>
</thead>
<tbody>
<tr>
<td>De-pollution of the Mediterranean Sea</td>
<td>32%</td>
<td>64%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Maritime and land highways</td>
<td>39%</td>
<td>35%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Civil protection initiatives to combat natural and man-made disasters</td>
<td>37%</td>
<td>32%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Mediterranean Business Development Initiative focusing on micro, small- and medium-sized enterprises</td>
<td>33%</td>
<td>35%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Higher education and research, Euro-Mediterranean University in Slovenia and Fes</td>
<td>37%</td>
<td>35%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Alternative energies: Mediterranean Solar Plan</td>
<td>28%</td>
<td>38%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey
IV. Conclusion

There are many overarching commitments, and there is not much more. Commitments are toothless, budgets small and there is a general lack of political will. To be fair, there is something else: small circles of practitioners trying to build up some momentum for environmental protection in the Mediterranean. The typical way in which they are doing so is by promoting functional cooperation and looking for legitimacy in international norms, as well as knitting together the different schemes so as to create synergies between them. Nevertheless, the big picture stays the same: no steady improvement of the environment has been identified, nor has it been perceived by experts and practitioners, as shown by the Survey. If anything, the nearly four-decade long history of environmental cooperation in the Mediterranean shows that there is a limit to the positive outcomes of grand commitments and no policies.

V. References


THE UFM: A UNION OF PROJECTS... BUT WHICH PROJECTS?

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The first Union for the Mediterranean (UFM) Summit (13th July 2008) was a media success for France. Nicolas Sarkozy’s project, announced in February 2007, had just been inaugurated with the support of its 43 participants. The initial idea of a Mediterranean Union did, however, have to undergo a great number of alterations before being rechristened “The Barcelona Process-Union for the Mediterranean”. At the Conference of Foreign Affairs Ministers (Marseilles 2008), the reference to Barcelona disappeared.

As of late 2008, two Euro-Mediterranean policies have coexisted. On the one hand, is the European Neighbourhood Policy (ENP), based on the 27+1 equation, with a country action plan and indicative programme relationship and involving only some multilateralism (transregional and cross-border cooperation). On the other hand, there is the UFM, based on intergovernmentalism (which implies a process of de-communitarisation), based on co-ownership and equality and concerning the concerted management of public goods (the environment, water, energy), specific structuring, visible and regional projects (civil protection, land and sea motorways) or shared ambitions (universities and research).

These projects can be carried out on a voluntary basis within the framework of strengthened sub-regional cooperation (the notion of variable geometry). Though it is not the aim of this article to highlight the institutional and financial difficulties that have prevented the UFM from taking wing to date, they have nonetheless played a significant role. Co-ownership injects, in principle, a dose of politicization in a project that is, after all, primarily economy-oriented, whereas the financial crisis prevailing in Europe reduces flexibility by reducing the resources required for the projects. Moreover, the resignation of the first Secretary General, Ambassador Massa’deh, and the eviction of Mubarak, Co-Chairman of the UFM, have left both the position of Secretary General of the UFM and the Co-Presidency vacant.1

I. Policy Issues relating to Euro-Mediterranean Architecture

I would like to discuss three other issues that seem crucial to the entire Euro-Mediterranean architecture.

1.1. How Should We Appraise the Barcelona Process?
The first issue relates to the following aspects of the Barcelona Process: the Barcelona Declaration, the MEDA Regulation, Euro-Mediterranean institutions, the civil society fabric, etc. We know that the Euro-Mediterranean Partnership has had mixed results: its Social and Cultural Basket suffered the after-effects of the 11 September 2001 attacks and the invasion of Iraq (2003), namely rampant Islamophobia in Europe. Its Political and Security Basket was contaminated by the derailment of the peace process, whereas its Economic Component, despite some improvements, suffered from deep inconsistency, given that the Euromed proved, in fact, to be a counter-model of successful, thorough regionalization. Indeed, the

1. This article was written before the appointment of Youssef Amrani as Secretary General of the UFM in May 2011.
verticality of South-North relations did not decrease, intra-zone trade remained insignificant, inter-industry trade was reduced to a trickle, foreign investment turned away from the area (except towards the end of the period) and, since 2008, the effects of the European economic crisis are being transferred to Southern partners. In short, the Euro-Mediterranean area has remained superficial, commercial and non-productive.

But despite all of the shortcomings, errors, and limitations of the Barcelona Process, 15 years of ministerial conferences, contact among members of the civil society fabric, conferences and seminars, and activities by networks such as the Forum of Euro-Mediterranean Economic Institutes (FEMISE) and the Euro-Mediterranean Study Commission (EuroMeSCo) could not but allow the emergence of what should be called the Barcelona acquis.

Moreover, the European Neighbourhood Policy (ENP), launched in 2004, partially includes it in its action plans. But what about the UfM? Can the UfM manage the diplomatic dimension of relations between Northern and Southern partners? Does it facilitate the involvement of civil society and allow the establishment of networks of women, researchers, journalists, artists, etc.? Does the UfM strengthen cultural and social dialogue? Does it allow political issues to be addressed and will it provide the opportunity to forge a Euro-Mediterranean Community of Democratic States? Nothing could be less certain.

1.2. The Southern Shore of the Mediterranean: A Community of Values and Interests

The second issue concerns UfM projects. There is a sense that all projects are based on a convergence of interests. But what about the convergence of values? The issue of “shared values” has been kept under wraps. But the Arab revolutions emerged, reminding European diplomacy, too obsessed with order and stability, that the notion of “shared values” really means something to Arab people, as opposed to empty slogans.

Moreover, the UfM implicitly recognizes the complementarity of natural resource endowments (energy, in particular the Mediterranean Solar Plan), but what about other complementarities, such as demographic complementarity (mobility), or educational (university, research), agricultural (food), or even political (Community of Democratic States) complementarities. Due to its multi-dimensional, holistic nature, the Barcelona Process pinned together these complementarities, even if it failed to implement them. Because of its bilateral, conservative nature, the ENP is not the appropriate policy for strengthening these complementarities. Due to its à la carte, multilateral philosophy, the UfM suffers the same shortcoming.

1.3. What Lessons Can Be Drawn from the Uprisings?

This brings us to the third issue. The UfM cannot be locked into a functional, variable-geometry, sectoral approach. It should be based on a community of interests and values, combining the principles of efficiency, profitability and utility with those of solidarity, mobility and citizenship. The young Arab revolutionaries are sending us clear messages: they want to become real citizens of responsible states, and they are asking for the EU’s solidarity. Translated into simple notions: young Arabs want freedom, democracy and a job that fits their qualifications, or in its absence, they wish to have access to the fourth freedom, that of circulation.

That is why the UfM’s first real line of action should be the development of small- and medium-sized enterprises (SMEs) that create quality jobs for the millions of young graduates of the area. Of course, this is not within the category of major structural projects, but can such projects do without SMEs?

This emphasis on small- and medium-sized enterprises is not intended to diminish the importance of strategic projects such as the Solar Plan or a land motorway from Casablanca to Gaza, or a possible high-speed railway line (Rabat-Alexandria). It stresses the importance of creating employment for the millions of graduates in the area, a large percentage of whom are now idle. It highlights the important role of cities, regions and local authorities, who must be involved
in the construction of a Mediterranean of shared prosperity. And, finally, it stresses that the transformation of the millions of young unemployed Mediterranean workers into productive agents and active consumers could give new impetus to European growth, now at half mast. Apart from the transfer of know-how and show-how that the release of business energy involves, it is a “new structuring of the North-South area” that is at stake, with a view to partnership for democracy and shared prosperity.

The EU has, in fact, established a series of instruments designed to stimulate innovation (Medibtikar – the Euromed Innovation and Technology Programme, with a budget of 7.24 million euros) and promote investment (FEMIP – Facility for Euro-Mediterranean Investment and Partnership – and Invest in Med, with budgets of 33 and 9 million euros, respectively). However, these initiatives should be better endowed with sufficient resources and other instruments should be created.

The second endeavour should be agricultural and rural development, the only thing capable of restoring agriculture in the South to the capacity of feeding the population and preventing the desertification of the countryside.

And, finally, the third line of action should be the management of human mobility in the Mediterranean. The countries of the North must understand that this is an essential issue in the countries of the South, where the obstacles to circulating in the direction of Europe are clear to be seen. How can we speak of a Union for the Mediterranean to populations who are not allowed to leave their countries? These populations need such mobility, without which regional integration shall remain fictional.

In addition to these work areas, there is also the educational line of action, which calls for multiplying school, university and laboratory partnerships. This would require facilitating student, researcher and professor mobility, granting fellowships, fostering double-degree programmes and creating specialised libraries.

Again, speaking of new lines of action does not mean outright rejection of the major projects assigned priority at the first UfM Summit in Paris. Indeed, who can doubt the usefulness of projects on renewable energy (including wind and solar), on the operation and management of water resources or on de-pollution, transport and civil protection? However, many of these projects could well be promoted by the private sector, with the UfM acting as a coordination and monitoring agent.

II. Conclusion

Young Mediterranean people today want companies that employ them, an agriculture that feeds them, quality education that prepares them for market requirements, an ecosystem that protects them and a hospitable Mediterranean to welcome them. I stress this latter point because, if there is a “structuring project” of Mediterranean identity to be built at all, it will certainly be one of negotiated, coordinated and realistic mobility. Between a deterrent, “fortress Europe”, and a “colander Europe”, there is a middle path (circular, temporary and contractual migration, targeted migration, etc). Europe is not Mother Teresa – we know this. But its borders have become deadly – this is borne out every day by the corpses washing up on beaches. The entire challenge of the UfM lies in this fact: that a common destiny is not based on charity, let alone on isolationism – it is first and foremost an act of will. For the time being, however, the lack of a shared political will appears to be the “best shared” thing on both shores of the Mediterranean.
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LIST OF RESPONDENTS

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ALEM MENOUAR, Mission of the Kingdom of Morocco to the EU, Morocco
SIMON MERCIECA, The Mediterranean Institute, Malta
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ABDELAZIZ MOKRANI, Université de boumerdès, Algeria
ALMUT MÖLLER, DGAP-German Council on Foreign Relations, Germany
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Khaldoon Mourad, MEDPOL, National Coordinator, Syria

Nikolaos Mouzoupolous, Strategic Management Associate, Greece

Seyfeddin Muaz, Royal Scientific Society (RSS), Jordan

Anke Muffelmann, Heinrich Boell Foundation, Germany

Muhammad Mursi Mursi, Misr University for Science and Technology, Egypt

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Nicola Negura, The Regional Association for Adult Education Suceava (AREAS), Romania

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Nassim Oulmane, Algeria

Abderraouf Ounaies, Faculté des Sciences Juridiques, Politiques et Sociales de Tunis, Tunisia

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Arthur Perici, Ilsa Local Council, Malta

Nicolas Peridy, Institut d’Economie et de Management de Nantes-IAE (IEMN-IAE), France

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Cristina Pia, Intesa Sanpaolo, Italy

Gail Pilgrim, LiteSide Festival, Netherlands

Christos Polyzogopoulos, OKE, Greece

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Rasa Reinhofle, Latvian National Youth Agency, Latvia

Uwe Reissig, Goethe-Institut, Germany

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List of Respondents

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MICHAEL RYAN, Head of the Political Section of the Delegation of the European Commission to Egypt, Egypt
GÜLER SABANI, Turkey
GALIA SABAR, Hotline for Migrant Laborers, Israel
KARAM SABER, Lands Center for Human Rights, Egypt
HALEEMA SAEED, Central Bureau of Statistics, Ramallah, Occupied Palestinian Territory
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NECDET SAGLAM, Association of Civil Society and Development Institute, Turkey
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MAXIME SANSO, Egypt
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SIRIN TEKELI, Turkey
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ANDREAS THEOPHANOUS, Cyprus Center for European and International Affairs (CCEIA-UNIC), Cyprus
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Kostadinka Todorova, International Association Initiatives for Cooperation, Bulgaria
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Leslie Tramontini, Philippus-Universität, Marburg, Germany
Despoina Triakosari, Greek Association of Women Entrepreneurs (SEGE), Greece
Dimitrios Triantaphyllou, Kadir Has University, Greece
Nada Trunk, EMUNI, Slovenia
Erdem Turkekul, Turkekul Law Office, Turkey
Miralem Tursovic, Youth Resource Centre (ORC), Tuzla, Bosnia and Herzegovina
Agusti Uled, ESADE, Spain
Fatma Unsal, Baskent Kadın Platformu Capital City Women’s Platform, Turkey
Hana Uraidi, Jordan Enterprise Development Corporation, Jordan
Philippe Vallois, Plan Bleu, France
Robert Vandenbégine, European Institute for Research on Mediterranean and Euro-Arab Cooperation, Belgium
Jordi Vaqueur, CIDOB, Spain
Consuelo Varela-Ortega, Universidad Politécnica de Madrid (UPM), Spain
Evangelia Varella, Aristotle University of Thessaloniki, Greece
Sotiris Varouchakis, Ambassador, Coordinator of the Barcelona Process, Ministry of Foreign Affairs, Athens, Greece
Michal Vasecka, Center for the Research of Ethnicity and Culture, Slovakia
Risto Veltheim, Ministry for Foreign Affairs of Finland, Finland
Gerarda Ventura, Meridie Associazione Culturale, Italy
Giedre Verbickiene, Lithuanian Youth Centre (LYC), Lithuania
Kristina Vangieva, Economic and Social Council, Bulgaria
Roberto Vigotti, OME, France
Jean-Louis Ville, Chef d’unité A3- Operations centralisées pour la Méditerranée, l’Europe, le Moyen Orient et la Politique de Voisinage, International
Emina Visnic, Zagreb Center for Independent Culture and Youth, Croatia
Sten Walegren, The gate, Sweden
Isabelle Werenfels, Stiftung Wissenschaft und Politik (SWP), Germany
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Stefan Winkler, Goethe-Institut, Germany
Dimitris Xenakis, University of Crete, Dept. of Political Science, Greece
Orna Yarmut, CoPro-Documentary Marketing Foundation, Israel
Manal Yassine, Ministry of Industry, Lebanon
Netice Yildiz, Faculty of Architecture, Eastern Mediterranean University, Cyprus
Esmery Yogan, Ercen University of Cag Yenice-Mersin, Turkey
Sharon Zablovsky, Israel Film Fund, Israel
Michael Zaide, Israel Water Authority, Israel
Justyna Zając, University of Warsaw, Institute of International Relations, Poland
José Miguel Zaldo, Comité Hispanomarroqui de la Confederación Española de Organizaciones Empresariales, Spain
Mohamed Zarif, Cairo Opera House, Egypt
Mourad Zarrouk, Morocco
Ahmed Jiddou Zeine, Anadelp, Mauritania
Milenax Zeithamllov, Czech Arab Society, Czech Republic
Aissa Zelmati, Ministère de Commerce, Algeria
Malika Zemmouri, Institut d’architecture d’Algérie, Algeria
Saleem Zena, Algerian journalist and writer in Tamazight language. Hosted in Barcelona by Catalan PEN, ‘Refuge Writer’ Programme, Algeria
Magda Zenon, Hands Across the Divide, Cyprus
Ognian Zlatev, Media Development Center, Bulgaria
Mohamed Zoghlami, France
Georges Zouain, Gaia Heritage, Lebanon
In order to facilitate the data processing, and to improve the statistical analysis, we would be very pleased if you could provide us with the following information:

### A.1. Gender

- [ ] Man
- [ ] Woman

### A.2. Nationality

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<td>United Kingdom</td>
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<td>44</td>
<td>Other</td>
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</table>

### A.3. Position

[ ]

### A.4. Institution

[ ]

### A.5. Kind of institution

- [ ] 01. Governmental
- [ ] 02. Diplomatic
- [ ] 03. EU institution
- [ ] 04. Other international organisation
- [ ] 05. Think tank
- [ ] 06. Academic
- [ ] 07. Media
- [ ] 08. NGO
- [ ] 09. Trade Union
- [ ] 10. Company (Business Sector)

### A.6. What is your main area of specialisation (you can indicate one or two):

- [ ] 01. Political Cooperation and Security
- [ ] 02. Economic and Financial Cooperation
- [ ] 03. Social, Cultural and Human Exchanges
- [ ] 04. Migration and Justice Affairs
BLOCK B

**B.1. General Assessment:** What is your global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean in the July 2008 September 2010 period?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
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<td>8</td>
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<tr>
<td>9</td>
<td>10</td>
<td>11</td>
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</tbody>
</table>

Do you have some comments?

**B.2. Assessment of EU Presidencies and EU and MPC Co-Presidencies:** How would you grade the action of the different EU Presidencies and Co-Presidencies of the Union for the Mediterranean (UfM)?

<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
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<td>9</td>
<td>10</td>
<td>11</td>
</tr>
</tbody>
</table>

A. French EU Presidency (July-December 2008)
B. Czech EU Presidency (January-June 2009)
C. Swedish EU Presidency (July-December 2009)
D. Spanish EU Presidency (January-June 2010)
E. Egyptian Co-Presidency of the UfM (July 2008-July 2010)
F. French Co-Presidency of the UfM (July 2008-July 2010)

Do you have some comments?

**B.3. Secretariat of the Union for the Mediterranean:** How would you assess progress made regarding the setting up of the UfM Secretariat between November 2008 and September 2010?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
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</tr>
<tr>
<td>3</td>
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<tr>
<td>9</td>
<td>10</td>
<td>11</td>
</tr>
</tbody>
</table>

**B.4. Do you expect the Secretariat to play a key, moderate or negligible role in the new Euro-Mediterranean institutional architecture in the near future?**

<table>
<thead>
<tr>
<th>Negligible role</th>
<th>Key role</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
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<td>8</td>
</tr>
<tr>
<td>9</td>
<td>10</td>
<td>11</td>
</tr>
</tbody>
</table>

Do you have some comments?
### B.5. Summits of the Union for the Mediterranean:

How do you assess the importance of the Summits of Heads of State or Government for the advancement of the Union for the Mediterranean?

<table>
<thead>
<tr>
<th>No importance</th>
<th>Very high importance</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?

### B.6. How do you assess the progress achieved in the implementation of the following Euro-Mediterranean sectoral strategies and action plans? How do you evaluate their potential contribution to the achievements in the overall Euro-Mediterranean objectives?

<table>
<thead>
<tr>
<th>Progress achieved</th>
<th>Importance for Euromed Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress</td>
<td>No progress</td>
</tr>
<tr>
<td>1 2 3 9</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
</tr>
</tbody>
</table>

- D. Working Programme on Tourism (announced in April 2008)
- F. Mediterranean Maritime Strategy (announced in the Marseilles Declaration 2008)
- H. Mediterranean Water Strategy (still to be approved after the Ministerial Meeting in April 2010)

Do you have some comments?
### B.7. UfM Projects:

How do you assess the progress achieved regarding the six projects selected so far in the framework of the UfM? How do you evaluate their potential contribution to the achievements of the overall Euro-Mediterranean objectives?

<table>
<thead>
<tr>
<th>Progress achieved</th>
<th>Importance for Euromed Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress</td>
<td>No progress</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

A. De-pollution of the Mediterranean Sea
B. Maritime and land highways
C. Civil protection initiatives to combat natural and manmade disasters
D. Alternative energies: Mediterranean Solar Plan
E. Higher education and research, Euro-Mediterranean University in Slovenia and Fez
F. Mediterranean Business Development Initiative focusing on micro, small- and medium-sized enterprises

### B.8. UfM Projects:

Among the many other new projects proposed for the UfM, please assess them by their importance?

<table>
<thead>
<tr>
<th>No importance</th>
<th>Very high importance</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

A. Euro-Mediterranean Arbitration Court
B. Mediterranean Investment Guarantee Convention
C. Project on Female Entrepreneurship and Strengthening Women’s Participation in Public Life in the Mediterranean
D. Mediterranean Junior Erasmus Programme
E. Cultural TV Channel for the Mediterranean
F. Mediterranean Youth Office facilitating mobility of Mediterranean students
G. Mediterranean Cancer Plan
H. Mediterranean Agency for Urban Development
I. Mediterranean Women’s Foundation

Please mention other priority projects in your view:
### B.9. Eastern Partnership:
In your opinion, how will the Eastern Partnership launched in March 2009 between the EU and six Eastern European States (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine) affect the development of Euro-Mediterranean relations?

<table>
<thead>
<tr>
<th>Very negative impact</th>
<th>Very positive impact</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Do you have some comments?

### B.10. European External Action Service:
In your opinion, how will the future European External Action Service affect the Euro-Mediterranean relations?

<table>
<thead>
<tr>
<th>Very negative impact</th>
<th>Very positive impact</th>
<th>Don’t know</th>
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</thead>
<tbody>
<tr>
<td>0</td>
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</tbody>
</table>

Do you have some comments?

### B.11. EU Financial Perspectives 2014-2020:
Within the framework of the new EU Financial Perspectives 2014-2020 to be negotiated in 2011, how would you assess the need for a review of the current financial instruments and modalities (regardless of the amount allocated) for Euro-Mediterranean cooperation (European Neighbourhood and Partnership Instrument and FEMIP)?

<table>
<thead>
<tr>
<th>No need</th>
<th>Very necessary</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Do you have some comments?
B.12. EU Financial Perspectives 2014-2020: Please attribute a level of priority and a level of probability to each of the following new financial instruments which could eventually be implemented in the Mediterranean.

<table>
<thead>
<tr>
<th>Less Priority</th>
<th>More Priority</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

A. Mediterranean Macroregion (such as the Baltic Strategy or the upcoming Danube Macoerregion)

B. Mechanisms for participation of the MPCs in the EU’s Structural Funds or similar financial instruments

C. A major new Regional Programme within the ENPI to finance multilateral projects

Other suggested instruments:

B.13. EU Financial Perspectives 2014-2020:
How do you assess the probabilities of the new Financial Perspectives increasing substantially (i.e., more than 30%) the available funds for EUMediterranean Partner Countries’ financial cooperation (i.e., the financial envelope for the ENPI-South)?

<table>
<thead>
<tr>
<th>Less probability</th>
<th>More Probability</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Do you have some comments?


B.14. **EU Financial Perspectives 2014-2020**: What degree of probability do you attribute to the following potential mid- to long-term hypotheses in the Mediterranean under the present level and framework of cooperation?

<table>
<thead>
<tr>
<th>Hypothesis</th>
<th>No importance</th>
<th>Very high importance</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. The Arab-Israeli conflict will paralyse the EMP</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>B. Political regimes in MPCs will show a high degree of continuity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. The current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>D. Gulf Cooperation Council members will facilitate a higher degree of South-South economic cooperation in the Mediterranean</td>
<td></td>
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</tr>
<tr>
<td>E. Environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. Water scarcity will become a source of conflicts and social tensions in the Mediterranean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G. Women will increasingly participate in the economic, social and political life of MPCs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H. MPCs will sustain the increased level of economic growth achieved in the last three years and, in the long term, converge to EU levels of income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I. Population and employment pressures in MPCs will intensify and create dramatic social tensions</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>J. Irregular migration from originating MPCs to Europe will continue to increase whatever control mechanisms the EU may impose</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K. Free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>L. Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>M. Increased level of migration will push for political reforms in the Mediterranean Partner Countries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N. The increased level of migration, economic and human exchanges will give way to the emergence of a common</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?

B.15. **EU Financial Perspectives 2014-2020**: How would you assess the contribution of the current Euro-Mediterranean economic and financial cooperation (including Euromed Free Trade Area 2010, sectoral cooperation and ENPI) to real convergence of income levels (measured in GDP per capita) across the Mediterranean?

<table>
<thead>
<tr>
<th>Contribution</th>
<th>No contribution</th>
<th>High contribution</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Do you have some comments?
BLOCK C

THE EURO-MEDITERRANEAN FREE TRADE AREA (EMFTA) IN 2010 AND BEYOND, AND THE ECONOMIC AND FINANCIAL COOPERATION
### C.1. General economic context

What degree of probability do you attribute to the following scenarios about the impact of the global economic crisis on the Euro Mediterranean Partnership?

<table>
<thead>
<tr>
<th>Scenario</th>
<th>No importance</th>
<th>Very high importance</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. A negative long-term impact, as it will permanently reduce the ability of the EU to mobilise and make available resources for Euro-Mediterranean cooperation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. A negative long-term impact, as it will intensify the social tensions in Europe and hence the resistance to cooperation with Southern Mediterranean Countries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. A negative long-term impact, as it will highlight the focus of the EU to resolve its own economic problems without integrating the MPCs in its economic strategies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. A positive long-term impact, as it will highlight the need for more Euro-Mediterranean cooperation and for joint strategies across the Mediterranean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. A positive long-term impact, as EU companies will face market contraction in Europe and the need to reduce costs by investing and looking for new markets in Mediterranean Partner Countries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. A positive long-term impact, as it will reinforce the need for the EU to integrate its near neighbourhood, including the Mediterranean, into its economic area Do you have some comments?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?

### C.2. General economic context

How would you grade the added value of regional economic integration in the Mediterranean (in particular through the creation of the Euro-Mediterranean Free Trade Area) in relation to the general process of globalisation and global trade liberalisation?

<table>
<thead>
<tr>
<th>Added value</th>
<th>Very high added value</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>No added value</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?
### C.3. General economic context
How would you assess the probability that the external economic actors, such as the United States, China, the Gulf countries or others, will gradually displace the prominent economic role of the EU in the Mediterranean?

<table>
<thead>
<tr>
<th>No probability</th>
<th>Very high probability</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

A. In the Maghreb
B. In the Mashreq

Do you have some comments?

---

How would you assess the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

A. EMFTA in general
B. Algeria
C. Egypt
D. Israel
E. Jordan
F. Lebanon
G. Morocco
H. Occupied Palestinian Territory
I. Tunisia

Do you have some comments?

---

Do you have a good knowledge or a clear perception on the impact of the Euro-Mediterranean Free Trade Area and the EU-Turkey Customs Union?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

- Go to question C6
C.5.1. How would you assess the impact of the Euro-Mediterranean Free Trade Areas in the economies of the Mediterranean Partner Countries in terms of growth and competitiveness, social impact, impact on Small- and Medium-Sized Enterprises and fiscal impact?

### Impact on growth, competitiveness and Foreign Direct Investment

<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **A. In the MPCs**
- **B. [only for MPC nationals]** And in your own country

### Impact on employment and social impact

<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **C. In the MPCs**
- **D. [only for MPC nationals]** And in your own country

### Impact on local Small- and Medium-Sized Enterprises

<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **E. In the MPCs**
- **F. [only for MPC nationals]** And in your own country

### Fiscal impact (impact on State revenues)

<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
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</tbody>
</table>

- **G. In the MPCs**
- **H. [only for MPC nationals]** And in your own country

*MPC nationals = QUESTION A.2 = 2, 11, 21, 23, 30, 32, 40, 41, 42

**Do you have some comments?**

---

**C.5.2. EU-Turkey Customs Unions**

How would you assess the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy?

### Impact on growth, competitiveness and Foreign Direct Investment

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
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</tbody>
</table>

- **A. Impact on growth, competitiveness and Foreign Direct Investment**
- **B. Impact on employment and social impact**
- **C. Impact on local Small- and Medium-Sized Enterprises**
- **D. Fiscal impact (impact on State revenues)**

**Do you have some comments?**
C.5.3. To what extent do you think that the bilateral free trade agreements concluded between Turkey and the MPCs contribute to the establishment of the Euro-Mediterranean Free Trade Area?

<table>
<thead>
<tr>
<th>No contribution</th>
<th>Very positive contribution</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
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<td>5</td>
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<td>9</td>
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<td></td>
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</tbody>
</table>

Do you have some comments?

C.6. South-South Integration and Rules of Origin
How would you assess progress in the implementation of South-South free trade areas in the Mediterranean?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
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</tr>
</tbody>
</table>

A. Agadir Agreement (2007, Morocco, Tunisia, Egypt and Jordan)
B. General Arab Free Trade Agreement (League of Arab States)
C. Arab Maghreb Union

Do you have some comments?

C.7. South-South Integration and Rules of Origin
Do you have a good knowledge or clear perception on the effectiveness of the System of Pan-Euro-Mediterranean Rules of Origin?

Yes
No - Go to question C8

C.7.1. How would you explain the low use of the System of Pan-Euro-Mediterranean Rules of Origin? (mark the two most relevant reasons)

<table>
<thead>
<tr>
<th>First</th>
<th>Second</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Lack of knowledge by trade operators</td>
<td></td>
</tr>
<tr>
<td>B. It is an overly complex system</td>
<td></td>
</tr>
<tr>
<td>C. Administrative costs of applying the Pan-Euro-Mediterranean rules of origin are too high</td>
<td></td>
</tr>
<tr>
<td>D. The current system is not well adapted and developed</td>
<td></td>
</tr>
<tr>
<td>E. Lack of compatibility with other systems of rules of origin</td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?
**C.8. Services Trade Liberalisation**
How would you assess the progress of on-going negotiations for services trade liberalisation between the EU and Mediterranean Partner Countries (there are negotiations with Morocco, Tunisia, Egypt and Israel)?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
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</tbody>
</table>

Do you have some comments?

**C.9. Liberalisation of trade in agricultural products**
How would you assess the progress in trade liberalisation of agriculture and processed agricultural products in the Euro-Mediterranean framework?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
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<td>10</td>
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</tr>
</tbody>
</table>

Do you have some comments?

**C.10. Liberalisation of trade in agricultural products**
Do you have a good knowledge or clear perception on the impact of agricultural liberalisation?

**YES**

**NO** → Go to question C11

**C.10.1. How do you assess the potential impact of full agricultural liberalisation on the EU Member States and MPC agricultural sectors?**

<table>
<thead>
<tr>
<th>Very negative impact</th>
<th>Very positive impact</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>5</td>
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<tr>
<td>9</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

A. On EU Member States

B. On MPCs (assuming full bilateral liberalisation)

C. On MPCs (assuming unilateral asymmetric liberalisation by the EU)

Do you have some comments?
### C.10.2. How do you assess the probability of the EU offering to the Mediterranean Partner Countries anytime in the foreseeable future a full agricultural trade liberalisation to access the single market free of any barrier?

<table>
<thead>
<tr>
<th>No probability</th>
<th>Very high probability</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
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</table>

Do you have some comments?

### C.11. Liberalisation of trade in agricultural products

How would you assess the added value of the new Deep and Comprehensive Free Trade Areas to be established by the EU with the Mediterranean Partner Countries (including agriculture and services as well as approximation of standards and technical legislation, in addition to conformity assessment)?

<table>
<thead>
<tr>
<th>No added value</th>
<th>Very high added value</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
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</tbody>
</table>

Do you have some comments?

### C.12. Assessment of financial cooperation

What is your global assessment of the effectiveness of the bilateral assistance granted through the European Neighbourhood and Partnership Instrument (ENPI)?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
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<td>10</td>
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</tbody>
</table>

Do you have some comments?

### C.13. Assessment of financial cooperation

How would you assess the effectiveness of direct budget support as a mechanism for EU financial aid to Mediterranean Partner Countries?

<table>
<thead>
<tr>
<th>Very ineffective</th>
<th>Very effective</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
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<td>10</td>
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</tbody>
</table>

Do you have some comments?
BLOCK D

SECTORAL COOPERATION
**D.1. Industrial modernisation programmes and industrial cooperation**


<table>
<thead>
<tr>
<th>Progress</th>
<th>No progress</th>
<th>Regression</th>
<th>Don’t know</th>
</tr>
</thead>
</table>

**A. Improving the business environment**: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.

**B. Facilitation of the trade of industrial products**: approximation of technical legislation and standards leading to bilateral “ACAA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).

**C. Promoting innovation and technology transfer**: exploiting the results of the programme “Medibtkar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.

**D. Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.**

**E. Dialogue on the future of the textile and clothing sector**: strengthening social dialogue as well as promotion of innovation.

Do you have some comments?

---

**D.2. Industrial modernisation programmes and industrial cooperation**

Do you have a good knowledge or clear perception on industrial and investment cooperation in the Mediterranean?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Go to question D3</td>
</tr>
</tbody>
</table>

---

**D.2.1. What is your assessment of the “Invest in Med” regional programme?**

**Invest in Med**: A Euro-Mediterranean Network of organisations committed to investment promotion and trade facilitation, strengthening SME collaboration and exchange of best practices Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia

**Timeframe**: 2008-2011

**Budget**: € 9 million

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
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</table>

Do you have some comments?

---
**D.2.2. Industrial modernisation programmes and industrial cooperation.** How would you assess the effectiveness and impact of the industrial modernisation (*mise-à-niveau*) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs?

<table>
<thead>
<tr>
<th></th>
<th>Very low</th>
<th>Very high</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>A. Egypt (€ 250 mil.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Tunisia (€ 50 mil.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Jordan (EJADA, € 40 mil.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Lebanon (€ 40 mil.)</td>
<td></td>
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</tbody>
</table>

Do you have some comments?

---

**D.3. Water sector cooperation**

How would you assess the level of priority of water cooperation in the framework of the EMP/UfM?

<table>
<thead>
<tr>
<th></th>
<th>Very low</th>
<th>Very high</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
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</tbody>
</table>

Do you have some comments?

---

**D.4. Water sector cooperation**

Please indicate the level of importance for each of the priorities for D.4. water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008).

<table>
<thead>
<tr>
<th></th>
<th>Very low</th>
<th>Very high</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>A. Adaptation to climate change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Balance between supply and demand</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Conservation and rehabilitation of natural environments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. De-pollution of the Mediterranean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Technologies and efficient use of water</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?
## D.5. Water sector cooperation

Do you have a good knowledge or a clear perception on Euro-Mediterranean water cooperation?

<table>
<thead>
<tr>
<th>YES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NO</td>
<td>Go to question D6</td>
</tr>
</tbody>
</table>

### D.5.1. Among the eight cross-cutting objectives mentioned in the draft declaration of the April 2010 conference held in Barcelona regarding the Strategy for Water in the Mediterranean, how do you see the prospects for progress over the short term on each of them?

<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**A.** Ensure the integration of policies, taking into consideration all the legitimate water uses and demands, including the environmental needs

**B.** Enhance and facilitate the participation of all stakeholders, with emphasis on gender-balanced and poverty alleviation considerations

**C.** Increase citizens' awareness of the value of water and its culture, enhance education for environmental and sustainable development

**D.** Ensure the capacity building of water management and environmental protection administrations, technicians, farmers and all competent stakeholders

**E.** Secure comparable water data collection and monitoring

**F.** Support research in all water aspects, such as desertification and climate change

**G.** Establish and support fair and socially sensitive valuation and cost recovery, including tariffs to support operation and maintenance costs and fees collection

**H.** Ensure optimal use of available instruments, e.g. Best Available Techniques (BATs) and Best Environmental Practices (BEPs) as well as Environmental Impact Assessment (EIA) and Strategic Environmental Assessment (SEA)


<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**A.** Sustainable Water Management and De-pollution of the Mediterranean

- Aims at enforcing sustainable water management policies, disseminating good practices in the region and supporting the initiative for the de-pollution of the Mediterranean Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia
- Timeframe: 2009-2013
- Budget: € 2 million
D.5.3. What is your assessment of the following regional programme?

**MEDA WATER – Resource management.** Reinforces regional cooperation and develops proposals on water management, through capacity strengthening, training, information and know-how exchanges.
Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey
Timeframe: 2003-2008  Budget: € 40 million (MEDA)

<table>
<thead>
<tr>
<th>Very negative</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>9</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?

---

D.6. Energy cooperation

Do you consider progress was achieved between July 2009-July 2010 in the implementation of the 2008-2013 Limassol Priority Action Plan on the Euro-Mediterranean Energy Partnership?

A. Improving harmonisation and integration of markets and legislation
B. Promoting sustainable development in the sector
C. Developing initiatives of common interests in key areas, such as infrastructure extension, investment financing and R & D

<table>
<thead>
<tr>
<th>Progress</th>
<th>No progress</th>
<th>Regression</th>
<th>Don’t know</th>
</tr>
</thead>
</table>

Do you have some comments?

---

D.7. Energy cooperation

Do you have a good knowledge or a clear perception on the Euro-Mediterranean energy sector cooperation?

YES
NO - Go to question D8

- Go to question D8
### D.7.1. Regional energy projects

How would you evaluate the following regional projects?

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Timeframe</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Electricity market integration</td>
<td>2007-2010</td>
<td>€ 4.9 million (MEDA)</td>
</tr>
<tr>
<td>B. EAMGM II – Euro-Arab Mashreq Gas Market Project</td>
<td>2010-2013</td>
<td>€ 5 million EU contribution</td>
</tr>
<tr>
<td>C. MED-EMIP – Energy cooperation</td>
<td>2007-2010</td>
<td>€ 4.1 million (MEDA)</td>
</tr>
<tr>
<td>D. MED-ENEC II – Energy efficiency in construction</td>
<td>2009-2013</td>
<td>€ 5 million</td>
</tr>
</tbody>
</table>

### D.7.2. How do you evaluate the relevance of the project “Paving the Way for the Mediterranean Solar Plan” adopted by the European Commission in November 2009 (EUR 5 million) supporting improvement of framework conditions for renewable energy?

<table>
<thead>
<tr>
<th>Relevance</th>
<th>Very low</th>
<th>Very high</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low relevance</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High relevance</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### D.8. Environmental cooperation

In your opinion, what is the added value of addressing the environment challenges in the Mediterranean at the regional level (i.e., in the EMP or UfM framework) instead of addressing them in the global framework of the United Nations, such as the Plan Bleu and others?

<table>
<thead>
<tr>
<th>Added value</th>
<th>Very low</th>
<th>Very high</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low added value</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High added value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?
### D.9. Environmental cooperation

Do you have a good knowledge or a clear perception on Euro-Mediterranean environmental cooperation?

<p>| | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Go to question D10

#### D.9.1. How do you assess progress in each of the following sectors identified in the Horizon 2020 strategy?

<table>
<thead>
<tr>
<th>Sector</th>
<th>Progress</th>
<th>No progress</th>
<th>Regression</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Municipal waste</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Urban waste water</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Industrial emissions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?

#### D.9.2. What is your assessment of the following regional programmes?

<table>
<thead>
<tr>
<th>Programme</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. SMAP III – Sustainable environmental development</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotes sustainable development and supports high priority environmental related activities, through technical and financial assistance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestine Territory, Syria, Tunisia, Turkey</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeframe: 2005-2008 Budget: € 15 million (MEDA)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. SAFEMED II – Maritime safety and pollution prevention</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotes cooperation in maritime safety and security and prevention of pollution from ships by providing technical advice and support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestine Territory, Syria, Tunisia, Turkey Timeframe: 2009-2011 Budget:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>€ 5.5 million (ENPI South)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do you have some comments?
### D.10. Food Security

In your opinion, which of the following issues are more relevant for the next Ministerial Meeting in the field of food security, agriculture and rural development?

<table>
<thead>
<tr>
<th>Very low</th>
<th>Very high</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- A. Sustainable rural development
- B. Development and promotion of quality products
- C. Coordination of agricultural research
- D. Activities in the area of sanitary and phytosanitary norms
- E. Strengthening public policies for agricultural development
- F. Creating grain stocks for the region
- G. Implementing Mediterranean diet education policies
- H. Developing agri-food industries in the Mediterranean
- I. Increasing the articulation between the EU’s Common Agricultural Policy (CAP) and agricultural challenges for the Mediterranean Partner Countries
- J. Gradually extending the CAP to Mediterranean Partner Countries

Other?
BLOCK A

COMPOSITION OF THE SAMPLE
**Respondents by kind of Institution (% on total respondents)**

- **Civil Society**: 29%
- **Experts**: 42%
- **Policy-makers**: 29%
- **Governmental**: 57%
- **NGO**: 75%
- **Academic**: 71%
- **Think Tank**: 21%
- **EU Institution**: 12%
- **Diplomatic**: 7%
- **Company (Business Sector)**: 22%
- **Trade Union**: 3%
- **Media**: 0.8%
- **Other International Organisation**: 24%
- **Governmental**: 57%
**Respondents by geographical origin** (% on total respondents)

- Mediterranean Partner Countries: 49.5%
- EU-27: 47.3%
- Others: 3.2%

**Respondents by country group**

- Mediterranean EU Countries: 27%
- Rest of EU: 23%
- Maghreb: 20%
- Mashreq: 19%
- Turkey: 5.4%
- Israel: 3%
- European non EU: 2.5%

**Respondents by gender** (% on total respondents)

- Men: 71%
- Women: 29%

**European Union Countries**

- Men: 66%
- Women: 34%

**Mediterranean Partner Countries**

- Men: 76%
- Women: 24%
Composition of the Sample

**Respondents by main area of specialisation (%)**

- Political Cooperation and Security: 31.4%
- Economic and Financial Cooperation: 29.4%
- Social, Cultural and Human Exchanges: 37%
- Migration and Justice Affairs: 2.2%

**Main area of specialisation by region (%)**

<table>
<thead>
<tr>
<th>Region</th>
<th>Political Cooperation and Security</th>
<th>Economic and Financial Cooperation</th>
<th>Social, Cultural and Human Exchanges</th>
<th>Migration and Justice Affairs</th>
</tr>
</thead>
<tbody>
<tr>
<td>European Union Countries</td>
<td>26.1</td>
<td>25.1</td>
<td>40.8</td>
<td>8</td>
</tr>
<tr>
<td>Mediterranean Partner Countries</td>
<td>19.2</td>
<td>31.8</td>
<td>42.6</td>
<td>6.4</td>
</tr>
</tbody>
</table>
BLOCK B

**Global Assessment**

B1. What is your global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean in the July 2008-September 2010 period?

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>14</td>
<td>28</td>
<td>67</td>
<td>90</td>
<td>87</td>
</tr>
<tr>
<td>3%</td>
<td>5%</td>
<td>12%</td>
<td>16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

---

**Global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean in the July 2008-September 2010 period (average on a scale of 0-10)**

- Mediterranean Partner Countries: 4.8
- EU-27: 4.36
- Survey mean: 4.57
- Maghreb: 4.31
- Mashreq: 5.13
- Mediterranean EU Countries: 4.11
- Rest of EU: 4.66
- European non EU: 5.83

---

**Global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean in the July 2008-September 2010 period (%)**

- Very positive
  - 10: 0%
  - 9: 0%
  - 8: 0%
  - 7: 0%
  - 6: 0%
  - 5: 0%
  - 4: 0%
  - 3: 0%
  - 2: 0%
  - 1: 0%
- Very disappointing
  - 0: 2%
  - 1: 0%
  - 2: 0%
  - 3: 0%
  - 4: 0%
  - 5: 0%
  - 6: 0%
  - 7: 0%
  - 8: 0%
  - 9: 0%
  - 10: 0%

---

**Euromed Survey 2009: What is your global assessment of the results of the Euro-Mediterranean Partnership (EMP) in the 2005-2009 period amongst experts and actors involved in it?**

**Euromed Survey 2010: What is your global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean in the July 2008-September 2010 period?**
Global assessment of the results of the Euro-Mediterranean Partnership/Union for the Mediterranean (average on a scale of 0-10)

- **Turkey**: 4.93
- **Israel**: 5.14
- **Mashreq**: 5.13
- **Maghreb**: 4.87
- **European non EU Mediterranean EU Countries**: 4.31
- **Rest of EU**: 4.03
- **EU-27**: 4.66
- **Survey mean**: 4.67

**Assessment of EU Presidencies and EU and MPC Co-Presidencies**

**B2. How would you grade the action of the different EU Presidencies and Co-Presidencies of the Union for the Mediterranean (UfM)?**

<table>
<thead>
<tr>
<th>Country/Presidency</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>French EU Presidency (July-December 2008)</strong></td>
<td>12  13  23  26  41  102  77  88  60  36  11</td>
<td>489</td>
<td>109 598</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Czech EU Presidency (January-June 2009)</strong></td>
<td>22  30  38  52  83  102  41  27  25  11  0</td>
<td>431</td>
<td>167 598</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Swedish EU Presidency (July-December 2009)</strong></td>
<td>3  11  20  31  58  111  71  74  41  25  3</td>
<td>448</td>
<td>150 598</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Spanish EU Presidency (January-June 2010)</strong></td>
<td>3  8  7  17  34  102  107  105  52  45  14</td>
<td>494</td>
<td>104 598</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Egyptian Co-Presidency of the UfM (July 2008-July 2010)</strong></td>
<td>27  30  52  34  64  97  51  50  33  20  6</td>
<td>464</td>
<td>134 598</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>French Co-Presidency of the UfM (July 2008-July 2010)</strong></td>
<td>14  24  46  34  55  98  65  61  33  28  10</td>
<td>468</td>
<td>130 598</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

**Grading the action of the different EU Presidencies and Co-Presidencies of the Union for the Mediterranean (UfM)** (average on a scale of 0-10)

- **French Co-Presidency of the UfM (July 2008-July 2010)**: 5.04
- **Egyptian Co-Presidency of the UfM (July 2008-July 2010)**: 4.61
- **Spanish EU Presidency (January-June 2010)**: 6.19
- **Swedish EU Presidency (July-December 2009)**: 5.49
- **Czech EU Presidency (January-June 2009)**: 4.26
- **French EU Presidency (July-December 2008)**: 5.73
Grading the action of the different EU Presidencies and Co-Presidencies of the Union for the Mediterranean (UfM). Comparing 2009 and 2010 results
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Country/Presidency</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>French Co-Presidency of the UfM (July 2008-July 2010)</td>
<td>4.61</td>
<td>5.04</td>
</tr>
<tr>
<td>Egyptian Co-Presidency of the UfM (July 2008-July 2010)</td>
<td>4.28</td>
<td>4.61</td>
</tr>
<tr>
<td>Czech EU Presidency (January-June 2009)</td>
<td>3.42</td>
<td>4.26</td>
</tr>
<tr>
<td>French EU Presidency (July-December 2008)</td>
<td>5.09</td>
<td>5.73</td>
</tr>
</tbody>
</table>

Secretariat of the Union for the Mediterranean

B3. How would you assess progress made regarding the setting up of the UfM Secretariat between November 2008 and September 2010?

<table>
<thead>
<tr>
<th>Assessment of progress made regarding the setting up of the UfM Secretariat between November 2008 and September 2010 (average on a scale of 0-10)</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>4.43</td>
<td>4.43</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
<tr>
<td>EU-27</td>
<td>4.43</td>
<td>4.43</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
<tr>
<td>Survey mean</td>
<td>4.5</td>
<td>4.5</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
<tr>
<td>Maghreb</td>
<td>4</td>
<td>4</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
<tr>
<td>Mashreq</td>
<td>4.84</td>
<td>4.84</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>4.7</td>
<td>4.7</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>4.79</td>
<td>4.79</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
<tr>
<td>European non EU</td>
<td>6.36</td>
<td>6.36</td>
<td>503</td>
<td>503</td>
<td>503</td>
</tr>
</tbody>
</table>

(* Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(** Total number of respondents including “Don’t know” answers)
UfM Global Assessment (%)

Very positive: 10%
Very disappointing: 2%

UfM Global Assessment
(average on a scale of 0-10)

Turkey: 5.24
Israel: 5.33
Mashreq: 4.84
Maghreb: 6.36
European non EU: 4.17
Mediterranean EU Countries: 4.79
Rest of EU: 4.43
EU-27: 4.50
Survey mean: 5.45

B4. Do you expect the Secretariat to play a key, moderate or negligible role in the new Euro-Mediterranean institutional architecture in the near future?

<table>
<thead>
<tr>
<th>Negligible role</th>
<th>Key role</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secretariat of the UfM</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Negligible role</td>
<td>5</td>
<td>20</td>
<td>27</td>
<td>51</td>
</tr>
</tbody>
</table>
UfM Secretariat’s role in the new Euro-Mediterranean institutional architecture in the near future
(average on a scale of 0-10)

- Mediterranean Partner Countries: 6.33
- EU-27: 5.8
- Survey mean: 6.04
- Maghreb: 6.36
- Mashreq: 6.39
- Mediterranean EU Countries: 5.78
- Rest of EU: 5.83
- European non EU: 7

UfM Secretariat’s role in the new Euro-Mediterranean institutional architecture in the near future. Comparing 2009 and 2010 results (%)

Key role
- Euromed Survey 2010: 10%
- Euromed Survey 2009: 9%

Moderate role
- Euromed Survey 2010: 12%
- Euromed Survey 2009: 16%

Negligible role
- Euromed Survey 2010: 9%
- Euromed Survey 2009: 4%

Euromed Survey 2010: Do you expect the Secretariat to play a key, moderate or negligible role in the new Euro-Mediterranean institutional architecture in the near future?
Euromed Survey 2009: Do you expect that the Secretariat of the Union for the Mediterranean, to be established in Barcelona as approved in the Marseilles Conference, will play a key, moderate or negligible role in the new institutional architecture of the Euro-Mediterranean Partnership?
Summits of the Union for the Mediterranean

B5. How do you assess the importance of the Summits of Heads of State or Government for the advancement of the Union for the Mediterranean?

<table>
<thead>
<tr>
<th>Summits of Heads of State or Government</th>
<th>No importance</th>
<th>Very high importance</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
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<td></td>
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<tr>
<td>Summits of Heads of State or Government</td>
<td>11 16 18 33 54 63 71 85 102 65 59</td>
<td></td>
<td>575</td>
<td>23</td>
<td>598</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

Importance of the Summits of Heads of State or Government (average on a scale of 0-10)

- Mediterranean Partner Countries: 6.34
- EU-27: 5.51
- Survey mean: 6.42
- Maghreb: 6.58
- Mashreq: 6.74
- Mediterranean EU Countries: 6.51
- Rest of EU: 6.52
- European non EU: 7.43

Importance of the Summits of Heads of State or Government (%)

- Don’t know: 4%
- Very high importance: 10%
- 9: 11%
- 8: 18%
- 7: 15%
- 6: 12%
- 5: 11%
- 4: 10%
- 3: 5%
- 2: 3%
- 1: 3%
- No importance: 2%
B6. How do you assess the progress achieved in the implementation of the following Euro-Mediterranean sectoral strategies and action plans? How do you evaluate their potential contribution to the achievements in the overall Euro-Mediterranean objectives?

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Progress achieved</th>
<th>Importance for Euromed Objectives</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Istanbul Action Plan on Strengthening the Role of Women in Society</td>
<td>203</td>
<td>217</td>
<td>598</td>
<td></td>
</tr>
<tr>
<td>(adopted in November 2006)</td>
<td>53%</td>
<td>36%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional Transport Action Plan for the Mediterranean</td>
<td>161</td>
<td>250</td>
<td>598</td>
<td></td>
</tr>
<tr>
<td>(adopted in May 2007)</td>
<td>46%</td>
<td>42%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(adopted in December 2007)</td>
<td>55%</td>
<td>36%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working Programme on Tourism (announced in April 2008)</td>
<td>156</td>
<td>251</td>
<td>598</td>
<td></td>
</tr>
<tr>
<td>(adopted in October 2008)</td>
<td>45%</td>
<td>42%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Euro-Mediterranean Indus-trial Cooperation</td>
<td>156</td>
<td>244</td>
<td>598</td>
<td></td>
</tr>
<tr>
<td>Working Programme (adopted in October 2008)</td>
<td>44%</td>
<td>41%</td>
<td></td>
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</tr>
<tr>
<td>Mediterranean Maritime Strategy (announced in the Marseilles Declaration</td>
<td>16</td>
<td>264</td>
<td>598</td>
<td></td>
</tr>
<tr>
<td>2009-2010 Working Programme (adopted in October 2008)</td>
<td>35%</td>
<td>44%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Framework of Actions (adopted in November 2008)</td>
<td>74</td>
<td>230</td>
<td>598</td>
<td></td>
</tr>
<tr>
<td>Mediterranean Water Strategy (still to be approved after the Ministerial</td>
<td>119</td>
<td>231</td>
<td>598</td>
<td></td>
</tr>
<tr>
<td>Meeting in April 2010)</td>
<td>32%</td>
<td>39%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers
Assessment of the progress achieved of the Euro-Mediterranean action plans and sectoral strategies (%)

- Istanbul Action Plan on Strengthening the Role of Women in Society (adopted in November 2006)
  - Progress: 53%, No progress: 43%, Regression: 3%, Don't know: 36%
- Regional Transport Action Plan for the Mediterranean (adopted in May 2007)
  - Progress: 46%, No progress: 51%, Regression: 3%, Don't know: 42%
  - Progress: 55%, No progress: 41%, Regression: 4%, Don't know: 36%
- Working Programme on Tourism (announced in April 2008)
  - Progress: 45%, No progress: 48%, Regression: 8%, Don't know: 42%
  - Progress: 44%, No progress: 49%, Regression: 7%, Don't know: 41%
- Mediterranean Maritime Strategy (announced in the Marseilles Declaration 2008)
  - Progress: 35%, No progress: 59%, Regression: 6%, Don't know: 44%
  - Progress: 20%, No progress: 59%, Regression: 21%, Don't know: 39%
- Mediterranean Water Strategy (still to be approved after the Ministerial Meeting in April 2010)
  - Progress: 32%, No progress: 55%, Regression: 13%, Don't know: 39%

Importance of the Euro-Mediterranean action plans and sectoral strategies for Euromed objectives
(average on a scale of 0-10)

- Istanbul Action Plan on Strengthening the Role of Women in Society (adopted in November 2006)
  - Score: 7.21
- Regional Transport Action Plan for the Mediterranean (adopted in May 2007)
  - Score: 7.44
  - Score: 7.91
- Working Programme on Tourism (announced in April 2008)
  - Score: 7.06
  - Score: 7.43
- Mediterranean Maritime Strategy (announced in the Marseilles Declaration 2008)
  - Score: 7.36
  - Score: 7.62
- Mediterranean Water Strategy (still to be approved after the Ministerial Meeting in April 2010)
  - Score: 8.27
Importance for Euromed objectives: The Istanbul Action Plan on the Role of Women in Society (average on a scale of 0-10)

Importance for Euromed objectives: The Regional Transport Plan for the Mediterranean (average on a scale of 0-10)
## Importance for Euromed objectives: The Regional Transport Plan for the Mediterranean (%)

<table>
<thead>
<tr>
<th>Importance Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very high</td>
<td>21.1%</td>
</tr>
<tr>
<td>High</td>
<td>14.6%</td>
</tr>
<tr>
<td>Medium</td>
<td>121%</td>
</tr>
<tr>
<td>Low</td>
<td>11.9%</td>
</tr>
<tr>
<td>Very low</td>
<td>2.1%</td>
</tr>
<tr>
<td>No importance</td>
<td>0%</td>
</tr>
</tbody>
</table>

## Importance for Euromed objectives: The 2008-2013 Priority Action Plan on Energy (average on a scale of 0-10)

- **Mediterranean Partner Countries:**
  - Survey mean: 7.77
- **EU-27:**
  - Survey mean: 8.04
- **Maghreb:**
  - Survey mean: 7.48
- **Mashreq:**
  - Survey mean: 8.13
- **Mediterranean EU Countries:**
  - Survey mean: 8.01
- **Rest of EU:**
  - Survey mean: 8.08
- **European non EU:**
  - Survey mean: 8.33

## Importance for Euromed objectives: The 2008-2013 Priority Action Plan on Energy (%)

<table>
<thead>
<tr>
<th>Importance Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very high</td>
<td>20.8%</td>
</tr>
<tr>
<td>High</td>
<td>20.6%</td>
</tr>
<tr>
<td>Medium</td>
<td>13.6%</td>
</tr>
<tr>
<td>Low</td>
<td>7.6%</td>
</tr>
<tr>
<td>Very low</td>
<td>2.3%</td>
</tr>
<tr>
<td>No importance</td>
<td>0.2%</td>
</tr>
</tbody>
</table>
Importance for Euromed objectives: The Working Programme on Tourism
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Category</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>7.2</td>
<td>6.94</td>
<td>7.06</td>
<td>6.92</td>
<td>7.49</td>
<td>7.06</td>
<td>6.38</td>
<td>7.17</td>
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<tr>
<td>Eu-27</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Survey mean</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maghreb</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Mashreq</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rest of EU</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>European non EU</td>
<td></td>
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</tbody>
</table>

Importance for Euromed objectives: The Working Programme on Tourism (%)

<table>
<thead>
<tr>
<th>Category</th>
<th>Very high importance</th>
<th>10</th>
<th>9</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>0</th>
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<td>Mediterranean Partner Countries</td>
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<td></td>
<td></td>
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<tr>
<td>EU-27</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Survey mean</td>
<td>13.1%</td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Maghreb</td>
<td>12.7%</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Mashreq</td>
<td>4.6%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Mediterranean EU Countries</td>
<td>18.9%</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rest of EU</td>
<td>22.6%</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>European non EU</td>
<td>19.4%</td>
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</tbody>
</table>

Importance for Euromed objectives: The Euro-Mediterranean Industrial Cooperation 2009-2010 Working Programme
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Category</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>7.44</td>
<td>7.42</td>
<td>7.43</td>
<td>7.33</td>
<td>7.44</td>
<td>7.46</td>
<td>6.89</td>
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<tr>
<td>EU-27</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Survey mean</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
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<td>Maghreb</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Rest of EU</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>European non EU</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Importance for Euromed objectives: The Euro-Mediterranean Industrial Cooperation 2009-2010 Working Programme (%)

Importance for Euromed objectives: The Mediterranean Maritime Strategy (average on a scale of 0-10)

Importance for Euromed objectives: The Mediterranean Maritime Strategy (%)
Importance for Euromed objectives: The Employment Framework of Actions (average on a scale of 0-10)

Importance for Euromed objectives: The Mediterranean Water Strategy (average on a scale of 0-10)
B7. How do you assess the progress achieved regarding the six projects selected so far in the framework of the UfM? How do you evaluate their potential contribution to the achievements of the overall Euro-Mediterranean objectives?

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Progress achieved</th>
<th>No Importance</th>
<th>Very High Importance</th>
<th>Total</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>P</td>
<td>NP</td>
<td>R</td>
<td>Total*</td>
<td>Dkn</td>
<td>Total**</td>
</tr>
<tr>
<td>De-pollution of the Mediterranean Sea</td>
<td>120</td>
<td>263</td>
<td>26</td>
<td>409</td>
<td>189</td>
<td>598</td>
</tr>
<tr>
<td>Maritime and land highways</td>
<td>114</td>
<td>236</td>
<td>12</td>
<td>362</td>
<td>236</td>
<td>598</td>
</tr>
<tr>
<td>Civil protection initiatives to combat natural and man-made disasters</td>
<td>130</td>
<td>223</td>
<td>24</td>
<td>377</td>
<td>221</td>
<td>598</td>
</tr>
<tr>
<td>Alternative energies: Mediterranean Solar Plan</td>
<td>256</td>
<td>162</td>
<td>10</td>
<td>428</td>
<td>170</td>
<td>598</td>
</tr>
<tr>
<td>Higher education and research, Euro-Mediterranean University in Slovenia and Fez</td>
<td>230</td>
<td>144</td>
<td>25</td>
<td>399</td>
<td>199</td>
<td>598</td>
</tr>
<tr>
<td>Mediterranean Business Development Initiative focusing on micro, small- and medium- sized enterprises</td>
<td>181</td>
<td>198</td>
<td>19</td>
<td>398</td>
<td>200</td>
<td>598</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers
Monitoring of Progress and Achievements of the EMP/UfM

Assessment of the progress achieved of the six projects selected in the framework of the UfM (%)

De-pollution of the Mediterranean Sea
- Progress: 29%
- No progress: 64%
- Regression: 6%
- Don’t know: 32%

Maritime and land highways
- Progress: 31%
- No progress: 65%
- Regression: 3%
- Don’t know: 39%

Civil protection initiatives to combat natural and man-made disasters
- Progress: 34%
- No progress: 59%
- Regression: 6%
- Don’t know: 37%

Alternative energies: Mediterranean Solar Plan
- Progress: 60%
- No progress: 38%
- Regression: 2%
- Don’t know: 28%

Higher education and research, Euro-Mediterranean University in Slovenia and Fez
- Progress: 58%
- No progress: 36%
- Regression: 6%
- Don’t know: 33%

Mediterranean Business Development Initiative focusing on micro, small- and medium-sized enterprises
- Progress: 45%
- No progress: 50%
- Regression: 5%
- Don’t know: 33%

Assessment of the importance of the six projects selected in the framework of the UfM for Euromed objectives.
Comparing 2009 and 2010 results
(average on a scale of 0-10)

De-pollution of the Mediterranean Sea
- Euromed Survey 2009: 7.46
- Euromed Survey 2010: 8.21

Maritime and land highways
- Euromed Survey 2009: 7.75
- Euromed Survey 2010: 6.58

Civil protection initiatives to combat natural and man-made disasters
- Euromed Survey 2009: 8.83
- Euromed Survey 2010: 6.92

Alternative energies: Mediterranean Solar Plan
- Euromed Survey 2009: 6.32
- Euromed Survey 2010: 6.4

Higher education and research, Euro-Mediterranean University in Slovenia and Fez
- Euromed Survey 2009: 6.62
- Euromed Survey 2010: 6.57

Mediterranean Business Development Initiative focusing on micro, small- and medium-sized enterprises
- Euromed Survey 2009: 6.4
- Euromed Survey 2010: 6.57

Euromed Survey 2010: How do you evaluate the potential contribution to the achievements of the overall Euro-Mediterranean objectives?

Euromed Survey 2009: How do you assess the possible contribution of the regional projects selected at the July 2008 Paris Summit of the Union for the Mediterranean to the achievement of the objectives of the EMP?
Importance for Euromed objectives: The UfM projects: **De-pollution of the Mediterranean Sea** (average on a scale of 0-10)

Mediterranean Partner Countries
- EU-27: 8.05
- Survey mean: 8
- Maghreb: 7.88
- Mashreq: 7.86
- Mediterranean EU Countries: 8
- Rest of EU: 8.1
- European non EU: 8.93

Europe Union (EU-27)
- Mediterranean EU Countries: 8
- Rest of EU: 8.05
- Survey mean: 8

Importance for Euromed objectives: The UfM projects: **De-pollution of the Mediterranean Sea** (%)

- Very high importance: 80%
- High importance: 9%
- Moderate importance: 19%
- Low importance: 1%
- No importance: 0%

Importance for Euromed objectives: The UfM projects: **De-pollution of the Mediterranean Sea** (average on a scale of 0-10)
Importance for Euromed objectives: The UfM projects: **Maritime and land highways** (%)

- **Turkey**: 6.8, 7.93
- **Israel**: 5.5, 8.58
- **Mashreq**: 5.7, 7.59
- **Maghreb**: 5.1, 7.22
- **Mediterranean EU Countries**: 5.77, 8.30
- **Rest of EU**: 6.29, 8.29
- **EU-27**: 6.34, 8.46
- **Survey mean**: 7.46

Importance for Euromed objectives: The UfM projects: **Maritime and land highways** (average on a scale of 0-10)

- **Turkey**: 6.8, 7.93
- **Israel**: 5.5, 8.58
- **Mashreq**: 5.7, 7.59
- **Maghreb**: 5.1, 7.22
- **Mediterranean EU Countries**: 5.77, 8.30
- **Rest of EU**: 6.29, 8.29
- **EU-27**: 6.34, 8.46
- **Survey mean**: 7.46

Importance for Euromed objectives: The UfM projects: **Maritime and land highways** (average on a scale of 0-10)

- **Mediterranean Partner Countries**: 7.46
- **EU-27**: 7.48
- **Survey mean**: 7.46
- **Maghreb**: 7.59
- **Mashreq**: 7.32
- **Mediterranean EU Countries**: 8
- **Rest of EU**: 8.1
- **European non EU**: 8.93
Importance for Euromed objectives of the UfM projects: Civil protection initiatives to combat natural and man-made disasters (average on a scale of 0-10)

Mediterranean Partner Countries
- EU-27
- Survey mean
- Maghreb
- Mashreq
- Mediterranean EU Countries
- Rest of EU
- European non EU

Rest of EU: 7.84
EU-27: 7.68
Survey mean: 7.75
Maghreb: 7.77
Mashreq: 7.78
Mediterranean EU Countries: 7.73
European non EU: 8.86

Importance for Euromed objectives of the UfM projects: Civil protection initiatives to combat natural and man-made disasters (%)

Don't know
Very high importance
9
8
7
6
5
4
3
2
1
No importance

0% 1% 2% 3% 4% 5% 6% 7% 8% 9% 10%

0% 1% 2% 3% 4% 5% 6% 7% 8% 9% 10%

0% 1% 2% 3% 4% 5% 6% 7% 8% 9% 10%

EUromed Survey 2010
EUromed Survey 2009
Importance for Euromed objectives of the UfM projects: **Alternative energies: Mediterranean Solar Plan**

(average on a scale of 0-10)

![Bar chart showing the importance of Mediterranean Solar Plan across different regions and groups.](chart.png)

**Mediterranean Partner Countries**
- EU-27: 8.14
- Survey mean: 8.21
- Maghreb: 8.29
- Mashreq: 8.3
- Mediterranean EU Countries: 8
- Rest of EU: 8.31
- European non-EU: 9.23

**Importance for Euromed objectives of the UfM projects: Alternative energies: Mediterranean Solar Plan (%)**

![Pie chart showing the importance of Mediterranean Solar Plan across different regions and groups.](chart.png)

**Don't know**: 10%
- Very high importance: 8.33%
- High importance: 8.27%
- Moderate importance: 8.21%
- Low importance: 8.14%
- No importance: 8.1%

**Importance for Euromed objectives of the UfM projects: Alternative energies: Mediterranean Solar Plan (average on a scale of 0-10)**

![Bar chart showing the importance of Mediterranean Solar Plan across different regions and groups.](chart.png)

**Mediterranean Partner Countries**
- EU-27: 8.14
- Survey mean: 8.21
- Maghreb: 8.29
- Mashreq: 8.3
- Mediterranean EU Countries: 8
- Rest of EU: 8.31
- European non-EU: 9.23
Importance for Euromed objectives of the UfM projects: Higher education and research, Euro-Mediterranean University in Slovenia and Fez (average on a scale of 0-10)

- Mediterranean Partner Countries
  - EU-27: 8.02
  - Survey mean: 7.86
  - Maghreb: 8.06
  - Mashreq: 8.02
  - Mediterranean EU Countries: 7.71
  - Rest of EU: 7.77
  - European non EU: 7.79

Importance for Euromed objectives of the UfM projects: Higher education and research, Euro-Mediterranean University in Slovenia and Fez (%)

- Very high importance
  - EU-27: 26%
  - Survey mean: 20%
  - Maghreb: 19%
  - Mashreq: 2%
- Very low importance
  - EU-27: 0%
  - Survey mean: 8%
  - Maghreb: 1%
  - Mashreq: 1%

Importance for Euromed objectives of the UfM projects: Higher education and research, Euro-Mediterranean University in Slovenia and Fez (average on a scale of 0-10)

- Turkey: 7.22
- Israel: 6.36
- Mashreq: 6.57
- Maghreb: 8.02
- Mediterranean EU Countries: 7.71
- Rest of EU: 7.77
- EU-27: 7.74
- Survey mean: 7.86
Importance for Euromed objectives of the UfM projects: Mediterranean Business Development Initiative focusing on micro, small- and medium- sized enterprises
(average on a scale of 0-10)

Importance for Euromed objectives of the UfM projects: Mediterranean Business Development Initiative focusing on micro, small- and medium- sized enterprises (%)

Importance for Euromed objectives of the UfM projects: Mediterranean Business Development Initiative focusing on micro, small- and medium- sized enterprises (average on a scale of 0-10)
B8. Among the many other new projects proposed for the UfM, please assess them by their importance:

<table>
<thead>
<tr>
<th>Project Description</th>
<th>No importance</th>
<th>Very high importance</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euromed Arbitration Court</td>
<td>13</td>
<td>7</td>
<td>4</td>
<td>4</td>
<td>483</td>
</tr>
<tr>
<td>Mediterranean Investment Guarantee Convention</td>
<td>3</td>
<td>5</td>
<td>6</td>
<td>1</td>
<td>100%</td>
</tr>
<tr>
<td>Project on Female Entrepreneurship and Strengthening Women's Participation in the Mediterranean</td>
<td>4</td>
<td>1</td>
<td>11</td>
<td>1</td>
<td>540</td>
</tr>
<tr>
<td>Mediterranean Junior Erasmus Programme</td>
<td>3</td>
<td>1</td>
<td>11</td>
<td>1</td>
<td>522</td>
</tr>
<tr>
<td>Cultural TV Channel for the Mediterranean</td>
<td>16</td>
<td>8</td>
<td>14</td>
<td>1</td>
<td>541</td>
</tr>
<tr>
<td>Mediterranean Youth Office facilitating mobility of Mediterranean students</td>
<td>2</td>
<td>2</td>
<td>10</td>
<td>1</td>
<td>552</td>
</tr>
<tr>
<td>Mediterranean Cancer Plan</td>
<td>10</td>
<td>4</td>
<td>13</td>
<td>1</td>
<td>503</td>
</tr>
<tr>
<td>Mediterranean Agency for Urban Development</td>
<td>9</td>
<td>3</td>
<td>12</td>
<td>1</td>
<td>526</td>
</tr>
<tr>
<td>Mediterranean Women's Foundation</td>
<td>11</td>
<td>3</td>
<td>17</td>
<td>1</td>
<td>531</td>
</tr>
</tbody>
</table>

* Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

** Total number of respondents including “Don’t know” answers

Assessment of the importance other of new projects proposed for the UfM (average on a scale of 0-10)
Importance of the new projects proposed for the UfM: **Euro-Mediterranean Arbitration Court**
(average on a scale of 0-10)

- Mediterranean Partner Countries: 6.32
- EU-27: 6.21
- Survey mean: 6.26
- Maghreb: 6.2
- Mashreq: 6.56
- Mediterranean EU Countries: 6.29
- Rest of EU: 5.92
- European non EU: 6.11

Importance of the new projects proposed for the UfM: **Euro-Mediterranean Arbitration Court** (%)

- Don't know: 19%
- Very high importance:
  - 10: 9%
  - 9: 7%
  - 8: 14%
  - 7: 17%
  - 6: 17%
  - 5: 20%
  - 4: 5%
  - 3: 4%
  - 2: 3%
  - 1: 1%
  - No importance: 3%

Importance of the new projects proposed for the UfM: **Mediterranean Investment Guarantee Convention**
(average on a scale of 0-10)
Importance of the new projects proposed for the UfM: *Mediterranean Investment Guarantee Convention* (%)

![Bar chart showing importance ratings for the Mediterranean Investment Guarantee Convention project.]

Importance of the new projects proposed for the UfM: *Project on Female Entrepreneurship and Strengthening Women’s Participation in Public Life in the Mediterranean* (average on a scale of 0-10)

![Bar chart showing average ratings for the Project on Female Entrepreneurship and Strengthening Women’s Participation in Public Life in the Mediterranean across different regions.]

Importance of the new projects proposed for the UfM: *Project on Female Entrepreneurship and Strengthening Women’s Participation in Public Life in the Mediterranean* (%)
Importance of the new projects proposed for the UfM: Mediterranean Junior Erasmus Programme
(average on a scale of 0-10)

Importance of the new projects proposed for the UfM: Mediterranean Junior Erasmus Programme (%)
Importance of the new projects proposed for the UfM: **Cultural TV Channel for the Mediterranean** (%)

- Don't know: 9.5%
- Very high importance: 15%
- High importance: 15.3%
- Moderate importance: 15.7%
- Low importance: 13.7%
- No importance: 3%

Importance of the new projects proposed for the UfM: **Mediterranean Youth Office facilitating mobility of Mediterranean students** (average on a scale of 0-10)

- Mediterranean Partner Countries: 8.13
- EU-27: 7.79
- Survey mean: 7.94
- Maghreb: 8.31
- Mashreq: 8.15
- Mediterranean EU Countries: 7.13
- Rest of EU: 7.86
- European non EU: 7.64

Importance of the new projects proposed for the UfM: **Mediterranean Youth Office facilitating mobility of Mediterranean students** (%)
Importance of the new projects proposed for the UfM: Mediterranean Cancer Plan
(average on a scale of 0-10)

- Mediterranean Partner Countries
  - EU-27: 6.29
  - Survey mean: 6.69
  - Maghreb: 7.73
  - Mashreq: 7.73
  - Mediterranean EU Countries: 6.5
  - Rest of EU: 5.99
  - European non EU: 7.33

Importance of the new projects proposed for the UfM: Mediterranean Cancer Plan (%)
- Don’t know: 16%
- Very high importance: 19%
- High importance: 11%
- Medium importance: 17%
- Low importance: 13%
- Very low importance: 15%
- No importance: 5%

Importance of the new projects proposed for the UfM: Mediterranean Agency for Urban Development
(average on a scale of 0-10)

- Mediterranean Partner Countries
  - EU-27: 6.72
  - Survey mean: 7.2
  - Maghreb: 7.67
  - Mashreq: 7.86
  - Mediterranean EU Countries: 6.36
  - Rest of EU: 6.41
  - European non EU: 7
Importance of the new projects proposed for the UfM: **Mediterranean Agency for Urban Development** (%)

<table>
<thead>
<tr>
<th>Importance Score</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>12%</td>
</tr>
<tr>
<td>9</td>
<td>16%</td>
</tr>
<tr>
<td>8</td>
<td>16%</td>
</tr>
<tr>
<td>7</td>
<td>16%</td>
</tr>
<tr>
<td>6</td>
<td>15%</td>
</tr>
<tr>
<td>5</td>
<td>9%</td>
</tr>
<tr>
<td>4</td>
<td>4%</td>
</tr>
<tr>
<td>3</td>
<td>2%</td>
</tr>
<tr>
<td>2</td>
<td>2%</td>
</tr>
<tr>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>0</td>
<td>2%</td>
</tr>
</tbody>
</table>

Importance of the new projects proposed for the UfM: **Mediterranean Women’s Foundation**

*Average on a scale of 0-10*

- Mediterranean Partner Countries: 7.48
- EU-27: 6.45
- Survey mean: 7.16
- Maghreb: 7.24
- Mashreq: 7.35
- Mediterranean EU Countries: 6.76
- Rest of EU: 6.98
- European non EU: 7.14

Importance of the new projects proposed for the UfM: **Mediterranean Women’s Foundation** (%)

<table>
<thead>
<tr>
<th>Importance Score</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>18%</td>
</tr>
<tr>
<td>9</td>
<td>15%</td>
</tr>
<tr>
<td>8</td>
<td>13%</td>
</tr>
<tr>
<td>7</td>
<td>12%</td>
</tr>
<tr>
<td>6</td>
<td>11%</td>
</tr>
<tr>
<td>5</td>
<td>4%</td>
</tr>
<tr>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>0</td>
<td>1%</td>
</tr>
</tbody>
</table>
**Eastern Partnership**

B9. In your opinion, how will the Eastern Partnership launched in March 2009 between the EU and six Eastern European States (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine) affect the development of Euro-Mediterranean relations?

<table>
<thead>
<tr>
<th></th>
<th>Very negative impact</th>
<th>Very positive impact</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern Partnership</td>
<td>0  1  2  3  4  5  6</td>
<td>0  1  2  3  4  5  6</td>
<td>476</td>
</tr>
<tr>
<td>and</td>
<td>9 11 20 46 63 136 69</td>
<td>8 9 10</td>
<td></td>
</tr>
<tr>
<td>Euro-Mediterranean</td>
<td>2% 2% 4% 10% 13% 29%</td>
<td>6% 4% 3%</td>
<td></td>
</tr>
<tr>
<td>relations</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

**Impact of Eastern Partnership between the EU and six Eastern European States on the development of Euro-Mediterranean relations**

(average on a scale of 0-10)

- Mediterranean Partner Countries: 5.05
- EU-27: 5.42
- Survey mean: 5.25
- Maghreb: 4.29
- Mashreq: 5.17
- Mediterranean EU Countries: 5.15
- Rest of EU: 5.75
- European non EU: 6.55

**Impact of Eastern Partnership between the EU and six Eastern European States on the development of Euro-Mediterranean relations (%)**

- Very positive impact: 3% 4% 6% 12% 16% 20%
- Very negative impact: 2% 2%
**European External Action Service**

B10. In your opinion, how will the future European External Action Service affect the Euro-Mediterranean relations?

<table>
<thead>
<tr>
<th>Impact of the future European External Action Service on the Euro-Mediterranean relations</th>
<th>Very negative impact</th>
<th>Very positive impact</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>European External Action Service and Euro-Mediterranean relations</td>
<td>2</td>
<td>2</td>
<td>6.5</td>
</tr>
<tr>
<td>Survey mean</td>
<td>2</td>
<td>2</td>
<td>6.5</td>
</tr>
<tr>
<td>Maghreb</td>
<td>3</td>
<td>1</td>
<td>4.31</td>
</tr>
<tr>
<td>Mashreq</td>
<td>2</td>
<td>2</td>
<td>4.31</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>2</td>
<td>2</td>
<td>6.26</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>2</td>
<td>2</td>
<td>6.66</td>
</tr>
<tr>
<td>European non EU</td>
<td>4</td>
<td>3</td>
<td>7.38</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers
**EU Financial Perspectives 2014-2020**

B11. Within the framework of the new EU Financial Perspectives 2014-2020 to be negotiated in 2011, how would you assess the need for a review of the current financial instruments and modalities (regardless of the amount allocated) for Euro-Mediterranean cooperation (European Neighbourhood and Partnership Instrument and FEMIP)?

<table>
<thead>
<tr>
<th>EU Financial Perspectives 2014-2020 and Euro-Mediterranean relations</th>
<th>Very negative impact</th>
<th>Very positive impact</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>8%</td>
</tr>
</tbody>
</table>

(1) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

Need for a review of the current financial instruments and modalities (regardless of the amount allocated) for Euro-Mediterranean cooperation (European Neighbourhood and Partnership Instrument and FEMIP)

(average on a scale of 0-10)

**Mediterranean Partner Countries**

<table>
<thead>
<tr>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.2</td>
<td>7.96</td>
<td>8.88</td>
<td>8.25</td>
<td>8.13</td>
<td>7.52</td>
<td>8.17</td>
<td>8.58</td>
</tr>
</tbody>
</table>

Need for a review of the current financial instruments and modalities (regardless of the amount allocated) for Euro-Mediterranean cooperation (European Neighbourhood and Partnership Instrument and FEMIP) (%)
**EU Financial Perspectives 2014-2020**

B12. Please attribute a level of priority and a level of probability to each of the following new financial instruments which could eventually be implemented in the Mediterranean

<table>
<thead>
<tr>
<th>Priority</th>
<th>Less priority</th>
<th>More priority</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0  1  2  3  4  5  6  7  8  9  10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mediterranean Macroregion (such as the Baltic Strategy or the upcoming Danube Macroregion)</td>
<td>10 14 18 16 47 76 72 65 53 37 33</td>
<td></td>
<td>441</td>
<td>157</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>2% 3% 4% 4% 11% 17% 16% 15% 12% 8% 7%</td>
<td></td>
<td>100%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Mechanisms for participation of the MPCs in the EU’s Structural Funds or similar financial instruments</td>
<td>5 8 9 11 23 70 77 89 77 57 45</td>
<td></td>
<td>471</td>
<td>127</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>1% 2% 2% 2% 5% 15% 16% 19% 16% 12% 10%</td>
<td></td>
<td>100%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>A major new Regional Programme within the ENPI to finance multilateral projects and Euro-Mediterranean relations</td>
<td>5 5 7 15 41 59 74 99 81 102</td>
<td></td>
<td>493</td>
<td>105</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>1% 1% 1% 1% 3% 8% 12% 15% 20% 16% 21%</td>
<td></td>
<td>100%</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Probability</th>
<th>Less probability</th>
<th>More probability</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0  1  2  3  4  5  6  7  8  9  10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mediterranean Macroregion (such as the Baltic Strategy or the upcoming Danube Macroregion)</td>
<td>6 15 26 47 53 103 53 45 32 17 15</td>
<td></td>
<td>412</td>
<td>186</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>1% 4% 6% 11% 13% 25% 13% 11% 8% 4% 4%</td>
<td></td>
<td>100%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Mechanisms for participation of the MPCs in the EU’s Structural Funds or similar financial instruments</td>
<td>7 22 36 32 52 89 72 53 47 18 16</td>
<td></td>
<td>444</td>
<td>154</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>2% 5% 8% 7% 12% 20% 16% 12% 11% 4% 4%</td>
<td></td>
<td>100%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>A major new Regional Programme within the ENPI to finance multilateral projects and Euro-Mediterranean relations</td>
<td>7 11 25 31 40 77 80 62 50 35 41</td>
<td></td>
<td>459</td>
<td>139</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>2% 2% 5% 7% 9% 17% 17% 14% 11% 8% 9%</td>
<td></td>
<td>100%</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(***) Total number of respondents including “Don’t know” answers

Level of priority and level of probability for new financial instruments which could eventually be implemented in the Mediterranean (average on a scale of 0-10)

![Graph showing priority and probability levels](image-url)
Level of priority and a level of probability for new financial instruments which could eventually be implemented in the Mediterranean:

**Mediterranean Macroregion (%)**

- Don’t know: 26%
- More 10: 4% (Priority), 0% (Probability)
- More 9: 4% (Priority), 0% (Probability)
- More 8: 8% (Priority), 0% (Probability)
- More 7: 8% (Priority), 0% (Probability)
- More 6: 12% (Priority), 15% (Probability)
- More 5: 13% (Priority), 19% (Probability)
- More 4: 15% (Priority), 25% (Probability)
- More 3: 16% (Priority), 20% (Probability)
- More 2: 17% (Priority), 21% (Probability)
- More 1: 18% (Priority), 26% (Probability)
- Less 0: 19% (Priority), 29% (Probability)

**Mechanisms for participation of the MPCs in the EU’s Structural Funds or similar financial instruments (%)**

- Don’t know: 26%
- More 10: 4% (Priority), 0% (Probability)
- More 9: 4% (Priority), 0% (Probability)
- More 8: 8% (Priority), 0% (Probability)
- More 7: 8% (Priority), 0% (Probability)
- More 6: 12% (Priority), 16% (Probability)
- More 5: 16% (Priority), 19% (Probability)
- More 4: 12% (Priority), 20% (Probability)
- More 3: 12% (Priority), 21% (Probability)
- More 2: 14% (Priority), 23% (Probability)
- More 1: 16% (Priority), 25% (Probability)
- Less 0: 18% (Priority), 29% (Probability)

**A major new Regional Programme within the ENPI to finance multilateral projects (%)**

- Don’t know: 29%
- More 10: 0% (Priority), 5% (Probability)
- More 9: 0% (Priority), 5% (Probability)
- More 8: 5% (Priority), 11% (Probability)
- More 7: 11% (Priority), 16% (Probability)
- More 6: 16% (Priority), 20% (Probability)
- More 5: 17% (Priority), 20% (Probability)
- More 4: 17% (Priority), 20% (Probability)
- More 3: 15% (Priority), 20% (Probability)
- More 2: 14% (Priority), 20% (Probability)
- More 1: 11% (Priority), 20% (Probability)
- Less 0: 10% (Priority), 20% (Probability)
**EU Financial Perspectives 2014-2020**

B13. How do you assess the probabilities of the new Financial Perspectives increasing substantially (i.e., more than 30%) the available funds for EU-Mediterranean Partner Countries’ financial cooperation (i.e., the financial envelope for the ENPI-South)?

<table>
<thead>
<tr>
<th>New Financial Perspectives</th>
<th>No probability</th>
<th>Very high probability</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0  1  2  3  4  5  6  7  8  9  10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Probability of new Financial Perspectives increasing substantially (i.e., more than 30%) the available funds for EU-Mediterranean Partner Countries’ financial cooperation (i.e., the financial envelope for the ENPI-South) (average on a scale of 0-10)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mediterranean Partner Countries</td>
<td>4.72</td>
<td>5.02</td>
<td>5.73</td>
<td>4.15</td>
<td>4.17</td>
</tr>
<tr>
<td>EU-27</td>
<td>4.16</td>
<td>4.72</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Survey mean</td>
<td></td>
<td>5.02</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maghreb</td>
<td>4.15</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mashreq</td>
<td>4.17</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rest of EU</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>European non EU</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Probability of new Financial Perspectives increasing substantially (i.e., more than 30%) the available funds for EU-Mediterranean Partner Countries’ financial cooperation (i.e., the financial envelope for the ENPI-South) (%)

Don't know 26%

Very high probability

<table>
<thead>
<tr>
<th>10</th>
<th>9</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
<td>8%</td>
<td>12%</td>
<td>15%</td>
<td>16%</td>
<td>17%</td>
<td>11%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>
### UfM Projects

**B14.** What degree of probability do you attribute to the following potential mid-to long-term hypotheses in the Mediterranean under the present level and framework of cooperation?

<table>
<thead>
<tr>
<th>Hypothesis</th>
<th>No probability</th>
<th>Very high probability</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Arab-Israeli conflict will paralyse the EMP</td>
<td>12</td>
<td>8</td>
<td>573</td>
<td>25</td>
<td>598</td>
</tr>
<tr>
<td>Political regimes in MPCs will show a high degree of continuity</td>
<td>2</td>
<td>3</td>
<td>560</td>
<td>38</td>
<td>598</td>
</tr>
<tr>
<td>The current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period</td>
<td>3</td>
<td>4</td>
<td>583</td>
<td>15</td>
<td>598</td>
</tr>
<tr>
<td>Gulf Cooperation Council members will facilitate a higher degree of South-South economic cooperation in the Mediterranean</td>
<td>13</td>
<td>17</td>
<td>546</td>
<td>52</td>
<td>598</td>
</tr>
<tr>
<td>Environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States</td>
<td>2</td>
<td>6</td>
<td>568</td>
<td>30</td>
<td>598</td>
</tr>
<tr>
<td>Water scarcity will become a source of conflicts and social tensions in the Mediterranean</td>
<td>3</td>
<td>10</td>
<td>578</td>
<td>20</td>
<td>598</td>
</tr>
<tr>
<td>Women will increasingly participate in the economic, social and political life of MPCs</td>
<td>3</td>
<td>8</td>
<td>583</td>
<td>15</td>
<td>598</td>
</tr>
<tr>
<td>MPCs will sustain the increased level of economic growth achieved in the last three years and, in the long term, converge to EU levels of income</td>
<td>11</td>
<td>14</td>
<td>551</td>
<td>47</td>
<td>598</td>
</tr>
<tr>
<td>Population and employment pressures in MPCs will intensify and create dramatic social tensions</td>
<td>1</td>
<td>3</td>
<td>577</td>
<td>21</td>
<td>598</td>
</tr>
<tr>
<td>Irregular migration from originating MPCs to Europe will continue to increase whatever control mechanisms the EU may impose</td>
<td>2</td>
<td>5</td>
<td>577</td>
<td>21</td>
<td>598</td>
</tr>
<tr>
<td>Free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean</td>
<td>14</td>
<td>16</td>
<td>578</td>
<td>20</td>
<td>598</td>
</tr>
<tr>
<td>Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe</td>
<td>4</td>
<td>4</td>
<td>577</td>
<td>21</td>
<td>598</td>
</tr>
<tr>
<td>The increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity</td>
<td>16</td>
<td>16</td>
<td>562</td>
<td>36</td>
<td>598</td>
</tr>
<tr>
<td>Increased level of migration will push for political reforms in the Mediterranean Partner Countries</td>
<td>29</td>
<td>34</td>
<td>573</td>
<td>25</td>
<td>598</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean under the present level and framework of cooperation
(average on a scale of 0-10)

- The Arab-Israeli conflict will paralyse the EMP
- Political regimes in MPCs will show a high degree of continuity
- The current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period
- Gulf Cooperation Council members will facilitate a higher degree of South-South economic cooperation in the Mediterranean
- Environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States
- Water scarcity will become a source of conflicts and social tensions in the Mediterranean
- Women will increasingly participate in the economic, social and political life of MPCs
- MPCs will sustain the increased level of economic growth achieved in the last three years and, in the long term, converge to EU levels of income
- Population and employment pressures in MPCs will intensify and create dramatic social tensions
- Irregular migration from originating MPCs to Europe will continue to increase whatever control mechanisms the EU may impose
- Free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean
- Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe
- The increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity
- Increased level of migration will push for political reforms in the Mediterranean Partner Countries
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: The Arab-Israeli conflict will paralyse the EMP (average on a scale of 0-10)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: The Arab-Israeli conflict will paralyse the EMP (%)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: The Arab-Israeli conflict will paralyse the EMP (average on a scale of 0-10)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Political regimes in MPCs will show a high degree of continuity (average on a scale of 0-10)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Political regimes in MPCs will show a high degree of continuity (%)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Political regimes in MPCs will show a high degree of continuity (average on a scale of 0-10)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **The current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period**

(average on a scale of 0-10)

![Bar chart showing the degree of probability attributed to the hypotheses across different regions.](image)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **The current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period (%)**

![Bar chart showing the percentage probability attributed to the hypotheses across different regions.](image)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **The current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period**

(average on a scale of 0-10)

![Bar chart showing the degree of probability attributed to the hypotheses across different regions.](image)
Degree of probability attributed to the following potential mid-to long-term hypotheses in the Mediterranean: **GCC members will facilitate a higher degree of South-South economic cooperation in the Mediterranean** (average on a scale of 0-10)

![Bar chart showing degree of probability for different regions and groups.](image)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **GCC members will facilitate a higher degree of South-South economic cooperation in the Mediterranean (%)**

![Bar chart showing distribution of responses.](image)

Degree of probability attributed to the following potential mid-to long-term hypotheses in the Mediterranean: **GCC members will facilitate a higher degree of South-South economic cooperation in the Mediterranean** (average on a scale of 0-10)

![Bar chart showing degree of probability for different regions and groups.](image)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States (average on a scale of 0-10)

- Mediterranean Partner Countries
  - EU-27: 6.69
  - Survey mean: 6.41
  - Maghreb: 6.69
  - Mashreq: 6.85
  - Mediterranean EU Countries: 6.2
  - Rest of EU: 6.66
  - European non EU: 6.25

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States (%)

- Don’t know
- Very high probability
  - 10: 3%
  - 9: 3%
  - 8: 7%
  - 7: 11%
  - 6: 17%
  - 5: 17%
  - 4: 12%
  - 3: 13%
  - 2: 13%
  - 1: 7%
- No probability
  - 0: 1%

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States (average on a scale of 0-10)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Water scarcity will become a source of conflicts and social tensions in the Mediterranean** (average on a scale of 0-10)

- Mediterranean Partner Countries: 7.59
- EU-27: 7.38
- Survey mean: 7.47
- Maghreb: 7.47
- Mashreq: 8.13
- Mediterranean EU Countries: 7.23
- Rest of EU: 7.55
- European non EU: 7.2

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Water scarcity will become a source of conflicts and social tensions in the Mediterranean (%)**

- **Very high probability**: 21% Euromed Survey 2010, 25% Euromed Survey 2009
- **High probability**: 14% Euromed Survey 2010, 7% Euromed Survey 2009
- **Moderate probability**: 15% Euromed Survey 2010, 16% Euromed Survey 2009
- **Low probability**: 14% Euromed Survey 2010, 11% Euromed Survey 2009
- **Very low probability**: 11% Euromed Survey 2010, 7% Euromed Survey 2009
- **Don't know**: 2% Euromed Survey 2010, 2% Euromed Survey 2009
- **No probability**: 0% Euromed Survey 2010, 1% Euromed Survey 2009
Degree of probability attributed to the following potential mid-to long-term hypotheses in the Mediterranean: **Women will increasingly participate in the economic, social and political life of MPCs**
(average on a scale of 0-10)

- Mediterranean Partner Countries
  - EU-27: 6.04
  - Survey mean: 6.66
  - Maghreb: 6.70
  - Mashreq: 7.24
  - Mediterranean EU Countries: 6.2
  - Rest of EU: 6.47
  - European non EU: 5.27

- Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Women will increasingly participate in the economic, social and political life of MPCs** (%)

  - Very high probability: 10
  - Don't know: 9%
  - No probability: 10%
  - Other ratings

- Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Women will increasingly participate in the economic, social and political life of MPCs**
(average on a scale of 0-10)

  - Turkey: 5.1
  - Israel: 4.04
  - Mashreq: 6.06
  - Maghreb: 5.12
  - Mediterranean EU Countries: 6.2
  - Rest of EU: 5.79
  - EU-27: 5.84
  - Survey mean: 5.89
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **MPCs will sustain the increased level of economic growth achieved in the last three years and, in the long term, converge to EU levels of income** (average on a scale of 0-10)

- **Mediterranean Partner Countries**
  - EU-27: 4.92
  - Survey mean: 5.24
  - Maghreb: 5.27
  - Mashreq: 5.93
  - Mediterranean EU Countries: 4.37
  - Rest of EU: 4.86
  - European non EU: 5.31

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **MPCs will sustain the increased level of economic growth achieved in the last three years and, in the long term, converge to EU levels of income (%)**

- **Don't know**
  - Euromed Survey 2010: 2%
  - Euromed Survey 2009: 3%
- **Very high probability**
  - Euromed Survey 2010: 1%
  - Euromed Survey 2009: 4%
- **High probability**
  - Euromed Survey 2010: 2%
  - Euromed Survey 2009: 9%
- **Medium high probability**
  - Euromed Survey 2010: 3%
  - Euromed Survey 2009: 9%
- **Medium probability**
  - Euromed Survey 2010: 11%
  - Euromed Survey 2009: 12%
- **Very low probability**
  - Euromed Survey 2010: 12%
  - Euromed Survey 2009: 20%
- **Low probability**
  - Euromed Survey 2010: 4%
  - Euromed Survey 2009: 21%

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **MPCs will sustain the increased level of economic growth achieved in the last three years and, in the long term, converge to EU levels of income** (average on a scale of 0-10)

- **Turkey**
  - Euromed Survey 2010: 5.04
  - Euromed Survey 2009: 5.94
- **Israel**
  - Euromed Survey 2010: 5.17
  - Euromed Survey 2009: 5.93
- **Mashreq**
  - Euromed Survey 2010: 4.13
  - Euromed Survey 2009: 5.83
- **Maghreb**
  - Euromed Survey 2010: 4.34
  - Euromed Survey 2009: 4.07
- **Mediterranean EU Countries**
  - Euromed Survey 2010: 4.56
  - Euromed Survey 2009: 4.85
- **Rest of EU**
  - Euromed Survey 2010: 4.40
  - Euromed Survey 2009: 4.92
- **EU-27**
  - Euromed Survey 2010: 4.48
  - Euromed Survey 2009: 5.24
- **Survey mean**
  - Euromed Survey 2010: 4.17
  - Euromed Survey 2009: 5.24
Degree of probability attributed to the following potential mid-to-long-term hypotheses in the Mediterranean: Population and employment pressures in MPCs will intensify and create dramatic social tensions (average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Mediterranean Partner Countries</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU-27</td>
<td>6.93</td>
<td>7.07</td>
<td>7.04</td>
<td>7.07</td>
<td>7.06</td>
<td>6.72</td>
</tr>
<tr>
<td>Survey mean</td>
<td>7.19</td>
<td>7.27</td>
<td>7.19</td>
<td>6.83</td>
<td>7.05</td>
<td>6.83</td>
</tr>
<tr>
<td>Maghreb</td>
<td>6.19</td>
<td>7.27</td>
<td>7.19</td>
<td>6.83</td>
<td>7.05</td>
<td>6.72</td>
</tr>
<tr>
<td>Mashreq</td>
<td>6.04</td>
<td>7.07</td>
<td>7.04</td>
<td>7.07</td>
<td>7.06</td>
<td>6.72</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>6.19</td>
<td>7.27</td>
<td>7.19</td>
<td>6.83</td>
<td>7.05</td>
<td>6.83</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>6.04</td>
<td>7.07</td>
<td>7.04</td>
<td>7.07</td>
<td>7.06</td>
<td>6.72</td>
</tr>
<tr>
<td>European non EU</td>
<td>6.19</td>
<td>7.27</td>
<td>7.19</td>
<td>6.83</td>
<td>7.05</td>
<td>6.83</td>
</tr>
</tbody>
</table>

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Population and employment pressures in MPCs will intensify and create dramatic social tensions (%)

- Very high probability: 10%
- High probability: 9%
- Medium probability: 8%
- Low probability: 7%
- No probability: 6%
- Very low probability: 5%
- Very very low probability: 4%
- Don't know: 3%
- No response: 2%
- No answer: 1%
- No probability: 0%

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Population and employment pressures in MPCs will intensify and create dramatic social tensions (average on a scale of 0-10)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Irregular migration from MPCs to Europe will continue to increase whatever control mechanisms the EU may impose** (average on a scale of 0-10)

![Bar chart showing the degree of probability for various regions and years.](chart)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Irregular migration from MPCs to Europe will continue to increase whatever control mechanisms the EU may impose (%)**

![Bar chart showing the percentage of respondents in different categories.](chart)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Irregular migration from MPCs to Europe will continue to increase whatever control mechanisms the EU may impose** (average on a scale of 0-10)

![Bar chart showing the degree of probability for various regions and years.](chart)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean** (average on a scale of 0-10)

- Mediterranean Partner Countries
  - EU-27: 6.09
  - Survey mean: 6.19
  - Maghreb: 6.85
  - Mashreq: 6.85
- Mediterranean EU Countries: 5.23
- Rest of EU: 5.50
- European non EU: 6.2

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean** (%)

- Very high probability: 10%
- High probability: 9%
- Medium probability: 8%
- Low probability: 7%
- Very low probability: 6%
- No probability: 5%
- Don't know: 3%

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: **Free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean** (average on a scale of 0-10)

- Turkey: 6.61
- Israel: 5.76
- Mashreq: 6.86
- Maghreb: 7.19
- Mediterranean EU Countries: 6.23
- Rest of EU: 5.52
- EU-27: 5.36
- Survey mean: 6.09

**IEMed.**
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: "Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe" (average on a scale of 0-10)

![Bar chart showing degree of probability by region.](chart1)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: "Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe" (%)

![Bar chart showing degree of probability by region.](chart2)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: "Increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe" (average on a scale of 0-10)

![Bar chart showing degree of probability by region.](chart3)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: The increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity (average on a scale of 0-10)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: The increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity (%)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: The increased level of migration, economic and human exchanges will give way to the emergence of a common Mediterranean identity (average on a scale of 0-10)
Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Increased level of migration will push for political reforms in the Mediterranean Partner Countries
(average on a scale of 0-10)

Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean: Increased level of migration will push for political reforms in the Mediterranean Partner Countries (%)

Set of Results
B15. How would you assess the contribution of the current Euro-Mediterranean economic and financial cooperation (including Euromed Free Trade Area 2010, sectoral cooperation and ENPI) to real convergence of income levels (measured in GDP per capita) across the Mediterranean?

Assessment of the contribution current of the Euro-Mediterranean economic and financial cooperation (including Euromed Free Trade Area 2010, sectoral cooperation and ENPI) to real convergence of income levels (measured in GDP per capita) across the Mediterranean (average on a scale of 0-10)

Assessment of the contribution of the current Euro-Mediterranean economic and financial cooperation (including Euromed Free Trade Area 2010, sectoral cooperation and ENPI) to real convergence of income levels (measured in GDP per capita) across the Mediterranean (%)

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers
BLOCK C

THE EURO-MEDITERRANEAN FREE TRADE AREA (EMFTA) IN 2010 AND BEYOND, AND THE ECONOMIC AND FINANCIAL COOPERATION
**General Economic Context**

C1. What degree of probability do you attribute to the following scenarios about the impact of the global economic crisis on the Euro-Mediterranean Partnership?

<table>
<thead>
<tr>
<th>Scenario</th>
<th>No importance</th>
<th>Very high importance</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>A negative long-term impact, as it will permanently reduce the ability of the EU to mobilise and make available resources for Euro-Mediterranean cooperation</td>
<td>0% 1% 3% 5% 11% 18% 18% 17% 15% 8% 4% 100%</td>
<td>93 82 42 24</td>
<td>538</td>
<td>44</td>
<td>582</td>
</tr>
<tr>
<td>A negative long-term impact, as it will intensify the social tensions in Europe and hence the resistance to cooperation with Southern Mediterranean Countries</td>
<td>1% 1% 3% 5% 11% 17% 16% 19% 16% 8% 5% 100%</td>
<td>0% 1% 3% 5% 11% 13% 17% 17% 20% 11% 7% 100%</td>
<td>542</td>
<td>40</td>
<td>582</td>
</tr>
<tr>
<td>A negative long-term impact, as it will highlight the focus of the EU to resolve its own economic problems without integrating the MPCs in its economic strategies</td>
<td>1% 3% 6% 8% 15% 20% 18% 12% 9% 4% 3% 100%</td>
<td>2% 6% 13% 20% 19% 17% 12% 8% 3% 100%</td>
<td>539</td>
<td>43</td>
<td>582</td>
</tr>
<tr>
<td>A positive long-term impact, as it will highlight the need for more Euro-Mediterranean cooperation and for joint strategies across the Mediterranean</td>
<td>1% 3% 6% 8% 15% 20% 18% 12% 9% 4% 3% 100%</td>
<td>2% 6% 13% 20% 19% 17% 12% 8% 3% 100%</td>
<td>539</td>
<td>43</td>
<td>582</td>
</tr>
<tr>
<td>A positive long-term impact, as EU companies will face market contraction in Europe and the need to reduce costs by investing and looking for new markets in Mediterranean Partner Countries</td>
<td>1% 2% 3% 6% 8% 20% 19% 17% 12% 8% 3% 100%</td>
<td>2% 6% 13% 20% 19% 17% 12% 8% 3% 100%</td>
<td>536</td>
<td>46</td>
<td>582</td>
</tr>
<tr>
<td>A positive long-term impact, as it will reinforce the need for the EU to integrate its near neighbourhood, including the Mediterranean, into its economic area</td>
<td>2% 2% 5% 7% 9% 18% 18% 14% 12% 8% 4% 100%</td>
<td>2% 6% 13% 20% 19% 17% 12% 8% 3% 100%</td>
<td>538</td>
<td>44</td>
<td>582</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

---

**Degree of probability of the following scenarios about the impact of the global economic crisis on the Euro-Mediterranean Partnership (average on a scale of 0-10)**

- A negative long-term impact, as it will permanently reduce the ability of the EU to mobilise and make available resources for Euro-Mediterranean cooperation: 6.16
- A negative long-term impact, as it will intensify the social tensions in Europe and hence the resistance to cooperation with Southern Mediterranean Countries: 6.18
- A negative long-term impact, as it will highlight the focus of the EU to resolve its own economic problems without integrating the MPCs in its economic strategies: 6.63
- A positive long-term impact, as it will highlight the need for more Euro-Mediterranean cooperation and for joint strategies across the Mediterranean: 5.34
- A positive long-term impact, as EU companies will face market contraction in Europe and the need to reduce costs by investing and looking for new markets in Mediterranean Partner Countries: 5.93
- A positive long-term impact, as it will reinforce the need for the EU to integrate its near neighbourhood, including the Mediterranean, into its economic area: 5.74
Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A negative long-term impact, as it will permanently reduce the ability of the EU to mobilise and make available resources for Euro-Mediterranean cooperation (average on a scale of 0-10)

Mediterranean Partner Countries
EU-27: 6.17
Survey mean: 6.16
Maghreb: 6.38
Mashreq: 6.22
Mediterranean EU Countries: 6.2
Rest of EU: 6.13
European non EU: 4.69

Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A negative long-term impact, as it will intensify the social tensions in Europe and hence the resistance to cooperation with Southern Mediterranean Countries (%)

Don’t know: 8%
Very high probability: 10
9
8: 15%
7: 17%
6: 18%
5: 18%
4: 11%
3: 9%
2: 3%
1: 1%
No probability: 0%

Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A negative long-term impact, as it will intensify the social tensions in Europe and hence the resistance to cooperation with Southern Mediterranean Countries (average on a scale of 0-10)

Mediterranean Partner Countries
EU-27: 4.02
Survey mean: 6.34
Maghreb: 6.18
Mashreq: 6.17
Mediterranean EU Countries: 6.23
Rest of EU: 6.48
European non EU: 5.08
Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A negative long-term impact, as it will intensify the social tensions in Europe and hence the resistance to cooperation with Southern Mediterranean Countries (%)

Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A negative long-term impact, as it will highlight the focus of the EU to resolve its own economic problems without integrating the MPCs in its economic strategies (average on a scale of 0-10)

Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A negative long-term impact, as it will highlight the focus of the EU to resolve its own economic problems without integrating the MPCs in its economic strategies (%)
Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A positive long-term impact, as it will highlight the need for more Euro-Mediterranean cooperation and for joint strategies across the Mediterranean
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
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</thead>
<tbody>
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<td>5.69</td>
<td>5.31</td>
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<td>6.23</td>
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</table>

Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A positive long-term impact, as EU companies will face market contraction in Europe and the need to reduce costs by investing and looking for new markets in MPCs
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
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<th>European non EU</th>
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<td>6.23</td>
<td>6.25</td>
<td>5.71</td>
<td>5.86</td>
<td>6.46</td>
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</table>
Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A positive long-term impact, as EU companies will face market contraction in Europe and the need to reduce costs by investing and looking for new markets in MPCs (%)

Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A positive long-term impact, as it will reinforce the need for the EU to integrate its near neighbourhood, including the Mediterranean, into its economic area (average on a scale of 0-10)

Degree of probability of the following scenario about the impact of the global economic crisis on the Euro-Mediterranean Partnership: A positive long-term impact, as it will reinforce the need for the EU to integrate its near neighbourhood, including the Mediterranean, into its economic area (%)
C2. How would you grade the added value of regional economic integration in the Mediterranean (in particular through the creation of the Euro-Mediterranean Free Trade Area) in relation to the general process of globalisation and global trade liberalisation?

<table>
<thead>
<tr>
<th>Added value of regional economic integration in the Mediterranean</th>
<th>No added value</th>
<th>Very high added value</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
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<td>Total*</td>
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<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>9%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

Grading the added value of regional economic integration in the Mediterranean (in particular through the creation of the Euro-Mediterranean Free Trade Area) in relation to the general process of globalisation and global trade liberalisation

(average on a scale of 0-10)

Grading the added value of regional economic integration in the Mediterranean (in particular through the creation of the Euro-Mediterranean Free Trade Area) in relation to the general process of globalisation and global trade liberalisation (%)

<table>
<thead>
<tr>
<th>No added value</th>
<th>Very high added value</th>
<th>Total</th>
</tr>
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<tbody>
<tr>
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</table>
C3. How would you assess the probability that the external economic actors, such as the United States, China, the Gulf countries or others, will gradually displace the prominent economic role of the EU in the Mediterranean?

Assessment of the probability that the external economic actors, such as the United States, China, the Gulf countries or others, will gradually displace the prominent economic role of the EU in the Mediterranean (average on a scale of 0-10)

Assessment of the probability that the external economic actors, such as the United States, China, the Gulf countries or others, will gradually displace the prominent economic role of the EU in the Mediterranean (%)
### General Assessment of EMFTA 2010 (1995-2010)

**C4. How would you assess the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries?**

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<tr>
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<th>Dkn</th>
<th>Total**</th>
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<td>7%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

---

**Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries**

(average on a scale of 0-10)

![Assessment Diagram](image-url)
Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**EMFTA in general**
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
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<tbody>
<tr>
<td>Score</td>
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<td>4.88</td>
<td>4.71</td>
<td>5.12</td>
<td>4.88</td>
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Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**EMFTA in general (%)**

<table>
<thead>
<tr>
<th>Don’t know</th>
<th>Very disappointing</th>
<th>Very disappointing</th>
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<tbody>
<tr>
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<td>2%</td>
<td>9%</td>
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<tr>
<td>14%</td>
<td>34%</td>
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Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**ALGERIA**
(average on a scale of 0-10)
Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**ALGERIA (%)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Very positive</td>
<td>2%</td>
</tr>
<tr>
<td>Don’t know</td>
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Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**EGYPT**

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
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<tr>
<td>Egyptian respondents</td>
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<td>Mashreq</td>
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<tr>
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<tr>
<td>Rest of EU</td>
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<tr>
<td>European non EU</td>
<td>3.33</td>
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Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**EGYPT (%)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
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<td>Very disappointing</td>
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IEMed.
Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**ISRAEL**
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Israeli respondents</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
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<th>Mediterranean EU Countries</th>
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Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**ISRAEL (%)**

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Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**JORDAN**
(average on a scale of 0-10)

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Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**JORDAN (%)**

<table>
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<tr>
<th>Assessment</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t know</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3%</td>
</tr>
<tr>
<td>Very positive</td>
<td>4</td>
<td>4%</td>
<td>7%</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
<td>12%</td>
<td>8%</td>
<td>10</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>0</td>
<td>4%</td>
<td>4%</td>
<td>7%</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
<td>12%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**JORDAN (%)**

<table>
<thead>
<tr>
<th>Score</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>1%</td>
</tr>
<tr>
<td>9</td>
<td>4%</td>
</tr>
<tr>
<td>8</td>
<td>9%</td>
</tr>
<tr>
<td>7</td>
<td>19%</td>
</tr>
<tr>
<td>6</td>
<td>21%</td>
</tr>
<tr>
<td>5</td>
<td>23%</td>
</tr>
<tr>
<td>4</td>
<td>9%</td>
</tr>
<tr>
<td>3</td>
<td>6%</td>
</tr>
<tr>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Don't know</td>
<td>40%</td>
</tr>
</tbody>
</table>

**LEBANON**

(Average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Score</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lebanese respondents</td>
<td>7.25</td>
<td></td>
</tr>
<tr>
<td>Mediterranean Partner Countries</td>
<td>5.55</td>
<td></td>
</tr>
<tr>
<td>EU-27</td>
<td>5.34</td>
<td></td>
</tr>
<tr>
<td>Survey mean</td>
<td>5.45</td>
<td></td>
</tr>
<tr>
<td>Maghreb</td>
<td>5.38</td>
<td></td>
</tr>
<tr>
<td>Mashreq</td>
<td>5.85</td>
<td></td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>5.20</td>
<td></td>
</tr>
<tr>
<td>Rest of EU</td>
<td>5.53</td>
<td></td>
</tr>
<tr>
<td>European non EU</td>
<td>4.25</td>
<td></td>
</tr>
</tbody>
</table>

Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**LEBANON (%)**

<table>
<thead>
<tr>
<th>Score</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>2%</td>
</tr>
<tr>
<td>9</td>
<td>4%</td>
</tr>
<tr>
<td>8</td>
<td>9%</td>
</tr>
<tr>
<td>7</td>
<td>12%</td>
</tr>
<tr>
<td>6</td>
<td>24%</td>
</tr>
<tr>
<td>5</td>
<td>23%</td>
</tr>
<tr>
<td>4</td>
<td>11%</td>
</tr>
<tr>
<td>3</td>
<td>8%</td>
</tr>
<tr>
<td>2</td>
<td>4%</td>
</tr>
<tr>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Don't know</td>
<td>41%</td>
</tr>
</tbody>
</table>

IEMed.
Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**MOROCCO**
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th></th>
<th>Moroccan respondents</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4.2</td>
<td>6.42</td>
<td>5.29</td>
<td>6.35</td>
<td>5.31</td>
<td>6.81</td>
<td>5.31</td>
<td>6.31</td>
<td>6.26</td>
</tr>
</tbody>
</table>

Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**MOROCCO (%)**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Very positive</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>Very disappointing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>0</td>
<td>36.5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3.5%</td>
</tr>
</tbody>
</table>

Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**OCCUPIED PALESTINIAN TERRITORY**
(average on a scale of 0-10)

<table>
<thead>
<tr>
<th></th>
<th>Palestinian respondents</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4.55</td>
<td>4.17</td>
<td>4.18</td>
<td>4.12</td>
<td>3.55</td>
<td>4.64</td>
<td>4.16</td>
<td>4.21</td>
<td>1</td>
</tr>
</tbody>
</table>
Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**OCCUPIED PALESTINIAN TERRITORY (%)**

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very disappointing</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>39.1%</td>
</tr>
<tr>
<td>1</td>
<td>4.2%</td>
</tr>
<tr>
<td>2</td>
<td>3.9%</td>
</tr>
<tr>
<td>3</td>
<td>3.1%</td>
</tr>
<tr>
<td>4</td>
<td>8%</td>
</tr>
<tr>
<td>5</td>
<td>11.4%</td>
</tr>
<tr>
<td>6</td>
<td>11.4%</td>
</tr>
<tr>
<td>7</td>
<td>12%</td>
</tr>
<tr>
<td>8</td>
<td>16.5%</td>
</tr>
<tr>
<td>9</td>
<td>17.4%</td>
</tr>
<tr>
<td>10</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**TUNISIA**

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Group</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tunisian respondents</td>
<td>6.23</td>
</tr>
<tr>
<td>Mediterranean Partner Countries</td>
<td>6.46</td>
</tr>
<tr>
<td>EU-27</td>
<td>6.26</td>
</tr>
<tr>
<td>Survey mean</td>
<td>6.34</td>
</tr>
<tr>
<td>Maghreb</td>
<td>6.34</td>
</tr>
<tr>
<td>Mashreq</td>
<td>6.87</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>6.32</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>6.17</td>
</tr>
<tr>
<td>European non EU</td>
<td>4.8</td>
</tr>
</tbody>
</table>

Assessment of the progress of the implementation of the Euro-Mediterranean Free Trade Areas between the EU and its Mediterranean Partner Countries:

**TUNISIA (%)**

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very disappointing</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>38%</td>
</tr>
<tr>
<td>1</td>
<td>0.8%</td>
</tr>
<tr>
<td>2</td>
<td>2%</td>
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<tr>
<td>3</td>
<td>3.9%</td>
</tr>
<tr>
<td>4</td>
<td>5.6%</td>
</tr>
<tr>
<td>5</td>
<td>15.1%</td>
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<tr>
<td>6</td>
<td>21.3%</td>
</tr>
<tr>
<td>7</td>
<td>16.5%</td>
</tr>
<tr>
<td>8</td>
<td>15.7%</td>
</tr>
<tr>
<td>9</td>
<td>11.8%</td>
</tr>
<tr>
<td>10</td>
<td>4.2%</td>
</tr>
</tbody>
</table>

C5. Do you have a good knowledge or a clear perception of the impact of the Euro-Mediterranean Free Trade Area and the EU-Turkey Customs Union?

<table>
<thead>
<tr>
<th>Impact of the EMFTA and the EU-Turkey Customs Union</th>
<th>Yes</th>
<th>No</th>
<th>No answer</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>161</td>
<td>414</td>
<td>23</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>26.9%</td>
<td>69.2%</td>
<td>3.8%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Knowledge or a clear perception of the impact of the Euro-Mediterranean Free Trade Area and the EU-Turkey Customs Union (%)

- **Turkey**: Yes 68.8%, No 31.3%, No answer 0%, Total 100%
- **Mediterranean Partner Countries**: Yes 271%, No 68.8%, No answer 4.1%, Total 100%
- **EU-27**: Yes 26%, No 70.3%, No answer 3.7%, Total 100%
- **Survey mean**: Yes 29.6%, No 69.2%, No answer 3.8%, Total 100%
- **Maghreb**: Yes 32.2%, No 63.6%, No answer 4.2%, Total 100%
- **Mashreq**: Yes 13.4%, No 82.1%, No answer 4.5%, Total 100%
- **Mediterranean EU Countries**: Yes 33.8%, No 63.8%, No answer 2.5%, Total 100%
- **Rest of EU**: Yes 15.9%, No 77.9%, No answer 5.1%, Total 100%
- **European non EU**: Yes 13.3%, No 73.3%, No answer 13.3%, Total 100%
Knowledge or a clear perception of the impact of the Euro-Mediterranean Free Trade Area and the EU-Turkey Customs Union: MPC respondents by country (%)


C5.1. How would you assess the impact of the Euro-Mediterranean Free Trade Areas in the economies of the Mediterranean Partner Countries in terms of growth and competitiveness, social impact, impact on Small- and Medium-Sized Enterprises and fiscal impact

<table>
<thead>
<tr>
<th>Impact on growth, competitiveness and Foreign Direct Investment</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the MPCs</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
<td>147</td>
<td>13 160</td>
</tr>
<tr>
<td>In your own country</td>
<td></td>
<td></td>
<td></td>
<td>65</td>
<td>8 73</td>
</tr>
<tr>
<td>Only for MPC nationals</td>
<td>3% 3% 5% 5% 12% 22% 11% 9% 14% 15% 2</td>
<td></td>
<td></td>
<td>66</td>
<td>7 73</td>
</tr>
</tbody>
</table>

Impact on employment and social impact

<table>
<thead>
<tr>
<th>Impact on employment and social impact</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the MPCs</td>
<td>2 6 3 5 10 43 38 15 15 6 1</td>
<td></td>
<td></td>
<td>144</td>
<td>16 160</td>
</tr>
<tr>
<td>In your own country</td>
<td></td>
<td></td>
<td></td>
<td>65</td>
<td>7 73</td>
</tr>
<tr>
<td>Only for MPC nationals</td>
<td>5% 2% 6% 9% 18% 23% 11% 9% 8% 6% 5%</td>
<td></td>
<td></td>
<td>66</td>
<td>7 73</td>
</tr>
</tbody>
</table>

Impact on local Small-and Medium-Sized Enterprises

<table>
<thead>
<tr>
<th>Impact on local Small-and Medium-Sized Enterprises</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the MPCs</td>
<td>2 4 4 13 31 36 28 17 8 1</td>
<td></td>
<td></td>
<td>148</td>
<td>12 160</td>
</tr>
<tr>
<td>In your own country</td>
<td></td>
<td></td>
<td></td>
<td>65</td>
<td>8 73</td>
</tr>
<tr>
<td>Only for MPC nationals</td>
<td>2% 3% 8% 6% 12% 22% 14% 11% 6% 12% 5%</td>
<td></td>
<td></td>
<td>66</td>
<td>8 73</td>
</tr>
</tbody>
</table>

Fiscal impact (impact on State revenues)

<table>
<thead>
<tr>
<th>Fiscal impact (impact on State revenues)</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the MPCs</td>
<td>3 5 3 7 21 45 25 10 12 6 2</td>
<td></td>
<td></td>
<td>139</td>
<td>21 160</td>
</tr>
<tr>
<td>In your own country</td>
<td></td>
<td></td>
<td></td>
<td>63</td>
<td>10 73</td>
</tr>
<tr>
<td>Only for MPC nationals</td>
<td>3% 5% 6% 13% 14% 24% 10% 6% 11% 5% 3%</td>
<td></td>
<td></td>
<td>66</td>
<td>11%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

*Nationals of Algeria, Egypt, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey in their own country.
Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of:
(average on a scale of 0-10)

Impact on growth, competitiveness and Foreign Direct Investment

Impact on employment and social impact

Impact on local Small- and Medium-Sized Enterprises

Fiscal impact (impact on State revenues)

Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: Impact on growth, competitiveness and Foreign Direct Investment
(average on a scale of 0-10)
Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: Impact on growth, competitiveness and Foreign Direct Investment (%)

Your own country

In the MPCs

Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: Impact on employment and social impact (average on a scale of 0-10)

* Nationals of Algeria, Egypt, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey in their own country.
Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: **Impact on employment and social impact (%)**

Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: **Impact on local Small- and Medium-Sized Enterprises** (average on a scale of 0-10)

* Nationals of Algeria, Egypt, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey in their own country.
Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: Impact on local Small- and Medium-Sized Enterprises (%) 

Don’t know

Very positive

Very negative

Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: Fiscal impact (impact on State revenues) (average on a scale of 0-10) 

* Nationals of Algeria, Egypt, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey in their own country.
Assessment of the impact of the EMFTA in the economies of the Mediterranean Partner Countries in terms of: Fiscal impact (impact on State revenues) (%)

**EU-Turkey Customs Union**

C5.2. How would you assess the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy?

<table>
<thead>
<tr>
<th>No probability</th>
<th>Very high probability</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact on growth, competitiveness and Foreign Direct Investment</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Impact on employment and social impact in the Mashreq</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Impact on local Small- and Medium-Sized Enterprises</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Fiscal impact (impact on State revenues)</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy (average on a scale of 0-10)
Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on growth, competitiveness and Foreign Direct Investment (average on a scale of 0-10)

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on growth, competitiveness and Foreign Direct Investment (%)

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on growth, competitiveness and Foreign Direct Investment. TURKISH respondents (%)

IEMed.
Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on employment and social impact (average on a scale of 0-10)

- Turkish respondents: 6.44
- Mediterranean Partner Countries: 6.43
- EU-27: 6.48
- Survey mean: 6.43
- Maghreb: 6.33
- Mashreq: 6.55
- Mediterranean EU Countries: 6.62
- Rest of EU: 6.4
- European non EU: 4.5

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on employment and social impact (%)

- Very positive: 26%
- Don’t know: 9%
- Very disappointing: 0%

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on employment and social impact. TURKISH respondents (%)

- Very positive: 98%
- Don’t know: 5%
- Very disappointing: 0%
Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on local Small- and Medium-Sized Enterprises (average on a scale of 0-10)

- **Turkish respondents**: 6.64
- **Mediterranean Partner Countries**: 5.53
- **EU-27**: 6.68
- **Survey mean**: 6.61
- **Maghreb**: 6.67
- **Mashreq**: 6.09
- **Mediterranean EU Countries**: 6.83
- **Rest of EU**: 6.52
- **European non EU**: 6.09

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on local Small- and Medium-Sized Enterprises (%)

- **Very positive**: 25%
- **Very disappointing**: 0%
- **Don't know**: 9%

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy: Impact on local Small- and Medium-Sized Enterprises. TURKISH respondents (%)

- **Very positive**: 23%
- **Very disappointing**: 0%
- **Don't know**: 5%
Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy:

**Fiscal impact (impact on State revenues)**

(average on a scale of 0-10)

| Category                        | Fiscal Impact
|---------------------------------|-----------------
| Turkish respondents             | 5.99
| Mediterranean Partner Countries | 5.11
| EU-27                           | 6.27
| Maghreb                         | 6.2
| Mashreq                         | 6.19
| Mediterranean EU Countries      | 6.27
| Rest of EU                      | 6.28
| European non EU                 | 5.5

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy:

**Fiscal impact (impact on State revenues)** (%

<table>
<thead>
<tr>
<th>Category</th>
<th>Fiscal Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very positive</td>
<td>14%</td>
</tr>
<tr>
<td>don't know</td>
<td>5%</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>0%</td>
</tr>
</tbody>
</table>

Assessment of the impact of the EU-Turkey Customs Union (established in 1996) on the Turkish economy:

**Fiscal impact (impact on State revenues)** for TURKISH respondents (%

<table>
<thead>
<tr>
<th>Category</th>
<th>Fiscal Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very positive</td>
<td>14%</td>
</tr>
<tr>
<td>don't know</td>
<td>5%</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>0%</td>
</tr>
</tbody>
</table>
**EU-Turkey Customs Union**

C5.3. To what extent do the bilateral free trade agreements concluded between Turkey and the MPCs contribute to the establishment of the Euro-Mediterranean Free Trade Area?

<table>
<thead>
<tr>
<th>No contribution</th>
<th>Very positive contribution</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

To what extent the bilateral free trade agreements concluded between Turkey and the MPCs contribute to the establishment of the Euro-Mediterranean Free Trade Area

(average on a scale of 0-10)

- **Turkish respondents:** 7.29
- **Mediterranean Partner Countries:** 6.92
- **EU-27:** 6.41
- **Survey mean:** 6.64
- **Maghreb:** 6.94
- **Mashreq:** 6.79
- **Mediterranean EU Countries:** 6.33
- **Rest of EU:** 6.59
- **European non EU:** 3.5

IEMed.
To what extent the bilateral free trade agreements concluded between Turkey and the MPCs contribute to the establishment of the Euro-Mediterranean Free Trade Area (%)

Don't know 10
Very positive contribution 9
Very positive contribution 8
Very positive contribution 7
Very positive contribution 6
Very positive contribution 5
Very positive contribution 4
Very positive contribution 3
Very positive contribution 2
Very positive contribution 1
No contribution 0

To what extent the bilateral free trade agreements concluded between Turkey and the MPCs contribute to the establishment of the Euro-Mediterranean Free Trade Area. TURKISH respondents (%)

Don't know 10
Very positive contribution 9
Very positive contribution 8
Very positive contribution 7
Very positive contribution 6
Very positive contribution 5
Very positive contribution 4
Very positive contribution 3
Very positive contribution 2
Very positive contribution 1
No contribution 0
### South-South Integration and Rules of Origin

**C6. How would you assess progress in the implementation of South-South free trade areas in the Mediterranean?**

<table>
<thead>
<tr>
<th></th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agadir Agreement (2007, Morocco,</td>
<td>9</td>
<td></td>
<td>385</td>
<td>188</td>
<td>573</td>
</tr>
<tr>
<td>Tunisia, Egypt and Jordan)</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Arab Free Trade Agreement</td>
<td>21</td>
<td></td>
<td>402</td>
<td>171</td>
<td>573</td>
</tr>
<tr>
<td>(League of Arab States)</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agadir Agreement (2007, Morocco,</td>
<td>47</td>
<td></td>
<td>384</td>
<td>189</td>
<td>573</td>
</tr>
<tr>
<td>Tunisia, Egypt and Jordan)</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

**Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean**

**(average on a scale of 0-10)**

**Agadir Agreement (2007, Morocco, Tunisia, Egypt and Jordan)**

**General Arab Free Trade Agreement (League of Arab States)**

**Arab Maghreb Union**

**Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: Agadir Agreement (2007, Morocco, Tunisia, Egypt and Jordan)**

**(average on a scale of 0-10)**

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tunisian respondents</td>
<td>4.44</td>
</tr>
<tr>
<td>Moroccan respondents</td>
<td>5.19</td>
</tr>
<tr>
<td>Jordan respondents</td>
<td>3.91</td>
</tr>
<tr>
<td>Egyptian respondents</td>
<td>4.84</td>
</tr>
<tr>
<td>Mashreq</td>
<td>3.69</td>
</tr>
<tr>
<td>Maghreb</td>
<td>4.69</td>
</tr>
<tr>
<td>Mediterranean Partner Countries</td>
<td>4.79</td>
</tr>
<tr>
<td>Survey mean</td>
<td>4.72</td>
</tr>
<tr>
<td>EU-27</td>
<td>5.66</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>4.58</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>4.77</td>
</tr>
<tr>
<td>European non EU</td>
<td>3.33</td>
</tr>
</tbody>
</table>
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: Agadir Agreement (2007, Morocco, Tunisia, Egypt and Jordan) (%)
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **Agadir Agreement** (2007, Morocco, Tunisia, Egypt and Jordan). **TUNISIAN respondents (%)**

- **Very positive**: 10%  
- **Very disappointing**: 0%

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **Agadir Agreement** (2007, Morocco, Tunisia, Egypt and Jordan). **EGYPTIAN respondents (%)**

- **Very positive**: 38%  
- **Very disappointing**: 0%

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **Agadir Agreement** (2007, Morocco, Tunisia, Egypt and Jordan). **JORDAN respondents (%)**

- **Very positive**: 27%  
- **Very disappointing**: 0%
The Euro-Mediterranean Free Trade Area (EMFTA) in 2010 and Beyond...

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **General Arab Free Trade Agreement (League of Arab States)**

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Libyan respondents</td>
<td>6</td>
</tr>
<tr>
<td>Mauritanian respondents</td>
<td>4.93</td>
</tr>
<tr>
<td>Lebanese respondents</td>
<td>4.07</td>
</tr>
<tr>
<td>Occupied Palestinian respondents</td>
<td>3.99</td>
</tr>
<tr>
<td>Syrian respondents</td>
<td>4.58</td>
</tr>
<tr>
<td>Tunisian respondents</td>
<td>3.91</td>
</tr>
<tr>
<td>Moroccan respondents</td>
<td>4.83</td>
</tr>
<tr>
<td>Jordan respondents</td>
<td>4.42</td>
</tr>
<tr>
<td>Egyptian respondents</td>
<td>3.47</td>
</tr>
<tr>
<td>Algerian respondents</td>
<td>4.53</td>
</tr>
<tr>
<td>Mashreq</td>
<td>3.58</td>
</tr>
<tr>
<td>Maghreb</td>
<td>4.22</td>
</tr>
<tr>
<td>Mediterranean Partner Countries</td>
<td>4.22</td>
</tr>
<tr>
<td>Survey mean</td>
<td>4.22</td>
</tr>
<tr>
<td>EU-27</td>
<td>4.23</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>3.15</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>4.35</td>
</tr>
<tr>
<td>European non EU</td>
<td>5.6</td>
</tr>
</tbody>
</table>

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **General Arab Free Trade Agreement (League of Arab States)** (%)

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very disappointing</td>
<td>5.2%</td>
</tr>
<tr>
<td>1</td>
<td>9%</td>
</tr>
<tr>
<td>2</td>
<td>10%</td>
</tr>
<tr>
<td>3</td>
<td>14%</td>
</tr>
<tr>
<td>4</td>
<td>15%</td>
</tr>
<tr>
<td>5</td>
<td>18%</td>
</tr>
<tr>
<td>6</td>
<td>9%</td>
</tr>
<tr>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>8</td>
<td>6%</td>
</tr>
<tr>
<td>9</td>
<td>1%</td>
</tr>
<tr>
<td>10</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>30%</td>
</tr>
</tbody>
</table>
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: General Arab Free Trade Agreement (League of Arab States). EGYPTIAN respondents (%)

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: General Arab Free Trade Agreement (League of Arab States). TUNISIAN respondents (%)

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: General Arab Free Trade Agreement (League of Arab States). ALGERIAN respondents (%)
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **General Arab Free Trade Agreement (League of Arab States).**

**MOROCCAN respondents (%)**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very positive</td>
<td>3%</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>3%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
</tr>
</tbody>
</table>

**LEBANESE respondents (%)**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very positive</td>
<td>23%</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>9%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>14%</td>
</tr>
</tbody>
</table>

**SYRIAN respondents (%)**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very positive</td>
<td>17%</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>25%</td>
</tr>
</tbody>
</table>
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **General Arab Free Trade Agreement (League of Arab States).** JORDAN respondents (%)

- Don't know: 8%
- Very positive: 17%
- Very disappointing: 29%

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **General Arab Free Trade Agreement (League of Arab States).** OCCUPIED PALESTINIAN TERRITORY respondents (%)

- Don't know: 29%
- Very positive: 13%
- Very disappointing: 0%

Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: **Arab Maghreb Union** (average on a scale of 0-10)

- Tunisian respondents: 3.9
- Moroccan respondents: 4.7
- Algerian respondents: 2
- Mauritania respondents: 3.8
- Libyan respondents: 7
- Mashreq: 4.5
- Maghreb: 2.62
- Mediterranean Partner Countries: 3.59
- Survey mean: 3.58
- EU-27: 3.58
- Mediterranean EU Countries: 3.99
- Rest of EU: 3.91
- European non EU: 5.5
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: Arab Maghreb Union (%)

- Don’t know: 33%
- Very disappointing: 0%
- Very positive: 6%
- Don’t know: 3%
- Very disappointing: 25%
- Very positive: 2%
- Don’t know: 3%
- Very disappointing: 31%
- Very positive: 3%
- Don’t know: 31%
Assessment of the progress in the implementation of South-South free trade areas in the Mediterranean: Arab Maghreb Union. MOROCCAN respondents (%)

South-South Integration and Rules of Origin

C7. Do you have a good knowledge or a clear perception of the effectiveness of the System of Pan-Euro-Mediterranean Rules of Origin?

<table>
<thead>
<tr>
<th>Impact of the EMFTA and the EU-Turkey Customs Union</th>
<th>Yes</th>
<th>No</th>
<th>No answer</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of the EMFTA and the EU-Turkey Customs Union</td>
<td>114</td>
<td>459</td>
<td>25</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>19.1%</td>
<td>76.8%</td>
<td>4.2%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Knowledge or a clear perception of the effectiveness of the System of Pan-Euro-Mediterranean Rules of Origin (%)

- Mediterranean Partner Countries: 22% Yes, 73.6% No, 4.4% No answer
- EU-27: 15.2% Yes, 79.7% No, 4.1% No answer
- Survey mean: 19.1% Yes, 76.8% No, 4.2% No answer
- Maghreb: 23.7% Yes, 72% No, 4.2% No answer
- Mashreq: 24.1% Yes, 70.5% No, 5.4% No answer
- Mediterranean EU Countries: 20.6% Yes, 76.9% No, 2.5% No answer
- Rest of EU: 11% Yes, 83.1% No, 5.9% No answer
- European non EU: 20% Yes, 66.7% No, 13.3% No answer
Knowledge or a clear perception of the impact of the Euro-Mediterranean Free Trade Area and the EU-Turkey Customs Union. MPC respondents by country (%)

- Algeria: 22% Yes, 70% No, 75% No answer
- Egypt: 25.6% Yes, 71.2% No, 2.6% No answer
- Israel: 11.1% Yes, 88.9% No, 0% No answer
- Jordan: 37.5% Yes, 43.8% No, 18.8% No answer
- Lebanon: 22.2% Yes, 77.8% No, 0% No answer
- Morocco: 20.4% Yes, 74.4% No, 5.1% No answer
- Occupied Palestinian Territory: 13% Yes, 78.3% No, 8.7% No answer
- Syria: 25% Yes, 75% No, 0% No answer
- Tunisia: 31.3% Yes, 68.6% No, 0% No answer
How would you explain the low use of the System of Pan-Euro-Mediterranean Rules of Origin? (mark the two most relevant reasons)

<table>
<thead>
<tr>
<th>Reason</th>
<th>First Option</th>
<th>Second Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of knowledge by trade operators</td>
<td>47 (41.6%)</td>
<td>17 (15%)</td>
</tr>
<tr>
<td>It is an overly complex system</td>
<td>32 (28.3%)</td>
<td>29 (25.7%)</td>
</tr>
<tr>
<td>Administrative costs of applying the Pan-Euro-Mediterranean rules of origin are too high</td>
<td>9 (8%)</td>
<td>21 (18.6%)</td>
</tr>
<tr>
<td>The current system is not well adapted and developed</td>
<td>14 (12.4%)</td>
<td>23 (20.4%)</td>
</tr>
<tr>
<td>Lack of compatibility with other systems of rules of origin</td>
<td>11 (9.7%)</td>
<td>23 (20.4%)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>113 (100%)</td>
<td>113 (100%)</td>
</tr>
</tbody>
</table>

How would you explain the low use of the System of Pan-Euro-Mediterranean Rules of Origin? (% chosen as FIRST option)

Lack of knowledge by trade operators: 41.6%
It is an overly complex system: 28.3%
Administrative costs of applying the Pan-Euro-Mediterranean rules of origin are too high: 8%
The current system is not well adapted and developed: 12.4%
Lack of compatibility with other systems of rules of origin: 9.7%

How would you explain the low use of the System of Pan-Euro-Mediterranean Rules of Origin? (% chosen as SECOND option)

Lack of knowledge by trade operators: 15.0%
It is an overly complex system: 26.7%
Administrative costs of applying the Pan-Euro-Mediterranean rules of origin are too high: 18.6%
The current system is not well adapted and developed: 20.4%
Lack of compatibility with other systems of rules of origin: 20.4%
How would you explain the low use of the System of Pan-Euro-Mediterranean Rules of Origin?
(% chosen as FIRST option, by area of specialisation)

- Lack of knowledge by trade operators: 48.60%
- It is an overly complex system: 21.60%
- Administrative costs of applying the Pan-Euro-Mediterranean rules of origin are too high: 10.80%
- The current system is not well adapted and developed: 14.5%
- Lack of compatibility with other systems of rules of origin: 9.7%

How would you explain the low use of the System of Pan-Euro-Mediterranean Rules of Origin?
(% chosen as FIRST option, by kind of institution)

- Lack of knowledge by trade operators: 58.60%
- It is an overly complex system: 26.80%
- Administrative costs of applying the Pan-Euro-Mediterranean rules of origin are too high: 3.4%
- The current system is not well adapted and developed: 10.5%
- Lack of compatibility with other systems of rules of origin: 9.7%
**Services Trade Liberalisation**

C8. How would you assess the progress of on-going negotiations for services trade liberalisation between the EU and Mediterranean Partner Countries (there are negotiations with Morocco, Tunisia, Egypt and Israel)?

<table>
<thead>
<tr>
<th>Assessment</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very disappointing</td>
<td>5</td>
<td>9</td>
<td>18</td>
<td>36</td>
<td>44</td>
<td>85</td>
<td>73</td>
<td>60</td>
<td>23</td>
<td>8</td>
<td>6</td>
<td>367</td>
<td>204</td>
<td>571</td>
</tr>
<tr>
<td>Very positive</td>
<td>1%</td>
<td>2%</td>
<td>5%</td>
<td>10%</td>
<td>12%</td>
<td>23%</td>
<td>20%</td>
<td>16%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>100%</td>
<td>36%</td>
<td>**</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

Assessment of the progress of on-going negotiations for services trade liberalisation between the EU and Mediterranean Partner Countries (negotiations with Morocco, Tunisia, Egypt and Israel)
(average on a scale of 0-10)

- **Israel**: 5.75
- **Egypt**: 4.96
- **Tunisia**: 4.7
- **Morocco**: 5.47
- **Mediterranean Partner Countries**: 5.12
- **Mashreq**: 5.03
- **Maghreb**: 4.5
- **Survey mean**: 5.25
- **EU-27**: 5.41
- **Mediterranean EU Countries**: 5.35
- **Rest of EU**: 5.49
- **European non EU**: 6.29

Assessment of the progress of on-going negotiations for services trade liberalisation between the EU and Mediterranean Partner Countries (negotiations with Morocco, Tunisia, Egypt and Israel) (%)
Assessment of the progress of on-going negotiations for services trade liberalisation between the EU and Mediterranean Partner Countries (negotiations with Morocco, Tunisia, Egypt and Israel).

**ISRAELI respondents (%)**

- Don’t know: 55.6%
- Very positive: 25%
- Very disappointing: 0%

**EGYPTIAN respondents (%)**

- Don’t know: 32%
- Very positive: 28%
- Very disappointing: 4%

**TUNISIAN respondents (%)**

- Don’t know: 6%
- Very positive: 30%
- Very disappointing: 3%
Assessment of the progress of on-going negotiations for services trade liberalisation between the EU and Mediterranean Partner Countries (negotiations with Morocco, Tunisia, Egypt and Israel). **MOROCCAN respondents (%)**

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Trade liberalisation of agriculture and processed agricultural products in the Euro-Mediterranean framework</td>
<td>9</td>
<td>12</td>
<td>28</td>
<td>73</td>
</tr>
<tr>
<td>Average</td>
<td>2%</td>
<td>3%</td>
<td>7%</td>
<td>18%</td>
</tr>
</tbody>
</table>

C9. How would you assess the progress in trade liberalisation of agriculture and processed agricultural products in the Euro-Mediterranean framework?

* Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
** Total number of respondents including “Don’t know” answers

**Liberalisation of Trade in Agricultural Products**

Assessment of the progress in trade liberalisation of agriculture and processed agricultural products in the Euro-Mediterranean framework (average on a scale of 0-10)
Assessment of the progress in trade liberalisation of agriculture and processed agricultural products in the Euro-Mediterranean framework (%)

C10. Do you have a good knowledge or a clear perception of the impact of agricultural liberalisation?

<table>
<thead>
<tr>
<th>Impact of agricultural liberalisation</th>
<th>Yes</th>
<th>No</th>
<th>No answer</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>220</td>
<td>350</td>
<td>28</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>36.8%</td>
<td>58.5%</td>
<td>4.7%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Knowledge or a clear perception of the impact of agricultural liberalisation (%)
### C10.1 How do you assess the potential impact of full agricultural liberalisation on the EU Member States and MPC agricultural sectors?

<table>
<thead>
<tr>
<th></th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>On EU Member States</td>
<td>1</td>
<td>4</td>
<td>7</td>
<td>11</td>
<td>28</td>
</tr>
<tr>
<td></td>
<td>0%</td>
<td>2%</td>
<td>3%</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>On MPCs (assuming full bilateral liberalisation)</td>
<td>0</td>
<td>10</td>
<td>7</td>
<td>11</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>0%</td>
<td>5%</td>
<td>3%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>On MPCs (assuming unilateral asymmetric liberalisation by the EU)</td>
<td>3</td>
<td>7</td>
<td>5</td>
<td>12</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
<td>6%</td>
<td>8%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

### Assessment of the potential impact of full agricultural liberalisation on the EU Member States and MPC agricultural sectors (average on a scale of 0-10)

![Graph showing assessment of potential impact on EU Member States and MPCs](image)

### Assessment of the potential impact of full agricultural liberalisation: on the EU Member States (average on a scale of 0-10)

![Graph showing assessment of potential impact on EU Member States](image)
Assessment of the potential impact of full agricultural liberalisation: on the EU Member States (%) 

- Don't know: 2% 
- Very positive: 10% 
- Very disappointing: 0%

Assessment of the potential impact of full agricultural liberalisation: on MPCs (assuming full bilateral liberalisation) 

Average on a scale of 0-10 

- Mediterranean Partner Countries: 6.05 
- EU-27: 6.23 
- Survey mean: 6.11 
- Maghreb: 5.24 
- Mashreq: 6.86 
- Mediterranean EU Countries: 6.09 
- Rest of EU: 6.45 
- European non EU: 5.25

Assessment of the potential impact of full agricultural liberalisation: on MPCs (assuming full bilateral liberalisation) (%) 

- Don't know: 2% 
- Very positive: 10% 
- Very disappointing: 0%
Assessment of the potential impact of full agricultural liberalisation: on MPCs (assuming unilateral asymmetric liberalisation by the EU) (average on a scale of 0-10)

![Bar Chart]

Assessment of the potential impact of full agricultural liberalisation: on MPCs (assuming unilateral asymmetric liberalisation by the EU) (%)

![Bar Chart]
C10.2 How do you assess the probability of the EU offering to the Mediterranean Partner Countries anytime in the foreseeable future a full agricultural trade liberalisation to access the single market free of any barrier?

<table>
<thead>
<tr>
<th>Probability of the EU offering to the</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>MPCs anytime in the foreseeable future a full agricultural trade liberalisation to access the single market free of any barrier</td>
<td>7</td>
<td>17</td>
<td>26</td>
<td>29</td>
<td>26</td>
<td>32</td>
<td>26</td>
<td>27</td>
<td>16</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Total* = 215
Dkn = 5
Total** = 220

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

**Probability of the EU offering to the Mediterranean Partner Countries anytime in the foreseeable future a full agricultural trade liberalisation to access the single market free of any barrier (%)**

**Probability of the EU offering to the Mediterranean Partner Countries anytime in the foreseeable future a full agricultural trade liberalisation to access the single market free of any barrier (average on a scale of 0-10)**

- Turkish respondents: 4.94
- Mediterranean Partner Countries: 4.06
- European non EU: 4.55
- EU-27: 4.59
- Mashreq: 4.3
- Mediterranean EU Countries: 4.3
- Rest of EU: 3.87
- Maghreb: 5.29
- Survey mean: 4.55

---

The Euro-Mediterranean Free Trade Area (EMFTA) in 2010 and Beyond...
**Services Trade Liberalisation**

C11. How would you assess the added value of the new Deep and Comprehensive Free Trade Areas to be established by the EU with the Mediterranean Partner Countries (including agriculture and services as well as approximation of standards and technical legislation, in addition to conformity assessment)?

<table>
<thead>
<tr>
<th>No added value</th>
<th>Very high value</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>The new Deep and Comprehensive Free Trade Areas</td>
<td>3 1 2 13 25 52 76 108 84 48 11</td>
<td>423</td>
<td>146</td>
<td>569</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

**Assessment of the added value of the new Deep and Comprehensive Free Trade Areas to be established by the EU with the Mediterranean Partner Countries**

(average on a scale of 0-10)

- Mediterranean Partner Countries:
  - EU-27: 6.59
  - Survey mean: 6.69
  - Maghreb: 6.69
  - Mashreq: 6.91
  - Mediterranean EU Countries: 6.58
  - Rest of EU: 6.61
  - European non EU: 6.64

**Assessment of the added value of the new Deep and Comprehensive Free Trade Areas to be established by the EU with the Mediterranean Partner Countries (%)**

- Don’t know: 26%
- Very high added value:
  - 10: 3%
  - 9: 11%
  - 8: 20%
  - 7: 26%
  - 6: 18%
  - 5: 12%
  - 4: 6%
  - 3: 2%
  - 2: 0%
  - 1: 0%
- No added value: 1%
Assessment of Financial Cooperation

C12. What is your global assessment of the effectiveness of the bilateral assistance granted through the European Neighbourhood and Partnership Instrument (ENPI)?

<table>
<thead>
<tr>
<th>Effectiveness of the bilateral assistance granted through the European Neighbourhood and Partnership Instrument</th>
<th>No added value</th>
<th>Very high value</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>0%</td>
<td>1%</td>
<td>4%</td>
<td>7%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>1%</td>
<td>1%</td>
<td>4%</td>
<td>7%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>4%</td>
<td>7%</td>
<td>14%</td>
<td>17%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>14%</td>
<td>17%</td>
<td>19%</td>
<td>19%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>17%</td>
<td>19%</td>
<td>19%</td>
<td>12%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>19%</td>
<td>19%</td>
<td>12%</td>
<td>4%</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>19%</td>
<td>12%</td>
<td>4%</td>
<td>2%</td>
<td>100%</td>
<td>18%</td>
</tr>
<tr>
<td>12%</td>
<td>4%</td>
<td>2%</td>
<td>100%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>4%</td>
<td>2%</td>
<td>100%</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2%</td>
<td>100%</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18%</td>
<td>100%</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

Assessment of the effectiveness of the bilateral assistance granted through the European Neighbourhood and Partnership Instrument (average on a scale of 0-10)

Assessment of the effectiveness of the bilateral assistance granted through the European Neighbourhood and Partnership Instrument (%)
**Assessment of Financial Cooperation**

C13. How would you assess the effectiveness of direct budget support as a mechanism for EU financial aid to Mediterranean Partner Countries?

<table>
<thead>
<tr>
<th>No added value</th>
<th>Very high value</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Direct budget support as a mechanism for EU financial aid to Mediterranean Partner Countries</td>
<td>6</td>
<td>18</td>
<td>29</td>
<td>44</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

**Assessment of the effectiveness of direct budget support as a mechanism for EU financial aid to Mediterranean Partner Countries**

(average on a scale of 0-10)

- Mediterranean Partner Countries: 5.83
- EU-27: 5.9
- Survey mean: 6.43
- Maghreb: 6.4
- Mashreq: 6.24
- Mediterranean EU Countries: 5.52
- Rest of EU: 4.61
- European non EU: 6.82

**Assessment of the effectiveness of direct budget support as a mechanism for EU financial aid to Mediterranean Partner Countries (%)**

- Don’t know: 15%
- Very high added value: 3%
- No added value: 1%
BLOCK D

SECTORAL COOPERATION
### Industrial Modernisation Programmes and Industrial Cooperation


<table>
<thead>
<tr>
<th>Activity</th>
<th>Progress achieved</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.</td>
<td>188 (55%)</td>
<td>222</td>
<td>564</td>
</tr>
<tr>
<td>Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACCA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).</td>
<td>163 (52%)</td>
<td>252</td>
<td>564</td>
</tr>
<tr>
<td>Promoting innovation and technology transfer: exploiting the results of the programme “Medibikar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.</td>
<td>140 (43%)</td>
<td>237</td>
<td>564</td>
</tr>
<tr>
<td>Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.</td>
<td>174 (50%)</td>
<td>216</td>
<td>564</td>
</tr>
<tr>
<td>Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation.</td>
<td>123 (39%)</td>
<td>250</td>
<td>564</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

---

**Assessment of the progress in Euro-Mediterranean industrial cooperation in the five priority axes highlighted in the 2009-2010 Working Plan**

- Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP. (55% Progress, 42% No progress, 3% Regression, 3% Don’t know)
- Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACCA” (Agreements on Conformity Assessment and Acceptance of Industrial Products). (52% Progress, 44% No progress, 4% Regression, 4% Don’t know)
- Promoting innovation and technology transfer: exploiting the results of the programme “Medibikar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network. (43% Progress, 51% No progress, 7% Regression, 4% Don’t know)
- Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices. (50% Progress, 45% No progress, 5% Regression, 5% Don’t know)
- Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation. (39% Progress, 47% No progress, 14% Regression, 4% Don’t know)
Assessment of the progress in Euro-Mediterranean industrial cooperation in the five priority axes highlighted in the 2009-2010 Working Plan:

**Mediterranean Partner Countries**

Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.

Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACAA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).

Promoting innovation and technology transfer: exploiting the results of the programme “Mediblikar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.

Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.

Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation.

Assessment of the progress in Euro-Mediterranean industrial cooperation in the five priority axes highlighted in the 2009-2010 Working Plan:

**EU-27 countries**

Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.

Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACAA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).

Promoting innovation and technology transfer: exploiting the results of the programme “Mediblikar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.

Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.

Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation.
Assessment of the progress in Euro-Mediterranean industrial cooperation in the five priority axes highlighted in the 2009-2010 Working Plan: Maghreb

Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.

Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACAA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).

Promoting innovation and technology transfer: exploiting the results of the programme “Medibikar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.

Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.

Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation.

Assessment of the progress in Euro-Mediterranean industrial cooperation in the five priority axes highlighted in the 2009-2010 Working Plan: Mashreq

Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.

Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACAA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).

Promoting innovation and technology transfer: exploiting the results of the programme “Medibikar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.

Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.

Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation.
Assessment of the progress in Euro-Mediterranean industrial cooperation in the five priority axes highlighted in the 2009-2010 Working Plan:

**Mediterranean EU Countries**

Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.

Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACAA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).

Promoting innovation and technology transfer: exploiting the results of the programme “Mediktar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.

Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.

Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation.

**Rest of EU countries**

Improving the business environment: implementation of the Euro-Mediterranean Charter for Enterprise, promoting investment through “Invest in Med” programme and FEMIP.

Facilitation of the trade of industrial products: approximation of technical legislation and standards leading to bilateral “ACAA” (Agreements on Conformity Assessment and Acceptance of Industrial Products).

Promoting innovation and technology transfer: exploiting the results of the programme “Mediktar”, exploring the possibilities for connecting MPCs to the Enterprise Europe Network.

Promoting sustainable industrial development and energy efficiency through the exchange of information and good practices.

Dialogue on the future of the textile and clothing sector: strengthening social dialogue as well as promotion of innovation.
Industrial Modernisation Programmes and Industrial Cooperation

D2. Do you have a good knowledge or a clear perception of industrial and investment cooperation in the Mediterranean?

<table>
<thead>
<tr>
<th>Knowledge of industrial and investment cooperation in the Mediterranean</th>
<th>Yes</th>
<th>No</th>
<th>No answer</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>180</td>
<td>384</td>
<td>34</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>30.1%</td>
<td>64.2%</td>
<td>5.7%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Knowledge or a clear perception of industrial and investment cooperation in the Mediterranean (%)

![Pie chart showing the distribution of knowledge or perception levels among Mediterranean Partner Countries, EU-27, Survey mean, Maghreb, Mashreq, Mediterranean EU Countries, Rest of EU, and European non EU regions.]

Industrial Modernisation Programmes and Industrial Cooperation

D.2.1 What is your assessment of the "Invest in Med" regional programme?
Invest in Med A Euro-Mediterranean Network of organisations committed to investment promotion and trade facilitation, strengthening SME collaboration and exchange of best practices.
Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia
Timeframe: 2008-2011
Budget: €9 million

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>&quot;Invest in Med&quot; regional programme</td>
<td>2</td>
<td>16</td>
<td>23</td>
<td>24</td>
</tr>
<tr>
<td></td>
<td>1%</td>
<td>9%</td>
<td>13%</td>
<td>14%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers
Assessment of the "Invest in Med" regional programme
(average on a scale of 0-10)

- Mediterranean Partner Countries: 5.3
- EU-27: 5.56
- Survey mean: 5.4
- Maghreb: 4.72
- Mashreq: 5.84
- Mediterranean EU Countries: 5.56
- Rest of EU: 5.57
- European non EU: 5.33

Assessment of the "Invest in Med" regional programme (%)

- Very positive: 10%
- Don't know: 4%
- Very disappointing: 1%

Assessment of the "Invest in Med" regional programme countries concerned
(average on a scale of 0-10)

- Survey mean: 5.4
- Tunisia: 4.6
- Syria: 6.33
- Occupied Palestinian Territory: 6
- Algeria: 4.63
- Egypt: 5.46
- Israel: 5
- Jordan: 5.86
- Lebanon: 6
- Morocco: 4.86
**Industrial Modernisation Programmes and Industrial Cooperation**

D2.2. How would you assess the effectiveness and impact of the industrial modernisation (*mise-à-niveau*) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs?

<table>
<thead>
<tr>
<th></th>
<th>Very low</th>
<th>Very high</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lebanon (€50 mil.)</td>
<td>2 3 8 10 22 35 28 15 11 6 1 141</td>
<td></td>
<td>39 180</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jordan (EJADA, €40 mil.)</td>
<td>3 1 2 7 16 27 34 25 16 12 3 146</td>
<td></td>
<td>22% 180</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tunisia (€50 mil.)</td>
<td>0 3 2 9 18 30 24 25 13 8 1 133</td>
<td></td>
<td>34 180</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Egypt (€250 mil.)</td>
<td>2 2 7 12 21 24 18 12 8 4 0 128</td>
<td></td>
<td>19% 180</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

Assessment of the effectiveness and impact of the industrial modernisation (*mise-à-niveau*) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs

(average on a scale of 0-10)

---

Assessment of the effectiveness and impact of the industrial modernisation (*mise-à-niveau*) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs

(average on a scale of 0-10)
Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: EGYPT (€250 mil.) (average on a scale of 0-10)

- Egyptian respondents: 5.33
- Mediterranean Partner Countries: 5.16
- EU-27: 5.22
- Survey mean: 5.23
- Maghreb: 4.88
- Mashreq: 5.54
- Mediterranean EU Countries: 5.44
- Rest of EU: 4.79
- European non EU: 4.33

Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: TUNISIA (€50 mil.) (%)

- Very high: 22%
- High: 1%
- Medium high: 4%
- Medium: 8%
- Medium low: 11%
- Low: 20%
- Very low: 25%

Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: TUNISIA (€50 mil.) (average on a scale of 0-10)

- Tunisian respondents: 5.33
- Mediterranean Partner Countries: 6.00
- EU-27: 6.99
- Survey mean: 5.96
- Maghreb: 3.88
- Mashreq: 6.67
- Mediterranean EU Countries: 5.95
- Rest of EU: 6.77
- European non EU: 4.33
Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: TUNISIA (€50 mil.) (%)

Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: JORDAN (EJADA, €40 mil.) (average on a scale of 0-10)

Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: JORDAN (EJADA, €40 mil.) (%)
Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: LEBANON (€50 mil.) (average on a scale of 0-10)

- Lebanese respondents: 6.00
- Mediterranean Partner Countries: 5.12
- EU-27: 4.93
- Survey mean: 5.07
- Maghreb: 4.72
- Mashreq: 5.62
- Mediterranean EU Countries: 4.97
- Rest of EU: 4.84
- European non EU: 5.12

Assessment of the effectiveness and impact of the industrial modernisation (mise-à-niveau) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs: LEBANON (€50 mil.) (%)

- Very high: 29%
- Very high: 0%
- High: 3%
- High: 6%
- Medium-high: 6%
- Medium-high: 12%
- Medium: 18%
- Medium: 18%
- Medium-low: 9%
- Medium-low: 9%
- Very low: 2%
- Very low: 2%
## Water Sector Cooperation

D3. How would you assess the level of priority of water cooperation in the framework of the EMP/UfM?

<table>
<thead>
<tr>
<th>Very low</th>
<th>Very high</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td>4 9 23 29 34 48 49 65 77 66 472</td>
<td></td>
<td>92</td>
<td>564</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(/**) Total number of respondents including “Don’t know” answers

### Assessment of the level of priority of water cooperation in the framework of the EMP/UfM

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment score</td>
<td>6.33</td>
<td>6.67</td>
<td>5.75</td>
<td>6.87</td>
<td>6.90</td>
<td>7.17</td>
<td>7.30</td>
</tr>
</tbody>
</table>

### Assessment of the level of priority of water cooperation in the framework of the EMP/UfM (%)

<table>
<thead>
<tr>
<th>Category</th>
<th>Very high</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very high</td>
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</tr>
<tr>
<td>9</td>
<td>14%</td>
<td></td>
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<tr>
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</tr>
<tr>
<td>3</td>
<td>6%</td>
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</tr>
<tr>
<td>2</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Very low</td>
<td>0</td>
<td>1%</td>
</tr>
</tbody>
</table>

Don’t know | 16%
**D4. Please indicate the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008)**

<table>
<thead>
<tr>
<th>Priority</th>
<th>Very low</th>
<th>Very high</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptation to climate change</td>
<td>6</td>
<td>6</td>
<td>12</td>
<td>15</td>
<td>30</td>
</tr>
<tr>
<td>Balance between supply and demand</td>
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<td>2</td>
<td>11</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>Conservation and rehabilitation of natural environments</td>
<td>3</td>
<td>1</td>
<td>10</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>De-pollution of the Mediterranean</td>
<td>7</td>
<td>4</td>
<td>8</td>
<td>11</td>
<td>18</td>
</tr>
<tr>
<td>Technologies and efficient use of water</td>
<td>4</td>
<td>4</td>
<td>6</td>
<td>16</td>
<td>9</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008)

(average on a scale of 0-10)

Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008); **Adaptation to climate change**

(average on a scale of 0-10)
### Adaptation to Climate Change (%)

<table>
<thead>
<tr>
<th>Level</th>
<th>Mediterranean EU Countries</th>
<th>EU-27</th>
<th>Mediterranean Partner Countries</th>
<th>Mashreq</th>
<th>Maghreb</th>
<th>Survey mean</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very low</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
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<tr>
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<tr>
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<tr>
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<td>5%</td>
<td>5%</td>
<td>5%</td>
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<tr>
<td>4</td>
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<tr>
<td>8</td>
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<td>15%</td>
<td>15%</td>
<td>15%</td>
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<td>9</td>
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<td>17%</td>
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<td>17%</td>
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<tr>
<td>Very high</td>
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<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
</tr>
</tbody>
</table>

### Balance between Supply and Demand (average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Mediterranean EU Countries</th>
<th>EU-27</th>
<th>Mediterranean Partner Countries</th>
<th>Mashreq</th>
<th>Maghreb</th>
<th>Survey mean</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>7.45</td>
<td>7.50</td>
<td>7.22</td>
<td>7.31</td>
<td>6.88</td>
<td>7.12</td>
<td>7.68</td>
<td>7.39</td>
</tr>
<tr>
<td>EU-27</td>
<td>7.34</td>
<td>7.68</td>
<td>7.34</td>
<td>7.45</td>
<td>7.31</td>
<td>7.50</td>
<td>7.34</td>
<td>7.34</td>
</tr>
<tr>
<td>Mediterranean Partner Countries</td>
<td>7.34</td>
<td>7.45</td>
<td>7.22</td>
<td>7.31</td>
<td>6.88</td>
<td>7.12</td>
<td>7.68</td>
<td>7.39</td>
</tr>
<tr>
<td>Mashreq</td>
<td>7.45</td>
<td>7.68</td>
<td>7.34</td>
<td>7.45</td>
<td>7.31</td>
<td>7.50</td>
<td>7.34</td>
<td>7.34</td>
</tr>
<tr>
<td>Maghreb</td>
<td>7.31</td>
<td>7.68</td>
<td>7.34</td>
<td>7.45</td>
<td>7.31</td>
<td>7.50</td>
<td>7.34</td>
<td>7.34</td>
</tr>
<tr>
<td>Survey mean</td>
<td>7.12</td>
<td>7.50</td>
<td>7.22</td>
<td>7.31</td>
<td>6.88</td>
<td>7.12</td>
<td>7.68</td>
<td>7.39</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>7.34</td>
<td>7.45</td>
<td>7.22</td>
<td>7.31</td>
<td>6.88</td>
<td>7.12</td>
<td>7.68</td>
<td>7.39</td>
</tr>
<tr>
<td>European non EU</td>
<td>7.34</td>
<td>7.45</td>
<td>7.22</td>
<td>7.31</td>
<td>6.88</td>
<td>7.12</td>
<td>7.68</td>
<td>7.39</td>
</tr>
</tbody>
</table>
Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008): Conservation and rehabilitation of natural environments (average on a scale of 0-10)

- Mediterranean Partner Countries:
  - EU-27: 7.8
  - Survey mean: 7.48
  - Maghreb: 7.4
  - Mashreq: 7.4
  - Mediterranean EU Countries: 7.4
  - Rest of EU: 7.77
  - European non EU: 8.45

Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008): De-pollution of the Mediterranean (average on a scale of 0-10)

- Mediterranean Partner Countries:
  - EU-27: 7.8
  - Survey mean: 7.48
  - Maghreb: 7.4
  - Mashreq: 7.4
  - Mediterranean EU Countries: 7.4
  - Rest of EU: 7.77
  - European non EU: 8.45
Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008): **De-pollution of the Mediterranean** (%)

Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008): **Technologies and efficient use of water** (average on a scale of 0-10)

Assessment of the level of importance for each of the priorities for water projects identified in the 3rd Euro-Mediterranean Ministerial Conference on Water (Jordan, December 2008): **Technologies and efficient use of water** (%)
D5. Do you have a good knowledge or a clear perception of Euro-Mediterranean water cooperation?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No answer</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euro-Mediterranean water cooperation</td>
<td>184</td>
<td>379</td>
<td>35</td>
<td>598</td>
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<tr>
<td></td>
<td>30.8%</td>
<td>63.4%</td>
<td>5.9%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Knowledge or a clear perception of the effectiveness of the impact of agricultural liberalisation (%)
D.5.1 Among the eight cross-cutting objectives mentioned in the draft declaration of the April 2010 conference held in Barcelona regarding the Strategy for Water in the Mediterranean, how do you see the prospects for progress over the short term on each of them?

<table>
<thead>
<tr>
<th>Objective</th>
<th>Very negative</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure the integration of policies, taking into consideration all the legitimate water uses and demands, including the environmental needs</td>
<td>2 6 6 13 19 40 46 18 15 2 9</td>
<td></td>
<td>176</td>
<td>6</td>
<td>182</td>
</tr>
<tr>
<td>Enhance and facilitate the participation of all stakeholders, with emphasis on gender-balanced and poverty alleviation considerations</td>
<td>3 4 8 14 22 31 44 19 13 6 12</td>
<td></td>
<td>176</td>
<td>6</td>
<td>182</td>
</tr>
<tr>
<td>Increase citizens’ awareness of the value of water and its culture, enhance education for environmental and sustainable development</td>
<td>1 3 5 5 9 30 30 32 29 11 20</td>
<td></td>
<td>175</td>
<td>7</td>
<td>182</td>
</tr>
<tr>
<td>Ensure the capacity building of water management and environmental protection administrations, technicians, farmers and all competent stakeholders</td>
<td>1 6 2 7 13 28 26 32 19 13 6</td>
<td></td>
<td>177</td>
<td>5</td>
<td>182</td>
</tr>
<tr>
<td>Secure comparable water data collection and monitoring</td>
<td>2 2 4 7 15 28 29 32 25 17 15</td>
<td></td>
<td>176</td>
<td>6</td>
<td>182</td>
</tr>
<tr>
<td>Support research in all water aspects, such as desertification and climate change</td>
<td>2 2 2 3 14 29 27 26 23 22 25</td>
<td></td>
<td>175</td>
<td>7</td>
<td>182</td>
</tr>
<tr>
<td>Establish and support fair and socially sensitive valuation and cost recovery, including tariffs to support operation and maintenance costs and fees collection</td>
<td>2 4 7 17 10 40 27 21 14 14 12</td>
<td></td>
<td>168</td>
<td>14</td>
<td>182</td>
</tr>
<tr>
<td>Ensure optimal use of available instruments, e.g. Best Available Techniques (BATs) and Best Environmental Practices (BEPs) as well as Environmental Impact Assessment (EIA) and Strategic Environmental Assessment (SEA)</td>
<td>2 3 3 14 14 27 27 26 19 12 22</td>
<td></td>
<td>169</td>
<td>13</td>
<td>182</td>
</tr>
</tbody>
</table>

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Ensure the integration of policies, taking into consideration all the legitimate water uses and demands, including the environmental needs (average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>5.53</td>
</tr>
<tr>
<td>EU-27</td>
<td>5.47</td>
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<tr>
<td>Survey mean</td>
<td>5.47</td>
</tr>
<tr>
<td>Maghreb</td>
<td>5.48</td>
</tr>
<tr>
<td>Mashreq</td>
<td>5.8</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>5.48</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>5.43</td>
</tr>
<tr>
<td>European non EU</td>
<td>6.5</td>
</tr>
</tbody>
</table>
Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Ensure the integration of policies, taking into consideration all the legitimate water uses and demands, including the environmental needs (%)

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Enhance and facilitate the participation of all stakeholders, with emphasis on gender-balanced and poverty alleviation considerations (average on a scale of 0-10)

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Enhance and facilitate the participation of all stakeholders, with emphasis on gender-balanced and poverty alleviation considerations (%)

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: *Increase citizens’ awareness of the value of water and its culture, enhance education for environmental and sustainable development* (average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>6.85</td>
<td>6.3</td>
<td>6.57</td>
<td>7.09</td>
<td>6.72</td>
<td>5.5</td>
<td>6.75</td>
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</tbody>
</table>

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: *Increase citizens’ awareness of the value of water and its culture, enhance education for environmental and sustainable development* (%)

<table>
<thead>
<tr>
<th>Category</th>
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<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very negative</td>
<td>1</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3%</td>
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<tr>
<td>Don’t know</td>
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<td>6%</td>
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<tr>
<td>Very positive</td>
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<td>1</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11%</td>
</tr>
</tbody>
</table>

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: *Ensure the capacity building of water management and environmental protection administrations, technicians, farmers and all competent stakeholders* (average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>6.86</td>
<td>6.24</td>
<td>6.5</td>
<td>6.64</td>
<td>6.48</td>
<td>5.7</td>
<td>7.00</td>
</tr>
</tbody>
</table>

IEMed.
Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Ensure the capacity building of water management and environmental protection administrations, technicians, farmers and all competent stakeholders (%)

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Secure comparable water data collection and monitoring (average on a scale of 0-10)

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Secure comparable water data collection and monitoring (%)

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: **Support research in all water aspects, such as desertification and climate change** (average on a scale of 0-10)

- **Mediterranean Partner Countries**: 7.15
- **EU-27**: 6.62
- **Survey mean**: 6.81
- **Maghreb**: 7.16
- **Mashreq**: 7.54
- **Mediterranean EU Countries**: 6.87
- **Rest of EU**: 6.23
- **European non EU**: 3.75

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: **Support research in all water aspects, such as desertification and climate change (%)**

- **Very positive**: 14%
- **Very positive**: 13%
- **Survey mean**: 15%
- **Very positive**: 15%
- **Survey mean**: 17%
- **Very positive**: 8%
- **Very positive**: 2%
- **Very positive**: 1%
- **Very positive**: 1%
- **Very negative**: 1%

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: **Establish and support fair and socially sensitive valuation and cost recovery, including tariffs to support operation and maintenance costs and fees collection** (average on a scale of 0-10)

- **Mediterranean Partner Countries**: 6.01
- **EU-27**: 6.64
- **Survey mean**: 5.81
- **Maghreb**: 5.74
- **Mashreq**: 6.64
- **Mediterranean EU Countries**: 5.82
- **Rest of EU**: 5.33
- **European non EU**: 6.25
Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Establish and support fair and socially sensitive valuation and cost recovery, including tariffs to support operation and maintenance costs and fees collection (%)

- Very positive: 10%
- 9%
- 8%
- 7%
- 6%
- 5%
- 4%
- 3%
- 2%
- 1%
- Very negative: 0%

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Ensure optimal use of available instruments, e.g. Best Available Techniques (BATs) and Best Environmental Practices (BEPs) as well as Environmental Impact Assessment (EIA) and Strategic Environmental Assessment (SEA) (average on a scale of 0-10)

- Mediterranean Partner Countries: 6.91
- EU-27: 5.64
- Survey mean: 6.31
- Maghreb: 6.7
- Mashreq: 7.09
- Mediterranean EU Countries: 6.13
- Rest of EU: 5.76
- European non EU: 6.5

Assessment of the prospects for progress over the short term of the Strategy for Water in the Mediterranean: Ensure optimal use of available instruments, e.g. Best Available Techniques (BATs) and Best Environmental Practices (BEPs) as well as Environmental Impact Assessment (EIA) and Strategic Environmental Assessment (SEA) (%)
D5.2. Regional project. How do you assess the progress of the UfM project Sustainable Water Management and De-pollution of the Mediterranean?


<table>
<thead>
<tr>
<th>Assessment of the UfM programme Sustainable Water Management and De-pollution of the Mediterranean (average on a scale of 0-10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
</tr>
<tr>
<td>EU-27</td>
</tr>
<tr>
<td>Survey mean</td>
</tr>
<tr>
<td>Maghreb</td>
</tr>
<tr>
<td>Mashreq</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
</tr>
<tr>
<td>Rest of EU</td>
</tr>
<tr>
<td>European non EU</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
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<td>28</td>
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<td>4</td>
<td>46</td>
<td>46</td>
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<td>5</td>
<td>28</td>
<td>28</td>
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<td>6</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>7</td>
<td>10</td>
<td>10</td>
</tr>
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<td>7</td>
<td>7</td>
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<td>6</td>
<td>6</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>182</td>
</tr>
<tr>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

Assessment of the UfM programme Sustainable Water Management and De-pollution of the Mediterranean
Assessment of the UfM programme Sustainable Water Management and De-pollution of the Mediterranean countries involved (average on a scale of 0-10)

Survey mean
- Tunisia: 6.63
- Syria: 4.67
- Occupied Palestinian Territory: 5.67
- Algeria: 6.31
- Egypt: 6.63
- Israel: 4.67
- Jordan: 5.67
- Lebanon: 6.8
- Morocco: 5.56

Assessment of the prospects for progress over the short term of the objectives of the Strategy for Water in the Mediterranean (average on a scale of 0-10)

- Ensure the integration of policies, taking into consideration all the legitimate water uses and demands, including the environmental needs: 5.47
- Enhance and facilitate the participation of all stakeholders, with emphasis on gender-balanced and poverty alleviation considerations: 5.57
- Increase citizens' awareness of the value of water and its culture, enhance education for environmental and sustainable development: 6.67
- Ensure the capacity building of water management and environmental protection administrations, technicians, farmers and all competent stakeholders: 6.5
- Secure comparable water data collection and monitoring: 6.43
- Support research in all water aspects, such as desertification and climate change: 6.81
- Establish and support fair and socially sensitive valuation and cost recovery, including tariffs to support operation and maintenance costs and fees collection: 5.81
- Ensure optimal use of available instruments, e.g. Best Available Techniques (BATs) and Best Environmental Practices (BEPs) as well as Environmental Impact Assessment (EIA) and Strategic Environmental Assessment (SEA): 6.31
- D5.2 Assessment of the UfM programme Sustainable Water Management and De-pollution of the Mediterranean: 6.07
- D5.3 Assessment of the MEDA WATER – Resource management, regional programme: 5.22
D5.3. What is your assessment of the following regional programme? MEDA WATER – Resource management
Reinforces regional cooperation and develops proposals on water management, through capacity strengthening, training, information and know-how exchanges: Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey
Timeframe: 2003-2008 Budget: €40 million (MEDA)

<table>
<thead>
<tr>
<th></th>
<th>Very negative</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEDA WATER – Resource management</td>
<td>4 0 1 8 21 36 30 31 21 9 6</td>
<td>1% 0% 1% 5% 13% 22% 18% 19% 13% 5% 4%</td>
<td>164</td>
<td>18</td>
<td>182</td>
</tr>
</tbody>
</table>

(*): Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**): Total number of respondents including “Don’t know” answers

Assessment of the MEDA WATER – Resource management, regional programme
(average on a scale of 0-10)

Assessment of the MEDA WATER – Resource management, regional programme (%)

Don’t know: 10%
Very positive: 10%
Very negative: 1%
**Energy Cooperation**

D6. Do you consider progress was achieved between July 2009-July 2010 in the implementation of the 2008-2013 Limassol Priority Action Plan on the Euro-Mediterranean Energy Partnership?

### Assessment of the progress achieved between July 2009-July 2010 in the implementation of the 2008-2013 Limassol Priority Action Plan on the Euro-Mediterranean Energy Partnership

<table>
<thead>
<tr>
<th>Action Area</th>
<th>Progress</th>
<th>No progress</th>
<th>Regression</th>
<th>Don’t know</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving harmonisation and integration of markets and legislation</td>
<td>37%</td>
<td>60%</td>
<td>2%</td>
<td>100%</td>
<td>285</td>
</tr>
<tr>
<td>Promoting sustainable development in the sector</td>
<td>54%</td>
<td>41%</td>
<td>5%</td>
<td>100%</td>
<td>311</td>
</tr>
<tr>
<td>Developing initiatives of common interests in key areas, such as infrastructure extension, investment financing and R&amp;D</td>
<td>50%</td>
<td>45%</td>
<td>5%</td>
<td>100%</td>
<td>296</td>
</tr>
</tbody>
</table>

(* Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(** Total number of respondents including “Don’t know” answers)

- Improving harmonisation and integration of markets and legislation:
  - Progress: 36%
  - No progress: 59%
  - Regression: 5%
  - Don’t know: 43%

- Promoting sustainable development in the sector:
  - Progress: 54%
  - No progress: 40%
  - Regression: 6%
  - Don’t know: 37%

- Developing initiatives of common interests in key areas, such as infrastructure extension, investment financing and R&D:
  - Progress: 47%
  - No progress: 47%
  - Regression: 6%
  - Don’t know: 39%


- Improving harmonisation and integration of markets and legislation:
  - Progress: 39%
  - No progress: 61%
  - Don’t know: 55%

- Promoting sustainable development in the sector:
  - Progress: 55%
  - No progress: 42%
  - Regression: 4%
  - Don’t know: 52%

- Developing initiatives of common interests in key areas, such as infrastructure extension, investment financing and R&D:
  - Progress: 55%
  - No progress: 41%
  - Regression: 4%
  - Don’t know: 55%
**D7. Do you have a good knowledge or a clear perception of Euro-Mediterranean energy sector cooperation?**

<table>
<thead>
<tr>
<th>Euro-Mediterranean energy sector cooperation</th>
<th>Yes</th>
<th>No</th>
<th>No answer</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>170</td>
<td>391</td>
<td>37</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>28.4%</td>
<td>65.4%</td>
<td>6.2%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Knowledge or a clear perception of Euro-Mediterranean energy sector cooperation (%)

- **Mediterranean Partner Countries**: 32.3% Yes, 60.7% No, 71% Total
- **EU-27**: 24% Yes, 70.6% No, 5.4% Total
- **Survey mean**: 28.4% Yes, 65.4% No, 6.2% Total
- **Maghreb**: 42.4% Yes, 50.8% No, 6.8% Total
- **Mashreq**: 24.1% Yes, 68.8% No, 71% Total
- **Mediterranean EU Countries**: 32.5% Yes, 63.8% No, 3.8% Total
- **Rest of EU**: 14% Yes, 74% No, 7.4% Total
- **European non EU**: 26.7% Yes, 60% No, 13.3% Total

- **Yes**
- **No**
- **No answer**
### D.7.1 How would you evaluate the following regional projects?

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Electricity market integration.</strong> Supports the development of an integrated electricity market between Algeria, Morocco and Tunisia and between these three Maghreb countries and the EU, through the harmonisation of their legislative and regulatory framework. Timeframe: 2007-2010 Budget: €4.9 million (MEDA)</td>
<td>0 3 0 14 17 41 32 22 17 5 6 157</td>
<td>2% 2% 2% 9% 11% 26% 20% 14% 11% 3% 4% 100%</td>
<td>12 169</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>EAMGM II – Euro-Arab Mashreq Gas Market Project.</strong> Supports the development of an integrated gas market in order to create a regional gas market and as a step towards integrating with the EU gas market. Egypt, Iraq, Jordan, Lebanon, Syria, Turkey. Timeframe: 2010-2013 Budget: €5 million EU contribution</td>
<td>0 3 2 8 17 31 31 22 12 10 5 141</td>
<td>2% 2% 1% 6% 12% 22% 22% 16% 9% 7% 4% 100%</td>
<td>28 169</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MED-EMIP – Energy cooperation.</strong> A platform for energy policy dialogue and exchange of experiences, leading to enhanced Euromed cooperation, integration of the energy markets and improved security and sustainability. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey. Timeframe: 2007-2010 Budget: €4.1 million (MEDA)</td>
<td>2 1 5 15 15 34 32 20 20 5 10 159</td>
<td>1% 1% 3% 9% 9% 21% 20% 13% 13% 3% 6% 100%</td>
<td>10 169</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MED-ENEC II – Energy efficiency in construction.</strong> Encourages energy efficiency and the use of solar energy in the construction sector, through capacity building, fiscal and economic instruments and pilot projects. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey. Timeframe: 2009-2013 Budget: €5 million</td>
<td>1 3 6 14 22 31 21 24 17 9 8 156</td>
<td>1% 2% 4% 9% 14% 20% 13% 15% 11% 6% 5% 100%</td>
<td>13 169</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)  
(**) Total number of respondents including “Don’t know” answers
Evaluation of the regional energy projects: **Electricity market integration** (average on a scale of 0-10)

- Mediterranean Partner Countries: 6.09
- EU-27: 5.76
- Survey mean: 5.65
- Maghreb: 5.64
- Mashreq: 6.33
- Mediterranean EU Countries: 5.59
- Rest of EU: 5.06
- European non EU: 6.00

---

Evaluation of the regional energy cooperation projects: **Electricity market integration** (%)

- Don't know: 7%
- Very positive: 4%
- 9: 3%
- 8: 11%
- 7: 14%
- 6: 20%
- 5: 26%
- 4: 11%
- 3: 0%
- 2: 0%
- 1: 2%
- Very disappointing: 0%

---

Evaluation of the regional energy cooperation projects by beneficiary countries: **Electricity market integration** (average on a scale of 0-10)

- Survey mean: 5.76
- Morocco: 6.75
- Algeria: 6.0
- Tunisia: 5.76
- EU-27: 5.45
Evaluation of the regional energy cooperation projects: **EAMGM II – Euro-Arab Mashreq Gas Market Project** (average on a scale of 0-10)

- **Mediterranean Partner Countries**
  - EU-27: 5.44
  - Survey mean: 5.89
  - Maghreb: 5.67
  - Mashreq: 6.96

- **Mediterranean EU Countries**
  - Rest of EU: 5.5
  - European non EU: 6.25

Evaluation of the regional energy cooperation projects: **EAMGM II – Euro-Arab Mashreq Gas Market Project** (%)

- Don't know: 17%
- Very positive:
  - 10: 4%
  - 9: 7%
  - 8: 9%
  - 7: 16%
  - 6: 22%
  - 5: 22%
  - 4: 12%
  - 3: 6%
  - 2: 1%
  - 1: 2%
  - Very disappointing: 0%

Evaluation of the regional energy cooperation projects: **EAMGM II – Euro-Arab Mashreq Gas Market Project countries involved** (average on a scale of 0-10)

- Survey mean: 5.89
- Turkey: 6.33
- Syria: 8.67
- Lebanon: 6.8
- Jordan: 6.75
- Egypt: 6.91
- EU-27: 5.87
Evaluation of the regional energy cooperation projects: **MED-EMIP – Energy cooperation** (average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Survey Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>5.68</td>
</tr>
<tr>
<td>EU-27</td>
<td>6.67</td>
</tr>
<tr>
<td>Survey mean</td>
<td>5.81</td>
</tr>
<tr>
<td>Maghreb</td>
<td>5.58</td>
</tr>
<tr>
<td>Mashreq</td>
<td>6.54</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>6.65</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>5.72</td>
</tr>
<tr>
<td>European non EU</td>
<td>6.00</td>
</tr>
</tbody>
</table>

Evaluation of the regional energy cooperation projects: **MED-EMIP – Energy cooperation** (%)

| Category          | Don't know | Very positive | Very positive | Very positive | Very positive | Very positive | Very positive | Very positive | Very positive | Very positive |
|-------------------|------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
|                   | 5.9%       | 6.3%          | 3.1%          | 12.6%         | 12.6%         | 20.1%         | 21.4%         | 0.6%          | 1.3%          | 0             |

Evaluation of the regional energy cooperation projects by its beneficiary countries: **MED-EMIP – Energy cooperation countries involved** (average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Country</th>
<th>Survey Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey mean</td>
<td>5.81</td>
</tr>
<tr>
<td>Tunisia</td>
<td>5.43</td>
</tr>
<tr>
<td>Syria</td>
<td>6.67</td>
</tr>
<tr>
<td>Occupied Palestinian Territory</td>
<td>6.60</td>
</tr>
<tr>
<td>Morocco</td>
<td>6.50</td>
</tr>
<tr>
<td>Lebanon</td>
<td>7.40</td>
</tr>
<tr>
<td>Jordan</td>
<td>5.53</td>
</tr>
<tr>
<td>Israel</td>
<td>6.00</td>
</tr>
<tr>
<td>Egypt</td>
<td>6.55</td>
</tr>
<tr>
<td>Algeria</td>
<td>5.26</td>
</tr>
<tr>
<td>Turkey</td>
<td>6.25</td>
</tr>
<tr>
<td>EU-27</td>
<td>6.67</td>
</tr>
</tbody>
</table>
Evaluation of the regional energy cooperation projects: **MED-ENEC II – Energy efficiency in construction** (average on a scale of 0-10)

- Mediterranean Partner Countries: 5.58
- EU-27: 6.05
- Survey mean: 5.71
- Maghreb: 5.49
- Mashreq: 4.13
- Mediterranean EU Countries: 5.29
- Rest of EU: 5.17
- European non EU: 6.25

Evaluation of the regional energy cooperation projects: **MED-ENEC II – Energy efficiency in construction** (%)

- Don’t know: 8%
- Very positive: 5%
- Very positive: 9%
- 8: 11%
- 7: 19%
- 6: 14%
- 5: 14%
- 4: 9%
- 3: 4%
- 2: 2%
- 1: 1%
- Very disappointing: 0%

Evaluation of the regional energy cooperation projects by beneficiary countries: **MED-ENEC II – Energy efficiency in construction countries involved** (average on a scale of 0-10)

- Survey mean: 5.71
- Tunisia: 7.17
- Syria: 4.59
- Occupied Palestinian Territory: 7.33
- Morocco: 6.58
- Lebanon: 7.75
- Jordan: 6.97
- Israel: 5.47
- Egypt: 7.17
- Algeria: 6.47
- Turkey: 6.45
Electricity market integration. Supports the development of an integrated electricity market between Algeria, Morocco, and Tunisia and between these three Maghreb countries and the EU, through the harmonisation of their legislative and regulatory framework. Timeframe: 2007-2010
Budget: €4.9 million (MEDA)

EAMGM II – Euro-Arab Mashreq Gas Market Project. Supports the development of an integrated gas market in order to create a regional gas market and as a step towards integrating with the EU gas market. Egypt, Iraq, Jordan, Lebanon, Syria, Turkey. Timeframe: 2010-2013
Budget: €5 million EU contribution

MED-EMIP – Energy cooperation. A platform for energy policy dialogue and exchange of experiences, leading to enhanced Euromed cooperation, integration of the energy markets and improved security and sustainability. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey. Timeframe: 2007-2010
Budget: €4.1 million (MEDA)

MED-ENEC II – Energy efficiency in construction. Encourages energy efficiency and the use of solar energy in the construction sector, through capacity building, fiscal and economic instruments and pilot projects. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey. Timeframe: 2009-2013
Budget: €5 million

D7.2. How do you evaluate the relevance of the project “Paving the Way for the Mediterranean Solar Plan” adopted by the European Commission in November 2009 (€5 million) supporting improvement of framework conditions for renewable energy?

Low relevance | Very high relevance | Total* | Dkn | Total** |
--- | --- | --- | --- | --- |
“Paving the Way for the Mediterranean Solar Plan” | | | | |
0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 160 | 9 | 169 | 5% |
1% | 2% | 1% | 3% | 6% | 7% | 9% | 20% | 22% | 19% | 12% | 100% |

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

**Evaluation of the regional energy cooperation projects (average on a scale of 0-10)**
Evaluation of the relevance of the project “Paving the Way for the Mediterranean Solar Plan” adopted by the European Commission

(average on a scale of 0-10)

- Mediterranean Partner Countries: 7.48
- EU-27: 6.46
- Survey mean: 7.24
- Maghreb: 7.04
- Mashreq: 8.11
- Mediterranean EU Countries: 6.47
- Rest of EU: 8.41
- European non EU: 7.75

Evaluation of the relevance of the project “Paving the Way for the Mediterranean Solar Plan” adopted by the European Commission (%)

- Very high relevance: 12%
- High relevance: 19%
- Medium relevance: 22%
- Low relevance: 6%
**Environmental Cooperation**

D8. In your opinion, what is the added value of addressing the environment challenges in the Mediterranean at the regional level (i.e., in the EMP or UfM framework) instead of addressing them in the global framework of the United Nations, such as the Plan Bleu and others?

<table>
<thead>
<tr>
<th>Added value of addressing the environment challenges in the Mediterranean at the regional level</th>
<th>Very low</th>
<th>Very high</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>732</td>
<td>727</td>
<td>731</td>
<td>74</td>
<td>74</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

Evaluation of the added value of addressing the environment challenges in the Mediterranean at the regional level (i.e., in the EMP or UfM framework) instead of addressing them in the global framework of the United Nations, such as the Plan Bleu and others (average on a scale of 0-10)

Evaluation of the added value of addressing the environment challenges in the Mediterranean at the regional level (i.e., in the EMP or UfM framework) instead of addressing them in the global framework of the United Nations, such as the Plan Bleu and others (%)
D9. Do you have a good knowledge or a clear perception of Euro-Mediterranean environmental cooperation?

<table>
<thead>
<tr>
<th>Euro-Mediterranean environmental cooperation</th>
<th>Yes</th>
<th>No</th>
<th>No answer</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>171</td>
<td>389</td>
<td>38</td>
<td>598</td>
</tr>
<tr>
<td></td>
<td>28.6%</td>
<td>65.1%</td>
<td>6.4%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Knowledge or a clear perception of Euro-Mediterranean sector cooperation (%)
D9.1. How do you assess progress in each of the following sectors identified in the Horizon 2020 strategy?

### Assessment of the progress in the sectors identified in the Horizon 2020 strategy

<table>
<thead>
<tr>
<th>Sector</th>
<th>P</th>
<th>NP</th>
<th>R</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal waste</td>
<td>65</td>
<td>86</td>
<td>7</td>
<td>158</td>
</tr>
<tr>
<td></td>
<td>41%</td>
<td>54%</td>
<td>4%</td>
<td>100%</td>
</tr>
<tr>
<td>Urban waste water</td>
<td>77</td>
<td>72</td>
<td>10</td>
<td>159</td>
</tr>
<tr>
<td></td>
<td>48%</td>
<td>45%</td>
<td>6%</td>
<td>100%</td>
</tr>
<tr>
<td>Industrial emissions</td>
<td>56</td>
<td>87</td>
<td>15</td>
<td>158</td>
</tr>
<tr>
<td></td>
<td>35%</td>
<td>55%</td>
<td>9%</td>
<td>100%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)
(**) Total number of respondents including “Don’t know” answers

### Assessment of the progress in the sectors identified in the Horizon 2020 strategy: Mediterranean Partner Countries

<table>
<thead>
<tr>
<th>Sector</th>
<th>P</th>
<th>NP</th>
<th>R</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal waste</td>
<td>43</td>
<td>52</td>
<td>5%</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>43%</td>
<td>52%</td>
<td>5%</td>
<td>100%</td>
</tr>
<tr>
<td>Urban waste water</td>
<td>44</td>
<td>47</td>
<td>9%</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>44%</td>
<td>47%</td>
<td>9%</td>
<td>100%</td>
</tr>
<tr>
<td>Industrial emissions</td>
<td>41</td>
<td>50</td>
<td>10%</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>41%</td>
<td>50%</td>
<td>10%</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Assessment of the progress in the sectors identified in the Horizon 2020 strategy: EU-27 countries

<table>
<thead>
<tr>
<th>Sector</th>
<th>P</th>
<th>NP</th>
<th>R</th>
<th>Total*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal waste</td>
<td>38</td>
<td>59</td>
<td>3%</td>
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</tr>
<tr>
<td></td>
<td>38%</td>
<td>59%</td>
<td>3%</td>
<td>100%</td>
</tr>
<tr>
<td>Urban waste water</td>
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<td>42</td>
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<td>100%</td>
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<td></td>
<td>55%</td>
<td>42%</td>
<td>3%</td>
<td>100%</td>
</tr>
<tr>
<td>Industrial emissions</td>
<td>28</td>
<td>63</td>
<td>9%</td>
<td>100%</td>
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<tr>
<td></td>
<td>28%</td>
<td>63%</td>
<td>9%</td>
<td>100%</td>
</tr>
</tbody>
</table>
### D9.2. What is your assessment of the following regional programmes?

<table>
<thead>
<tr>
<th>Programme</th>
<th>Very disappointing</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMAP III – Sustainable environmental development</td>
<td>2 2 2 7 22 43 30 12</td>
<td>7 5 155</td>
<td>15</td>
<td>170</td>
<td>9%</td>
</tr>
<tr>
<td>SAFEMED II – Maritime safety and pollution prevention</td>
<td>4 3 4 13 32 29 20 16 4 4</td>
<td>143</td>
<td>27</td>
<td>170</td>
<td>16%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers

---

**Assessment of the environmental cooperation regional programmes:**

**SMAP III – Sustainable environmental development**  
(average on a scale of 0-10)

- SMAP III – Sustainable environmental development. Promotes sustainable development and supports high priority environmental related activities, through technical and financial assistance: Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey. Timeframe: 2005-2008. Budget: €15 million (MEDA)

  - Assessment: 5.48

- SAFEMED II – Maritime safety and pollution prevention. Promotes cooperation in maritime safety and security and prevention of pollution from ships by providing technical advice and support: Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia, Turkey. Timeframe: 2009-2011. Budget: €5.5 million (ENPI South)

  - Assessment: 5.68
Assessment of the environmental cooperation regional programmes: **SMAP III – Sustainable environmental development**

(average on a scale of 0-10)

- Mediterranean Partner Countries: 5.84
- EU-27: 5.45
- Survey mean: 5.68
- Maghreb: 5.58
- Mashreq: 6.11
- Mediterranean EU Countries: 5.51
- Rest of EU: 5.29
- European non EU: 8

Assessment of the environmental cooperation regional programmes: **SMAP III – Sustainable environmental development (%)**

- Very positive
  - 10: 3.2%
  - 9: 4.5%
  - 8: 7.7%
  - 7: 14.8%
  - 6: 19.4%
  - 5: 27.7%
  - 4: 14.2%
  - 3: 4.5%
  - 2: 1.3%
  - 1: 1.3%
  - 0: 1.3%

Assessment of the environmental cooperation regional programmes by its beneficiary countries: **SMAP III – Sustainable environmental development**

(average on a scale of 0-10)

- Survey mean: 5.68
- Tunisia: 6
- Syria: 6
- Occupied Palestinian Territory: 7
- Morocco: 5.44
- Lebanon: 6.33
- Jordan: 4.5
- Israel: 6
- Egypt: 6.99
- Algeria: 5.18
- Turkey: 7
Assessment of the environmental cooperation regional programmes: **SAFEMED II – Maritime safety and pollution prevention**

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>5.38</td>
</tr>
<tr>
<td>EU-27</td>
<td>5.22</td>
</tr>
<tr>
<td>Survey mean</td>
<td>5.48</td>
</tr>
<tr>
<td>Maghreb</td>
<td>4.38</td>
</tr>
<tr>
<td>Mashreq</td>
<td>5.7</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>5.41</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>4.75</td>
</tr>
<tr>
<td>European non EU</td>
<td>8</td>
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</table>

Assessment of the environmental cooperation regional programmes: **SAFEMED II – Maritime safety and pollution prevention** (%)

<table>
<thead>
<tr>
<th>Category</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t know</td>
<td>16</td>
</tr>
<tr>
<td>Very positive</td>
<td>2</td>
</tr>
<tr>
<td>Very positive</td>
<td>3</td>
</tr>
<tr>
<td>Very positive</td>
<td>11</td>
</tr>
<tr>
<td>Satisfied</td>
<td>14</td>
</tr>
<tr>
<td>Satisfied</td>
<td>20</td>
</tr>
<tr>
<td>Neutral</td>
<td>22</td>
</tr>
<tr>
<td>Neutral</td>
<td>9</td>
</tr>
<tr>
<td>Not satisfied</td>
<td>3</td>
</tr>
<tr>
<td>Not satisfied</td>
<td>2</td>
</tr>
<tr>
<td>Not satisfied</td>
<td>3</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>3</td>
</tr>
<tr>
<td>Very disappointing</td>
<td>3</td>
</tr>
</tbody>
</table>

Assessment of the environmental cooperation regional programmes by its beneficiary countries: **SAFEMED II – Maritime safety and pollution prevention**

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Country</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey mean</td>
<td>5.48</td>
</tr>
<tr>
<td>Tunisia</td>
<td>5.33</td>
</tr>
<tr>
<td>Syria</td>
<td>5.25</td>
</tr>
<tr>
<td>Occupied Palestinian Territory</td>
<td>5.33</td>
</tr>
<tr>
<td>Morocco</td>
<td>5.6</td>
</tr>
<tr>
<td>Lebanon</td>
<td>5</td>
</tr>
<tr>
<td>Jordan</td>
<td>3.33</td>
</tr>
<tr>
<td>Israel</td>
<td>6</td>
</tr>
<tr>
<td>Egypt</td>
<td>6.33</td>
</tr>
<tr>
<td>Algeria</td>
<td>5.8</td>
</tr>
<tr>
<td>Turkey</td>
<td>7.14</td>
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</tbody>
</table>

IEMed.
**Food Security**

D10. In your opinion, which of the following issues are more relevant for the next Ministerial Meeting in the field of food security, agriculture and rural development?

<table>
<thead>
<tr>
<th>Issue</th>
<th>Very negative</th>
<th>Very positive</th>
<th>Total*</th>
<th>Dkn</th>
<th>Total**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainable rural development</td>
<td>0%</td>
<td>100%</td>
<td>500</td>
<td>10%</td>
<td>100%</td>
</tr>
<tr>
<td>Development and promotion of quality products</td>
<td>1%</td>
<td>100%</td>
<td>494</td>
<td>11%</td>
<td>100%</td>
</tr>
<tr>
<td>Coordination of agricultural research</td>
<td>0%</td>
<td>100%</td>
<td>486</td>
<td>16%</td>
<td>100%</td>
</tr>
<tr>
<td>Activities in the area of sanitary and phytosanitary norms</td>
<td>0%</td>
<td>100%</td>
<td>476</td>
<td>15%</td>
<td>100%</td>
</tr>
<tr>
<td>Strengthening public policies for agricultural development</td>
<td>1%</td>
<td>100%</td>
<td>494</td>
<td>11%</td>
<td>100%</td>
</tr>
<tr>
<td>Creating grain stocks for the region</td>
<td>0%</td>
<td>100%</td>
<td>472</td>
<td>15%</td>
<td>100%</td>
</tr>
<tr>
<td>Implementing Mediterranean diet education policies</td>
<td>0%</td>
<td>100%</td>
<td>486</td>
<td>13%</td>
<td>100%</td>
</tr>
<tr>
<td>Developing agri-food industries in the Mediterranean</td>
<td>0%</td>
<td>100%</td>
<td>492</td>
<td>12%</td>
<td>100%</td>
</tr>
<tr>
<td>Increasing the articulation between the EU’s Common Agricultural Policy (CAP) and agricultural challenges for the Mediterranean Partner Countries</td>
<td>0%</td>
<td>100%</td>
<td>486</td>
<td>13%</td>
<td>100%</td>
</tr>
<tr>
<td>Gradually extending the CAP to Mediterranean Partner Countries</td>
<td>2%</td>
<td>100%</td>
<td>469</td>
<td>16%</td>
<td>100%</td>
</tr>
</tbody>
</table>

(*) Total number of answers expressing a particular assessment or opinion (i.e., excluding “Don’t know” answers)

(**) Total number of respondents including “Don’t know” answers
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:
(average on a scale of 0-10)

- Sustainable rural development
  - Mediterranean Partner Countries: 7.51
  - EU-27: 7.06
  - Survey mean: 7.24
  - Maghreb: 7.34
  - Mashreq: 8.11
  - Mediterranean EU Countries: 6.47
  - Rest of EU: 8.41
  - European non EU: 7.75

- Development and promotion of quality products
  - Mediterranean Partner Countries: 7.11
  - EU-27: 7.29
  - Survey mean: 7.29
  - Maghreb: 7.32
  - Mashreq: 6.72
  - Mediterranean EU Countries: 8.41
  - Rest of EU: 6.08
  - European non EU: 7.45

- Coordination of agricultural research
  - Mediterranean Partner Countries: 7.51
  - EU-27: 7.11
  - Survey mean: 7.11
  - Maghreb: 7.32
  - Mashreq: 6.72
  - Mediterranean EU Countries: 8.41
  - Rest of EU: 6.08
  - European non EU: 7.45

- Activities in the area of sanitary and phytosanitary norms
  - Mediterranean Partner Countries: 7.29
  - EU-27: 7.32
  - Survey mean: 7.32
  - Maghreb: 6.72
  - Mashreq: 7.29
  - Mediterranean EU Countries: 7.05
  - Rest of EU: 6.08
  - European non EU: 7.05

- Strengthening public policies for agricultural development
  - Mediterranean Partner Countries: 7.51
  - EU-27: 7.11
  - Survey mean: 7.11
  - Maghreb: 7.32
  - Mashreq: 6.72
  - Mediterranean EU Countries: 8.41
  - Rest of EU: 6.08
  - European non EU: 7.45

- Creating grain stocks for the region
  - Mediterranean Partner Countries: 7.29
  - EU-27: 7.32
  - Survey mean: 7.32
  - Maghreb: 6.72
  - Mashreq: 7.29
  - Mediterranean EU Countries: 7.05
  - Rest of EU: 6.08
  - European non EU: 7.05

- Implementing Mediterranean diet education policies
  - Mediterranean Partner Countries: 7.51
  - EU-27: 6.08
  - Survey mean: 6.08
  - Maghreb: 7.29
  - Mashreq: 7.26
  - Mediterranean EU Countries: 7.45
  - Rest of EU: 6.08
  - European non EU: 6.08

- Developing agri-food industries in the Mediterranean
  - Mediterranean Partner Countries: 7.29
  - EU-27: 7.32
  - Survey mean: 7.32
  - Maghreb: 6.72
  - Mashreq: 7.29
  - Mediterranean EU Countries: 7.05
  - Rest of EU: 6.08
  - European non EU: 7.05

- Increasing the articulation between the EU’s Common Agricultural Policy (CAP) and agricultural challenges for the Mediterranean Partner Countries
  - Mediterranean Partner Countries: 7.45
  - EU-27: 7.26
  - Survey mean: 7.26
  - Maghreb: 6.72
  - Mashreq: 7.45
  - Mediterranean EU Countries: 7.05
  - Rest of EU: 6.08
  - European non EU: 7.05

- Gradually extending the CAP to Mediterranean Partner Countries
  - Mediterranean Partner Countries: 7.29
  - EU-27: 7.32
  - Survey mean: 7.32
  - Maghreb: 6.72
  - Mashreq: 7.29
  - Mediterranean EU Countries: 7.05
  - Rest of EU: 6.08
  - European non EU: 7.05
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Sustainable rural development (%)**

- Very high: 10%
- Very low: 0%

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Development and promotion of quality products**

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7.21</td>
<td>7.06</td>
<td>7.27</td>
<td>7.24</td>
<td>7.01</td>
<td>7.64</td>
<td></td>
</tr>
</tbody>
</table>

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Development and promotion of quality products (%)**

- Very high: 12%
- Very low: 0%
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Coordination of agricultural research**
(average on a scale of 0-10)

- Mediterranean Partner Countries: 7.52
- EU-27: 6.73
- Survey mean: 7.11
- Maghreb: 7.78
- Mashreq: 7.43
- Mediterranean EU Countries: 7.07
- Rest of EU: 6.26
- European non EU: 6.79

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Activities in the area of sanitary and phytosanitary norms**
(average on a scale of 0-10)

- Mediterranean Partner Countries: 7.48
- EU-27: 7.18
- Survey mean: 7.29
- Maghreb: 7.65
- Mashreq: 7.22
- Mediterranean EU Countries: 7.35
- Rest of EU: 6.97
- European non EU: 7.45
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Activities in the area of sanitary and phytosanitary norms (%)**

<table>
<thead>
<tr>
<th>Level</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don't know</td>
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<td>74.4</td>
<td>73.2</td>
<td>7.8</td>
<td>7.49</td>
<td>7.33</td>
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</tr>
</tbody>
</table>

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Strengthening public policies for agricultural development**

(average on a scale of 0-10)

- Mediterranean Partner Countries: 76
- EU-27: 74.4
- Survey mean: 73.2
- Maghreb: 7.8
- Mashreq: 7.49
- Mediterranean EU Countries: 7.33
- Rest of EU: 6.67
- European non EU: 7.91

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Strengthening public policies for agricultural development (%)**

<table>
<thead>
<tr>
<th>Level</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
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</tbody>
</table>

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Strengthening public policies for agricultural development (%)**

<table>
<thead>
<tr>
<th>Level</th>
<th>Mediterranean Partner Countries</th>
<th>EU-27</th>
<th>Survey mean</th>
<th>Maghreb</th>
<th>Mashreq</th>
<th>Mediterranean EU Countries</th>
<th>Rest of EU</th>
<th>European non EU</th>
</tr>
</thead>
<tbody>
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<td>Don't know</td>
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</tr>
<tr>
<td>Very high 9</td>
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<tr>
<td>Very high 5</td>
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</tbody>
</table>
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Creating grain stocks for the region**
(average on a scale of 0-10)

- **Mediterranean Partner Countries**
  - EU-27: 6.70
  - Survey mean: 6.72
  - Maghreb: 7.23
  - Mashreq: 7.17
- **Mediterranean EU Countries**
  - Mediterranean EU Countries: 6.77
- **Rest of EU**
  - Rest of EU: 6.55
- **European non EU**
  - European non EU: 6.73

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Creating grain stocks for the region (%)**

- **Don't know**: 15%
- **Very high**: 11% (10)
- **Very high**: 11% (9)
- **Very high**: 17% (8)
- **Very high**: 17% (7)
- **Very high**: 16% (6)
- **Very high**: 15% (5)
- **Very high**: 6% (4)
- **Very high**: 3% (3)
- **Very high**: 2% (2)
- **Very low**: 1% (1)
- **Very low**: 2% (0)

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Implementing Mediterranean diet education policies**
(average on a scale of 0-10)

- **Mediterranean Partner Countries**
  - EU-27: 6.41
  - Survey mean: 6.08
  - Maghreb: 6.59
  - Mashreq: 6.38
- **Mediterranean EU Countries**
  - Mediterranean EU Countries: 6.09
- **Rest of EU**
  - Rest of EU: 5.41
- **European non EU**
  - European non EU: 7.18
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

Implementing Mediterranean diet education policies (%)

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

Developing agri-food industries in the Mediterranean

(average on a scale of 0-10)

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

Developing agri-food industries in the Mediterranean (%)

IEMed.
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:
**Increasing the articulation between the EU's Common Agricultural Policy (CAP) and agricultural challenges for the Mediterranean Partner Countries**
(average on a scale of 0-10)

![Bar chart showing the assessment of Mediterranean Partner Countries, EU-27, Survey mean, Maghreb, Mashreq, Mediterranean EU Countries, Rest of EU, and European non EU.](chart.png)

Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:
**Increasing the articulation between the EU's Common Agricultural Policy (CAP) and agricultural challenges for the Mediterranean Partner Countries (%)**

![Pie chart showing the percentage distribution of assessments.](piechart.png)
Assessment of the relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development:

**Gradually extending the CAP to Mediterranean Partner Countries**

(average on a scale of 0-10)

<table>
<thead>
<tr>
<th>Region</th>
<th>Survey Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mediterranean Partner Countries</td>
<td>7.32</td>
</tr>
<tr>
<td>EU-27</td>
<td>5.73</td>
</tr>
<tr>
<td>Maghreb</td>
<td>7.38</td>
</tr>
<tr>
<td>Mashreq</td>
<td>7.59</td>
</tr>
<tr>
<td>Mediterranean EU Countries</td>
<td>5.87</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>5.56</td>
</tr>
<tr>
<td>European non EU</td>
<td>6.55</td>
</tr>
</tbody>
</table>

Don't know: 16%
Very high: 13%
High: 13%
Very high: 16%
High: 11%
High: 13%
High: 13%
High: 6%
High: 5%
High: 3%
High: 4%
Very low: 2%