



# Towards a Renewed Partnership with the Southern Neighbourhood

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AS PART OF THIS PROJECT, THE EUROMESCO EUROMED SURVEY BUILDS ON AN ACCUMULATED 10 YEARS' EXPERIENCE OF THE IEMED'S EUROMED SURVEY AND AIMS TO GENERATE FIRST-HAND DATA AND EVIDENCE ON EUROPEAN NEIGHBOURHOOD POLICY (ENP) RELATED POLICIES AND PRIORITIES THAT CAN BE OF DIRECT USE FOR POLICY-MAKERS AND OTHER STAKEHOLDERS, AND CONTRIBUTE TO EVIDENCE-BASED RESEARCH AND INCLUSIVE POLICY-MAKING. IT ALSO SERVES AS A POWERFUL TOOL TO RAISE AWARENESS AMONG VARIOUS CONSTITUENCIES SUCH AS ACADEMIA, MEDIA, NGOS, COMPANIES, INTERNATIONAL ORGANISATIONS, GOVERNMENTS' REPRESENTATIVES AND DIPLOMATS FAMILIAR WITH REGIONAL AND NATIONAL ENP SOUTH ISSUES TO MOBILISE ALL SORTS OF EXPERTS, GIVING THEM THE POSSIBILITY TO EXPRESS THEIR ASSESSMENT AND PERCEPTION AND PUT FORWARD RECOMMENDATIONS.



# Towards a Renewed Partnership with the Southern Neighbourhood

Founded in 1996 and comprising 104 institutes from 29 European and South Mediterranean countries, EuroMeSCo is the main network of research centres in the Mediterranean, striving at building a community of institutes and think tanks committed to strengthening Euro-Mediterranean relations.



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Detailed results of the survey only available online at [www.iemed.org](http://www.iemed.org)

# INTRODUCTION

Josep Ferré  
Director General, IEMed.

The focus of this Survey emerged from the conjunction of the 25th anniversary of the Barcelona Process, the new challenges arising from the pandemic and the new European Union (EU) financial framework for 2021-27, which created a momentum for looking into new opportunities for the relations between the EU and its southern neighbours.

Eager to involve large constituencies and contribute to this reflection, as part of the project “EuroMeSCo: Connecting the Dots” the European Institute of the Mediterranean (IEMed) launched an inclusive consultation process ahead of the release of the Joint Communication on a Renewed Partnership with the Southern Neighbourhood - A New Agenda for the Mediterranean, by the EU. A consultation in the form of a questionnaire, targeting respondents from both the EU and southern neighbourhood countries, including experts, civil society representatives and policy-makers. In line with this context, the topic of the Survey is “Towards a Renewed Partnership with the Southern Neighbourhood” and the questionnaire is designed to incorporate the main topics that were to be introduced in the Joint Communication.

This publication contains seven analytical articles that echo some specific results of the Survey. **James Moran** examines the continuing importance of values in the EU-southern neighbourhood relationship. **Florence Gaub** analyses the management of climate change in the southern neighbourhood and explores if it could become a crucial driver for modernisation in the region. **Katarzyna W. Sidło** looks closer into the digitalisation agenda, particularly at a time when the pandemic has shown the significance of digitalisation processes. Four additional articles have a country specific focus, providing the views from Morocco, Israel, Jordan and Egypt on the renewed partnership with the EU. **Nezha Alaoui M’Hammdi** analyses if the New Agenda for the Mediterranean will continue to offer a differential treatment for Morocco in its relations with the EU. **Alfred Tovas** reviews and evaluates EU-Israel cooperation in the last 25 years and analyses what the New Agenda offers Israel. **Kareem Sharabi Rosshandler** offers an analysis for Jordan highlighting the opportunity the partnership can provide to the country’s objective to have a competitive edge in its transition towards a specialised products and services economy. Finally, **Gamal A. Gawad Soltan** puts a special focus on the last 10 years during which Egypt has been dealing with the emerging threats in the Mediterranean, while continuing to address the much older concerns related to economic development.

While the complete set of results can be accessed online, this publication also contains a descriptive report that provides an overall picture of the main results. In general terms, results show that the renewed partnership has to prioritise inclusive growth and the social dimension, which are seen as key elements for facing current challenges, to seize opportunities but also for a partnership to be perceived as successful in the mid-term. It is also notable that the EU’s support for civil society, diversity, culture and education is perceived by respondents as its most successful action in the southern neighbourhood, and this is particularly relevant as the investment in education and human capital is considered all across the consultation as a key element to foster inclusive growth, to accompany the green and digital transitions or to counter violent extremist narratives and other security threats.

Another interesting finding in the Survey is that, although the challenge of the environmental situation and the climate change is differently perceived in the north (first priority) and the south (fourth priority), there is a common view on how to support the green and sustainable transition (green conditionality) and which measure has to be prioritised (water security). A similar trend can be seen in the case of migration and human mobility, where EU respondents are more prone to prioritise it than southern respondents but they agree that addressing root causes of irregular migration should be the top priority of the EU's external dimension action.

Finally, as far as opinions on issues related to peace and security cooperation are concerned, EU respondents are consistently more critical than southern neighbourhood respondents in preventing and countering violent extremism or maritime cooperation in the Mediterranean, while both commonly agree that the EU's internal divisions seriously affect its capacity to be a credible security provider in the region.

As previously mentioned, the design of the questionnaire provides insights into operationalising the Joint Communication. In this regard, one of the most interesting elements of the Survey results is contrasting to what extent the Survey patterns match with the strategic aims set out in the Joint Communication. The following highlights describe this matching test:

- Southern neighbourhood answers identify inclusive growth and social dimension as the main common challenge to be faced in a renewed partnership, an element that matches with the Joint Communication's idea of mainstreaming social economy and pursuing inclusive socioeconomic reforms.
- The New Agenda's renewed commitment to promote human rights and good governance in the EU's policies vis-à-vis its southern neighbourhood clearly matches with the Survey opinions, notably corruption, which is perceived as the main obstacle to an impactful Euro-Mediterranean cooperation.
- Investing in education and human capital is prominently mentioned in the Joint Communication, and results across the Survey show that EU actions on education are very visible and positively perceived in the southern neighbourhood countries.
- On EU perception in the southern neighbourhood, questioning how the EU could contribute more effectively to solving conflicts in the region, most answers refer the need to overcome the internal divisions. This matches with the Joint Communication, which admits quite honestly the impact of these divisions.

The matching test is not successful in two specific elements:

- Although the region is to be particularly hit by climate change, the importance of the cooperation on green transition is not equally perceived in the southern neighbourhood countries and the New Agenda for the Mediterranean. Hence, emphasis on ways to reduce this perception gap should be prioritised.
- Results on migration and human mobility show that all respondents consistently identify “building economic opportunities and addressing root causes of irregular migration” as the main priority while the Joint Communication is focused on jointly addressing the challenges of forced displacement and irregular migration and facilitating safe and legal pathways for migration and mobility. Cooperation in this field should therefore encompass these perspectives.



# DESCRIPTIVE REPORT



# Grasping the Scope of Expectations for the Renewed Partnership with the Southern Neighbourhood

The first block of the EuroMeSCo Euromed Survey aimed to define which challenges respondents expect the renewed partnership to address and what Mediterranean resources and actors the European Union (EU) should mobilise for this endeavour. It also sought to collect respondents' assessments of the achievements and shortfalls of the partnership as well as their recommendations regarding the changes that should be implemented in the context of its renewal.

## Main findings:

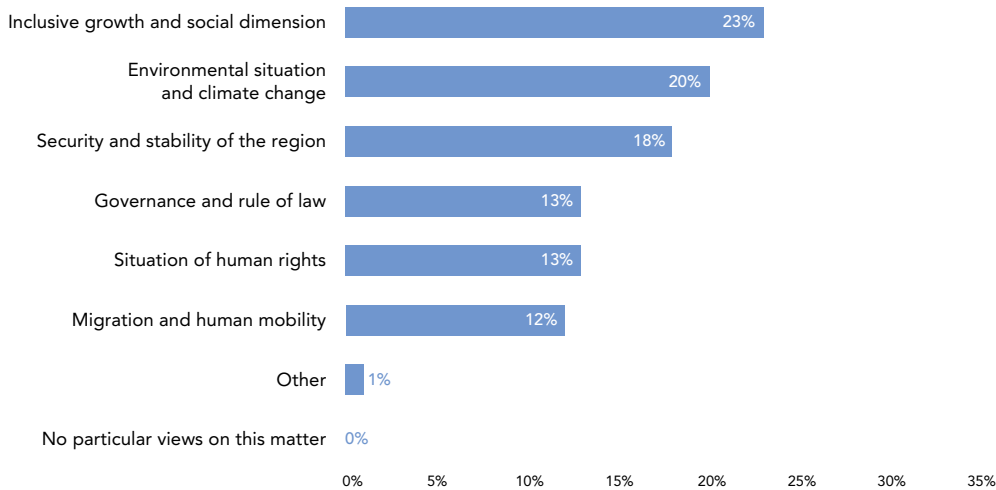
- There is a strong consensus amongst respondents of the Survey that inclusive growth and the social dimension is the challenge for which greater efforts are needed in the context of a renewed partnership between the EU and Southern Neighbourhood Countries (SNCs).
- Promoting an inclusive socioeconomic agenda for the benefit of youth, women and vulnerable groups is also seen as an opportunity that should be seized to give a new impetus to the partnership in the current situation.
- Respondents overall recognise the EU's contribution to sustainable and inclusive economic development as its main added value. EU respondents are more prone to highlight the EU's ambitions for climate neutrality than respondents from southern neighbourhood countries.
- Overall, environmental and climate change tend to be perceived as more pressing issues by EU respondents than by respondents from southern neighbourhood countries.

- The United Nations (UN) and the Union for the Mediterranean (UfM) are by and large deemed the most effective partners for the EU in dealing with most of the challenges posed by the partnership, ahead of other regional organisations involving neighbouring regions (e.g. African Union, Gulf Cooperation Council).
- To further support regional (UfM) and sub-regional frameworks (e.g. Western Mediterranean Forum), before mentioning the need to increase its financial support, a majority of respondents were of the opinion that the EU should encourage the frameworks to be more inclusive by engaging non-state actors, academic institutions and youths.
- Corruption, insufficient governance and institutional capacity are identified by respondents from both shores as the main constraint on cooperation between the EU and its southern partners.
- The EU's support to civil society, diversity, culture and education is perceived by respondents from both shores as the EU's most successful action in the southern neighbourhood.
- By 2030 the EU partnership with its neighbourhood will need to be more inclusive in order to be perceived as successful.

## Defining the Extent of Challenges and Opportunities

**Question 1** of the EuroMeSCo Euromed Survey invited respondents to choose and rank three top challenges for which greater efforts should be made in the framework of a renewed partnership between the EU and its southern partners. Almost a quarter of respondents (23%), and amongst them a very large proportion of civil society representatives and experts, ranked inclusive growth and the social dimension as the first priority challenge to be addressed. The second most prioritised challenge (20%) is the one that focuses on the environmental situation and climate change, particularly favoured by policy-makers. Respondents were less inclined to prioritise migration and human mobility, the human rights situation, governance and the rule of law.

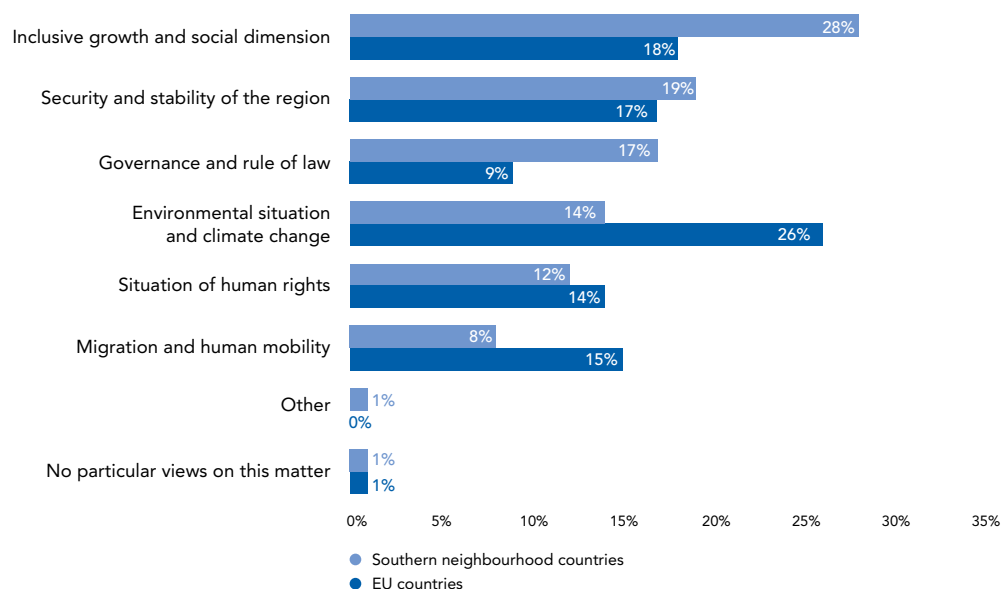
**Graph 1: Q.1 For which of the following challenges are greater efforts needed?**  
(Ranked as first option)



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

There are significant differences between the patterns of answers from southern and northern participants. For instance, southern neighbourhood respondents prioritise the challenge of inclusive growth and the social dimension to a larger extent (28%) than EU respondents (18%). Conversely, the challenge of the environmental situation and climate change is significantly more important for EU participants (26%) than for southern respondents (14%) (see graph 2). In addition, EU respondents (15%) are more prone to prioritise migration and human mobility than southern respondents (8%).

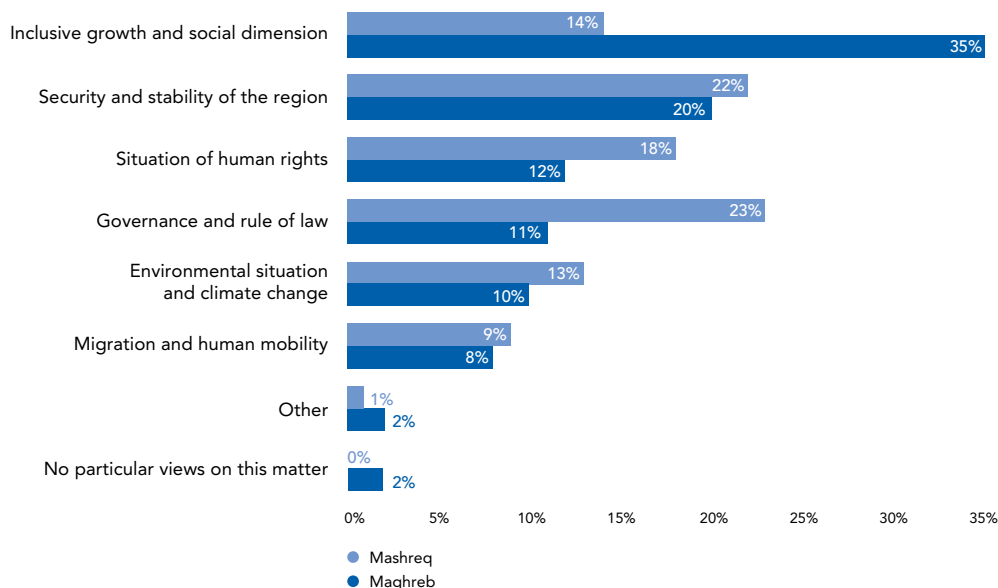
**Graph 2: Q.1 For which of the following challenges are greater efforts needed?**  
(Ranked as first option)



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

Another notable aspect of the breakdown of answers is that Maghreb respondents prioritise the challenge of inclusive growth and social dimension to a much larger extent (35%) than Mashreq respondents (14%) (see graph 2b). Conversely, the latter prioritise the challenge posed by governance and the rule of law to a larger extent (23%) than Maghreb respondents (11%).

**Graph 2b: Q.1 For which of the following challenges are greater efforts needed?**  
(Ranked as first option)



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

In their comments, some respondents highlighted the inter-relationship between all the challenges listed:

Tous les défis cités sont étroitement liés et interdépendants, mais sans une croissance économique inclusive et sans aborder la dimension sociale il sera difficile de relever les autres défis.

— French respondent

All the areas abovementioned are very important; however, if the top three are addressed, then the rest will automatically follow.

— The West Asia-North Africa (WANA) Institute

Other respondents hinted at more specific aspects related to these challenges:

Migration should be tackled from an “inclusive growth and social dimension” perspective, and not from a securitisation angle.

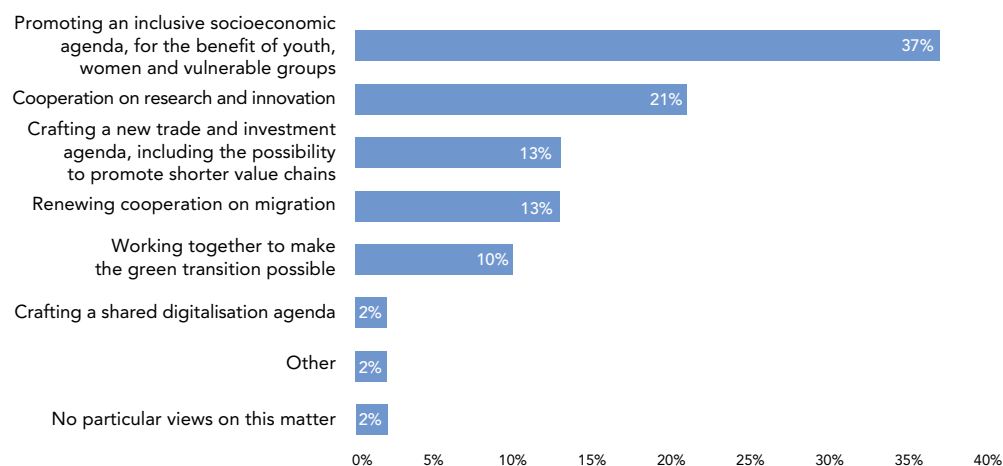
— Spanish respondent

Le principal problème au Moyen-Orient est le chômage, l'endettement et la création d'emplois pour les jeunes. Et ne pas laisser la jeunesse au vide, aux groupes extrémistes et terroristes. Bien entendu, sans stabilité, la région n'aurait pas une économie florissante. Et s'il y a un Etat de droit qui respecte les institutions, les lois et les valeurs, les choses seront excellentes.

— Hashemite University - International Relations and Strategic Studies Program

Building on the challenges identified in Question 1, **Question 2** invited respondents to identify the main opportunities to be seized in the context of a renewed partnership. Echoing the results of Q.1, more than one third of respondents (37%), including a majority of respondents representing civil society, ranked the promotion of an inclusive socioeconomic agenda, for the benefit of youths, women and vulnerable groups as the first opportunity to seize.

**Graph 3: Q.2** While dealing with these challenges, what are the main opportunities that the European Union and its southern partners should jointly seize? (Ranked as first option)

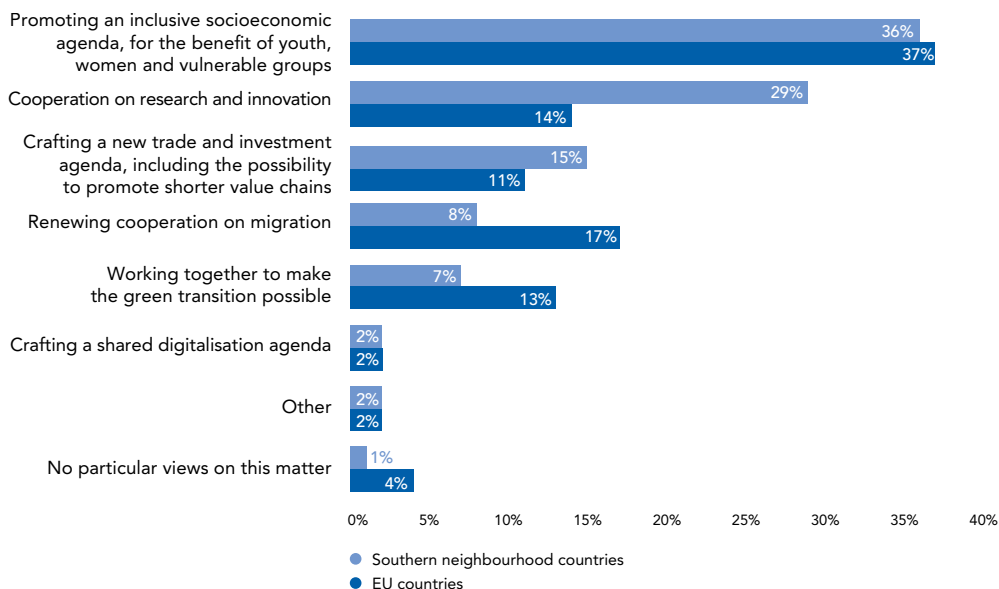


Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

The ranking of top opportunities to be seized was quite similar on both shores of the Mediterranean. Interestingly enough, cooperation on research and innovation was ranked almost twice as high a priority by participants from the South (29%) as by those from the North (14%) (see graph 4). The differences of patterns in the ranking of EU respondents and respondents from southern neighbourhood countries with regards to the green transition and migration are the same as those observed in the first question.

**Graph 4: Q.2** While dealing with these challenges, what are the main opportunities that the European Union and its southern partners should jointly seize?

(Ranked as first option)



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

In their comments, some respondents focused on inclusiveness as a method of co-operation and policy-making:

Institutionnaliser un mécanisme formel de dialogue entre la Commission européenne et le voisinage sud de la Méditerranée qui inclut des acteurs de la société civile pour une collaboration fructueuse à long terme.

— Majalat project

Reinforcing cooperation at all levels (from local to national to Mediterranean) between all actors (public, private, governmental and non-governmental) to reach a healthy and resilient Mediterranean Sea.

— Mediterranean Protected Areas Network (MedPAN)

## Identifying Relevant Pathways and Actors to Enhance Cooperation

Questions 3 and 4 intended to highlight the salience of regional and international partners and to identify which pathways of cooperation the EU should support in the framework of its cooperation with the southern neighbourhood countries.

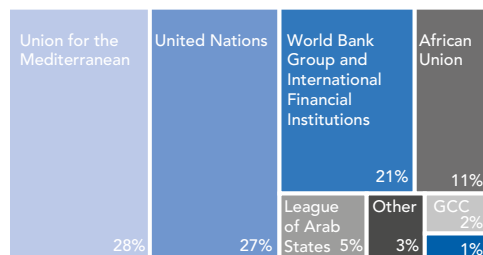
In **Question 3**, respondents identified which organisation would be most effective for the EU to partner with to deal with each of the challenges identified previously. The UN was most favoured by respondents with regards to challenges such as human rights and equality (36%), governance and rule of law (27%), migration (27%) as well as peace, security and stability in the region (26%). The World Bank Group and International Financial Institutions have been chosen as most effective partner regarding the challenge of inclusive economic growth and social dimension (27%). Finally, the UfM had, for each challenge listed, significantly high occurrences in the respondents' answers. It was ranked first concerning environmental degradation and climate change (28%).

The North Atlantic Treaty Organization (NATO) is mostly mentioned in reference to peace, security and stability in the region, as it is respondents' third most favoured partner in this area, right behind the UN and the UfM.

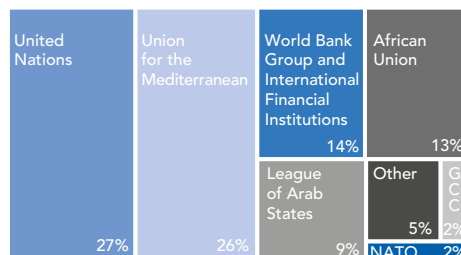
On the other hand, other regional subgroupings involving southern neighbourhood countries, such as the League of Arab States, and some of their own neighbours, such as the African Union (AU) and the Gulf Cooperation Council (GCC), lag significantly behind in the respondents' rankings. Amongst these, the AU, although comparatively less favoured by respondents, is recognised as more effective with regards to the challenge of migration than other challenges (see graph 5).

**Graph 5: Q.3 Most effective regional and multilateral partner(s) for the European Union in dealing with:**

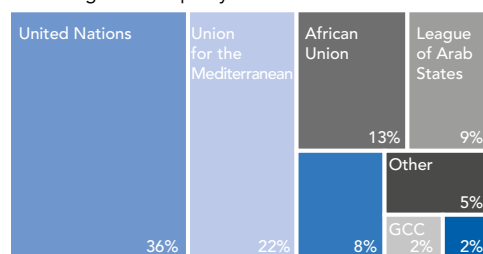
**Environmental degradation and climate change**



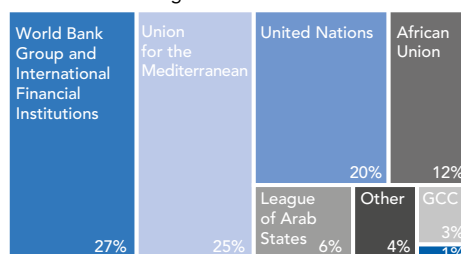
**Governance and rule of law**



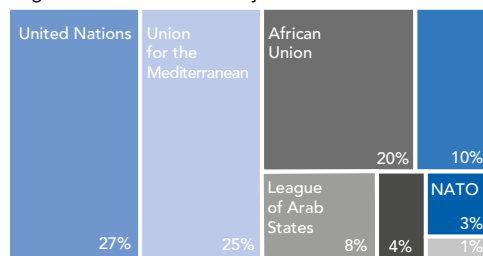
**Human rights and equality**



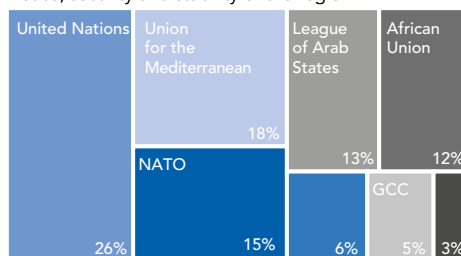
**Inclusive economic growth and social dimension**



**Migration and human mobility**



**Peace, security and stability of the region**

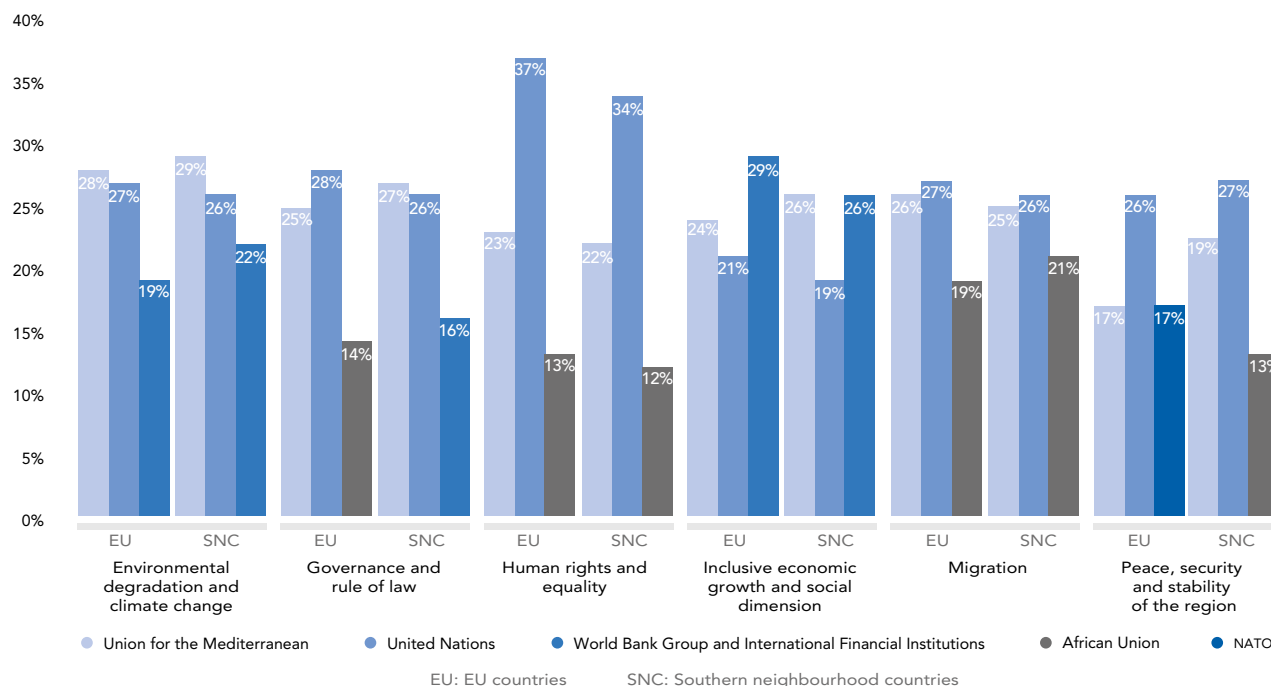


● Union for the Mediterranean ● League of Arab States ● African Union ● Gulf Cooperation Council  
 ● NATO ● United Nations ● World Bank Group and International Financial Institutions ● Other

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

Taking a closer look at the breakdown of answers on both shores, patterns of responses are rather homogeneous, apart from two specific results. On the one hand, while respondents from both shores highlight the World Bank Group and International Financial Institutions as the most effective partner in dealing with inclusive economic growth and social dimension, EU respondents do so to a more significant extent than respondents from southern neighbourhood countries, who elevate them at the same level as the UfM. On the other hand, with regards to the challenge of governance and rule of law, southern neighbourhood respondents have slightly favoured the UfM over the UN whereas for EU country respondents, the UN stands out more clearly in the lead (see graph 6).

**Graph 6: Q.3 Most effective regional and multilateral partner(s) for the European Union in dealing with:**

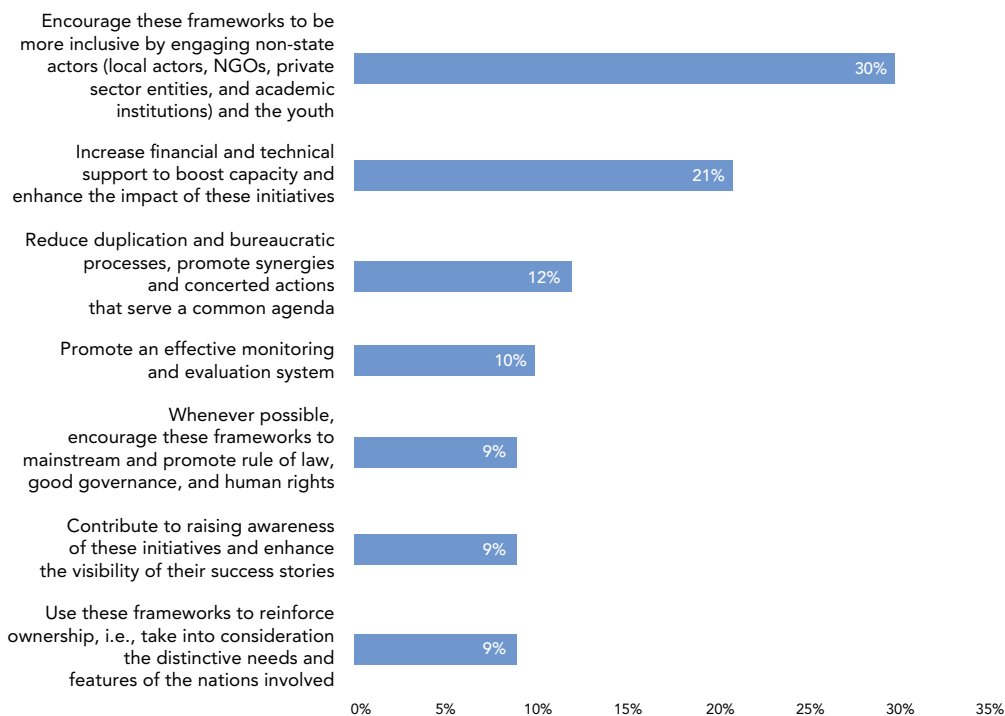


Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

**Question 4** let respondents share their point of view on what the EU could do to further support regional and sub-regional frameworks – such as the UfM, the 5+5 Dialogue, the WestMED initiative, the EastMed Gas Forum or the Agadir Agreement – as well as their potential in addressing the challenges of the Mediterranean region.

This question was open-ended, i.e. respondents were invited to formulate their answer without having to choose among pre-defined categories. The following picture emerges from the analysis of all answers. Almost one third of all respondents' answers (30%) referred in one way or another to the necessity to encourage the frameworks to be more inclusive by engaging non-state actors, including local actors, non-governmental organizations (NGOs), private sector entities, academic institutions and youths. Meanwhile, 21% of respondents recommended increasing financial and technical support to boost capacity and thereby enhance the impact of these initiatives. The remaining answers were rather evenly distributed amongst four other categories developed on the basis of the open-ended answers to the question (see graph 7).

**Graph 7: Q.4 What could the European Union do to further support these institutional frameworks and their potential in addressing the challenges in the region?**  
(Categories developed from the open-ended answers)



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

Some answers provided further details on the kind of actions to be taken by the EU with regards to this specific aspect of the cooperation:

The EU could use its leverage as a trade partner for the promotion of and respect for human rights (including political-civil and socioeconomic rights) and international law.

— Western Sahara Resource Watch

As per my perspective, the European Union should be more inclusive in its policies as up to now all it has created is a division of 'us' versus 'them'. The EU should further foster the cooperation beyond the EU states.

— Albanian respondent

L'UE devrait limiter le nombre des initiatives et essayer d'harmoniser les objectifs de celles existantes ainsi que les soutenir financièrement.

— Moroccan respondent

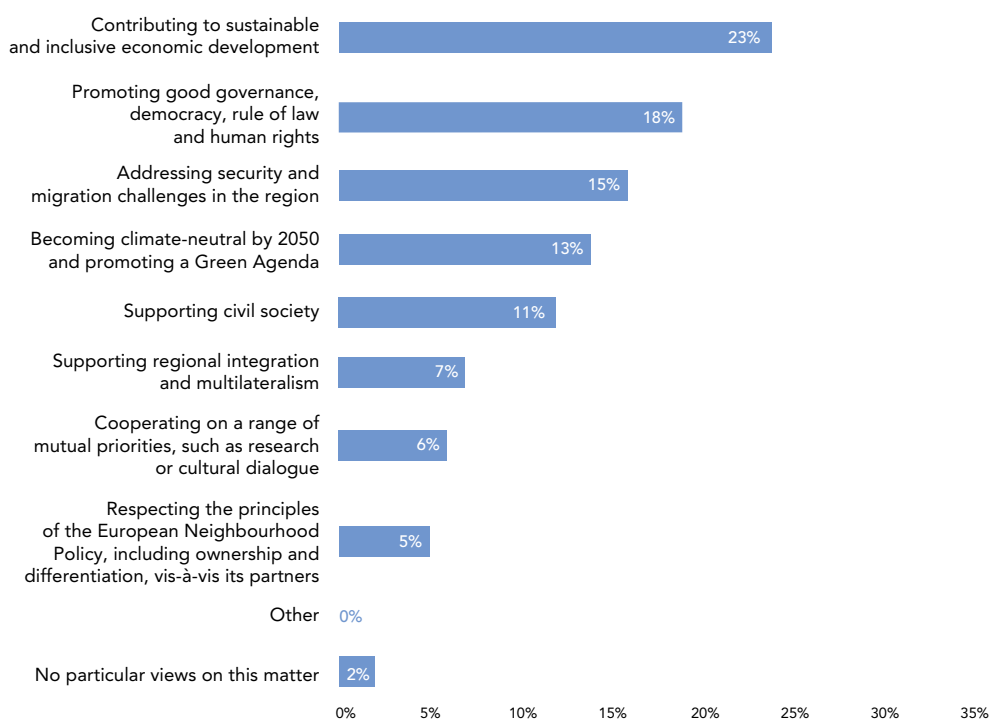
## Assessing the European Union's Actions and Perspectives

**Question 5** of the Survey invited respondents to choose and rank three options which represent the EU's added value compared to other global players increasingly involved in the Mediterranean region.

Almost one third of all respondents (23%) – with an even distribution of answers between experts, policy-makers and civil society representatives – designated the EU's contribution to sustainable and inclusive economic development first, just preceding the EU's promotion of good governance, democracy, rule of law and human rights (18%). This latter option was preferred by a larger proportion of respondents representing civil society representatives than by policy-makers.

Principles and actions often branded as distinctive features of the EU's foreign policy and in particular in the context of the European Neighbourhood Policy (ENP), including ownership, differentiation and support for multilateralism and regional integration, are not perceived by respondents as the most distinctive added value of the EU in the framework of its involvement in the Mediterranean region.

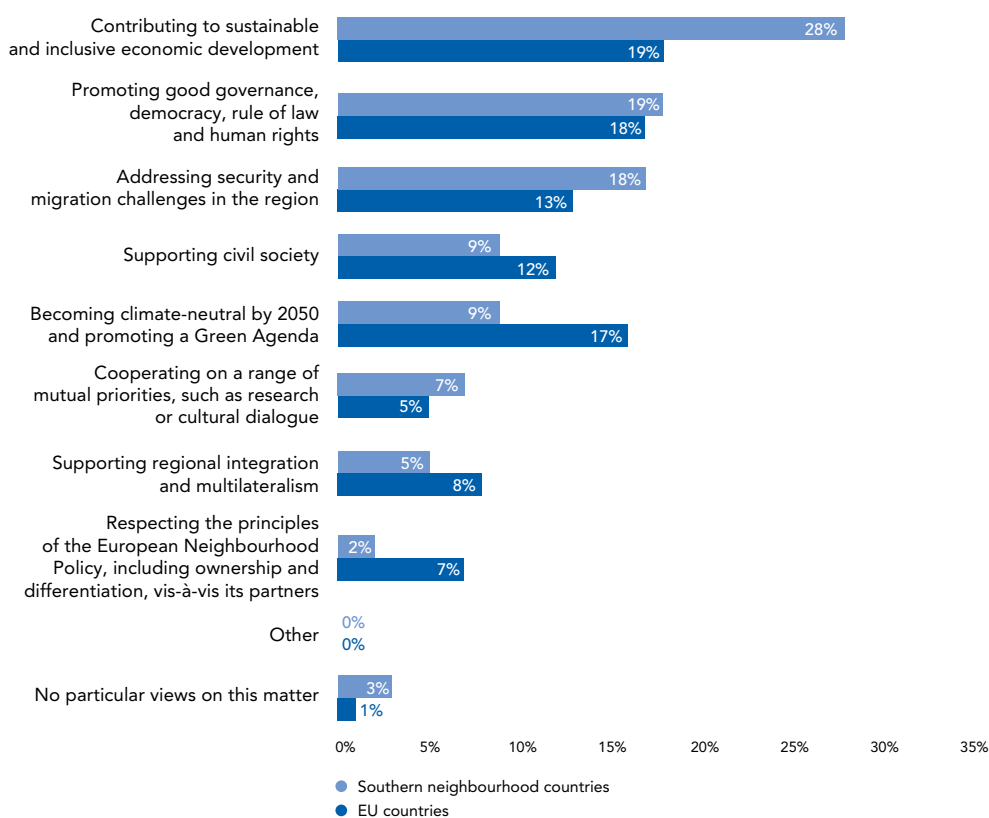
**Graph 8: Q.5 What is the European Union's added value compared to other global players that are increasingly active in the region? (Ranked as first option)**



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

Although both northern and southern neighbourhood respondents similarly considered these two options in the first rank of the EU's added values, the breakout of results for the first option between the two shores reveals a notable contrast as respondents from southern neighbourhood countries recognise the added value of the EU in contributing to sustainable and economic development to a much larger extent (28%) than EU respondents (19%). Indeed, for southern neighbourhood respondents the EU's capacity to address security and migration challenges of the region is recognised as an added value (18%) twice as much as the EU's ambitions for climate neutrality and Green Agenda promotion (9%). Reversely, EU respondents put more emphasis on becoming climate neutral and promoting the Green Agenda (17%) than on addressing security and migration challenges in the region (13%) as the EU's added values compared to other global players (see graph 9).

**Graph 9: Q.5 What is the European Union's added value compared to other global players that are increasingly active in the region? (Ranked as first option)**



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

In their comments, some respondents highlighted the EU's comparative advantage to act in the Mediterranean region:

By virtue of the geographical proximity and the common cultural and civilizational heritage, we believe that the European Union is more qualified than other global actors to cooperate with the countries of the region to face the various challenges.

— Egyptian respondent

Other respondents pointed at necessary adjustments to be made by the EU while facing other global players in the Mediterranean:

Any of these goals need to become focused on outcomes that are benchmarked according to their effectiveness.

— The Mediterranean Growth Initiative / ELIAMEP

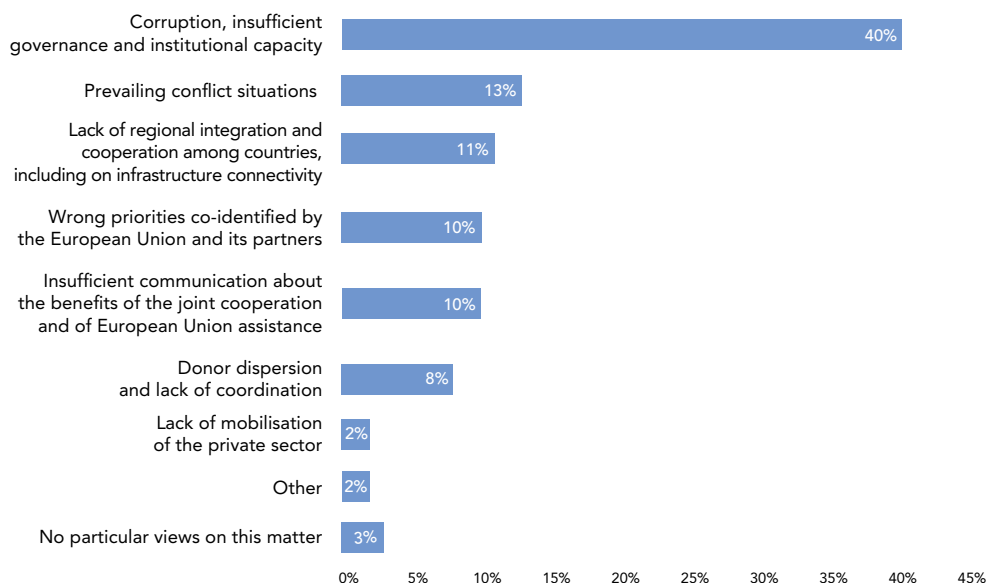
Let's not forget that the eastern Mediterranean is a highly problematic area, and it doesn't seem like Europe is doing much over there as compared to the US and Russia.

— Egyptian respondent

In contrast to the previous questions, **Question 6** aimed to expose the shortfalls of the cooperation framework between the EU and its southern partners and, to that end, proposed that respondents choose and rank three major constraints that limit its success and impact on improving the lives of peoples in southern countries.

Over one third of respondents (40%) – amongst which almost half from civil society, mostly represented by NGO-related respondents – ranked corruption, insufficient governance and institutional capacity as the first major constraint for the cooperation framework, way ahead of the second, namely the prevailing conflict situations and other items.

**Graph 10: Q.6 What are the major constraints limiting the success of the cooperation between the European Union and its southern neighbours?**  
(Ranked as first option)

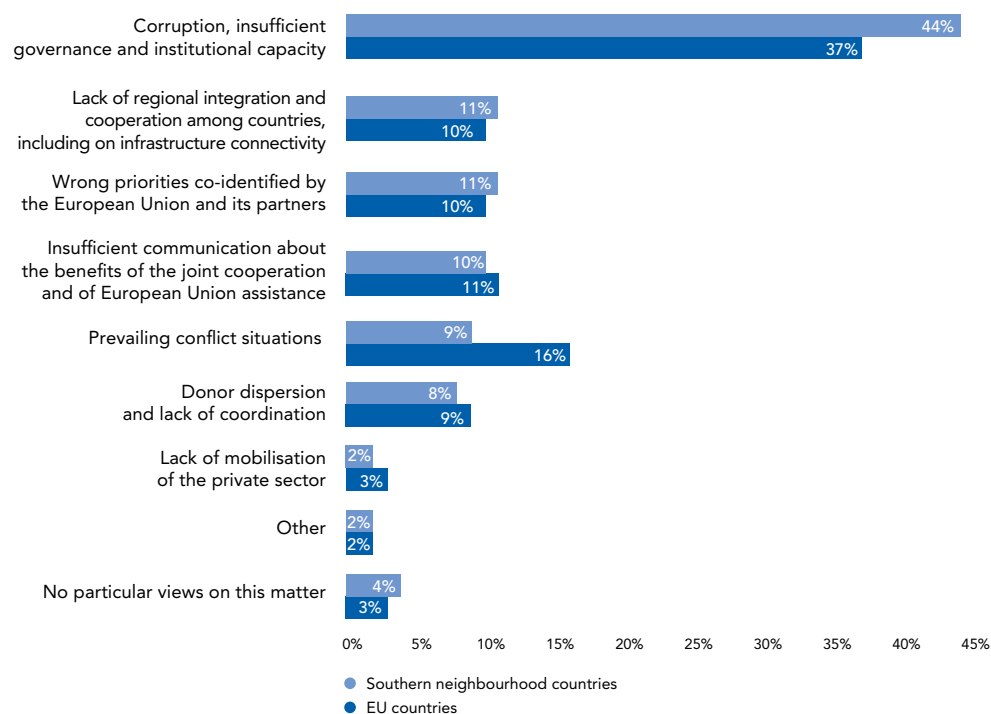


Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

The comparison of answers of respondents from both sides of the Mediterranean reveals some relevant nuances. Respondents from both shores chose corruption, insufficient governance and institutional capacity as the first constraint, although this choice was more significantly marked for the respondents of southern neighbourhood countries.

In addition, EU respondents prioritise prevailing conflict situations as a first-rank constraint twice as much as respondents from southern neighbourhood countries. The first-rank answers opting for the remaining constraint were also notably more evenly distributed by southern neighbourhood countries respondents than by EU respondents.

**Graph 11: Q.6 What are the major constraints limiting the success of the cooperation between the European Union and its southern neighbours? (Ranked as first option)**



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

Some respondents hinted at some other relevant constraints to the cooperation framework. The following particularly reflect the recurring opinions of respondents:

Unequal trade agreements result in a net transfer of wealth from south to north. If this imbalance is not corrected, there will not be a rapprochement between the countries of the different shores but only distancing. This is also the case from a political point of view.

— Un Ponte Per / Medlink

En ce qui concerne les priorités de l'UE, le contrôle des migrations et la lutte contre le terrorisme ne sont que les symptômes d'autres problèmes qui devraient être priorisés par l'UE et ses partenaires comme la justice sociale, le développement durable et le respect des droits humains.

— Belgian respondent

Rather than wrong priorities, Europe continues to address the wrong people, the ones who have always been at the receiving end of funds and grants. Please revisit youth engagement, starting by not categorizing them as disadvantaged. Youth in the north of the Mediterranean need to work jointly with the youth in the south of the Mediterranean towards joint environmental and socio-political goals.

— Egyptian respondent

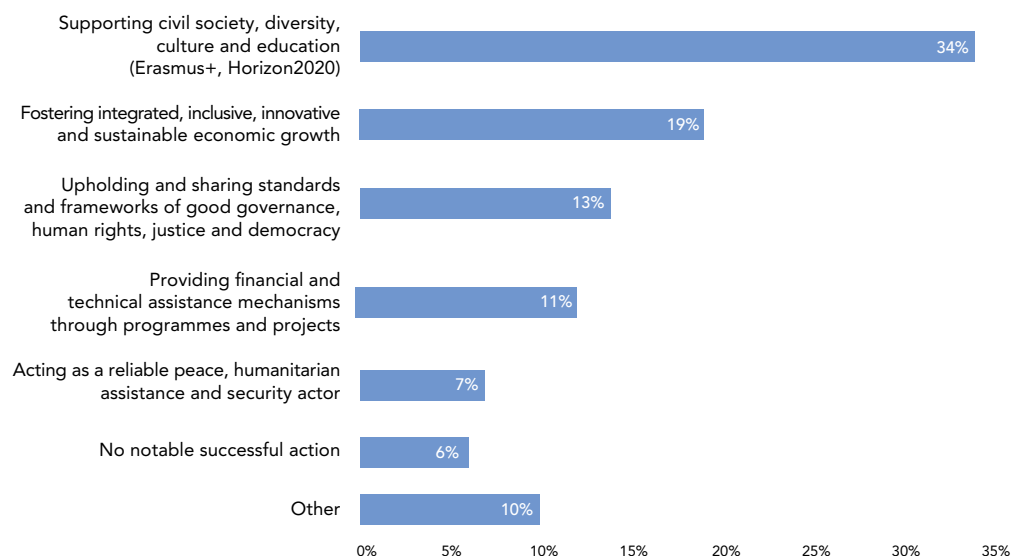
Identifying which NGOs and civil society groups to work with is essential since many are corrupt and act as fronts for money laundering. One thing for sure, working with organizations governed by current or previous politicians/government employees or any of their family members should be avoided at all cost.

— Institute of the Environment - University of Balamand

**Question 7** invited respondents to identify in their open-ended answers (without any imposed pre-established categories) the most successful action of the EU in the southern neighbourhood.

Amongst all respondents, one third hinted in one way or another at the EU's support for civil society, diversity through female, youth and vulnerable groups' inclusion, culture and education as its most successful action in southern neighbourhood countries. However, in Question 5, when considered in comparison to other actors' role in the region, this particular aspect of the EU's action was clearly less recognised by respondents as one of its added values. Only 7% of respondents mentioned the EU's achievements as a security provider.

**Graph 12: Q.7 What is the most successful action of the European Union in the southern neighbourhood or in your own country? (Categories developed from the open-ended answers)**



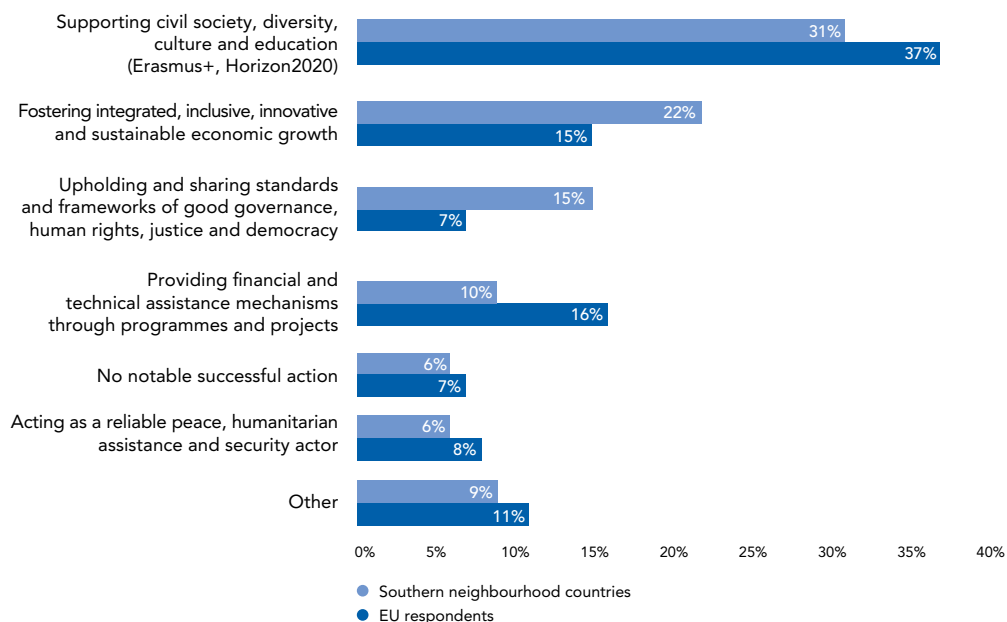
Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

Respondents from both shores of the Mediterranean acknowledge in the largest proportion the EU's support for civil society, diversity, culture and education as the most successful EU action in southern neighbourhood countries (see graph 13).

However, and in line with other findings of the Survey mentioned above, respondents from southern neighbourhood countries identify the EU's fostering of integrated, inclusive, innovative and sustainable economic growth to a larger extent (22%) than respondents from EU countries (15%). Similarly, southern respondents acknowledged the successful action of the EU in upholding and sharing standards and frameworks of good governance, human rights, justice and democracy twice as much (15%) as respondents from EU countries (7%).

In turn, EU respondents chose the EU's provision of financial and technical assistance mechanisms through programmes and projects as its most successful action to a larger extent (16%) than southern neighbourhood respondents (10%).

**Graph 13: Q.7 What is the most successful action of the European Union in the southern neighbourhood or in your own country? (Categories developed from the open-ended answers)**



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

Horizon 2020 and Erasmus+ are the programmes that respondents most cited in their answers to illustrate the EU's successful action in the southern neighbourhood. The comments of various respondents included specific examples of the EU's successful action and sometimes indicated how they could be further optimised:

Europe has been able to consolidate its interventions in the MENA region holistically within certain sectors (i.e. higher education). However, it should ensure that resources are rationally allocated with no overlap with further actors operating in the region and if possible, should guarantee higher levels of authority on resources management and expenditures.

— Italian respondent

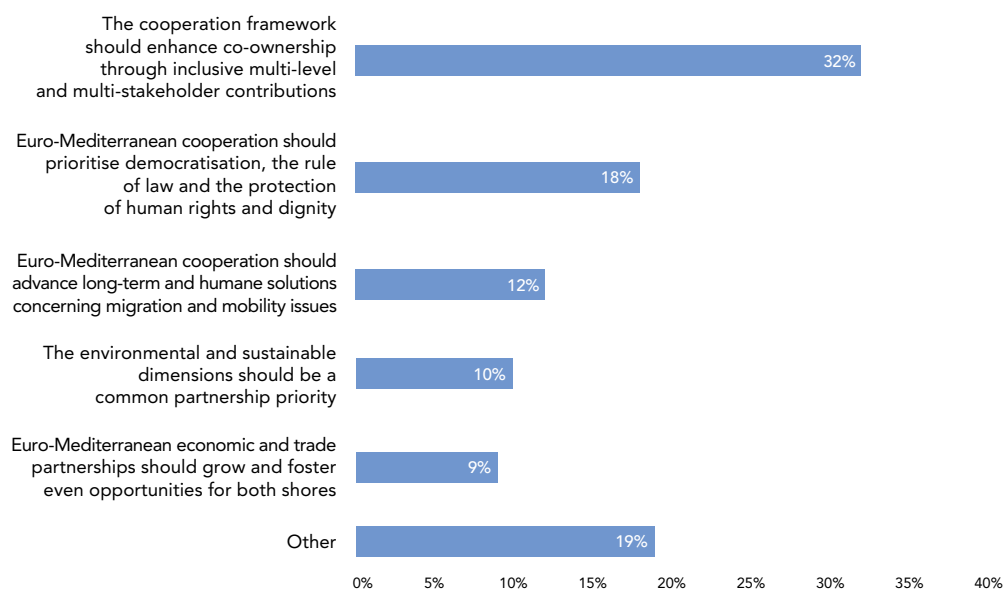
The inclusion of Israel in EU programs allow Israelis to be exposed firsthand to EU institutions and people, thus mitigating a popular notion in Israel (within selected socioeconomic communities) that the EU is not to be considered as an honest broker player.

— Israeli respondent

Through **Question 8**, respondents were given the possibility to indicate which changes could be implemented by 2030 to be able to assess that the Euro-Mediterranean cooperation has delivered.

As for the previous question, the overall results revealed a clear tendency in favour of one category amongst those developed based on the open-ended answers. Indeed, approximately one third of all respondents (32%) assessed that the cooperation framework should enhance co-ownership through inclusive multi-level and multi-stakeholder contributions.

**Graph 14:** Q.8 What should change by 2030 in order for you to assess that the Euro-Mediterranean cooperation has delivered? (Categories developed from the open-ended answers)

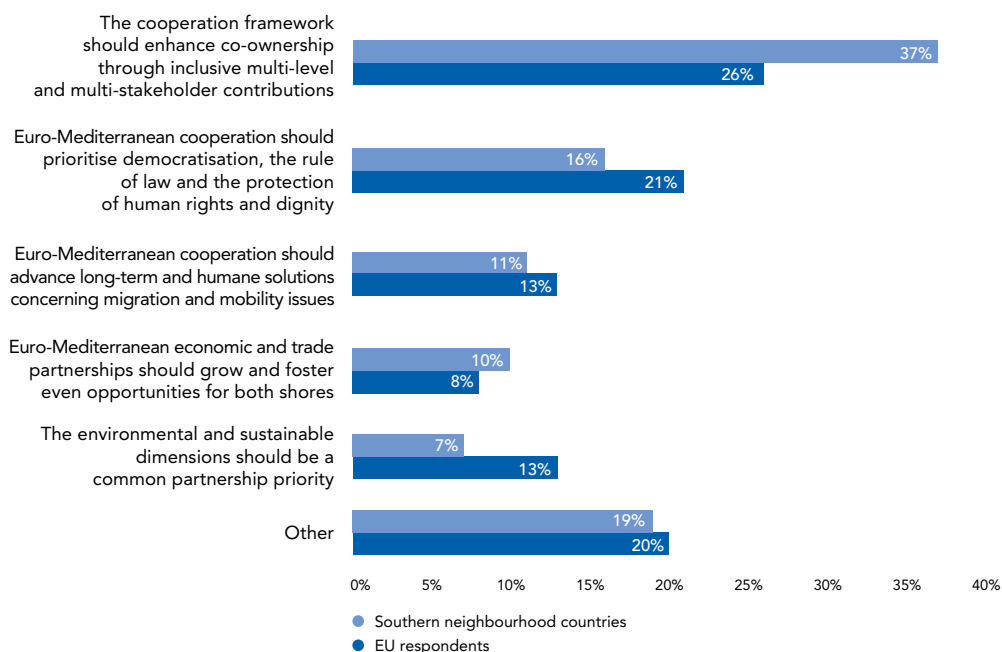


Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

This assessment was more pronounced amongst answers from southern neighbourhood respondents than amongst answers from EU country participants.

Regarding other categories, the proportion of answers between both shores differed only slightly. However, it is worth noting that respondents from EU countries deemed that the environmental and sustainable dimensions should be a common partnership priority almost twice as much (13%) as southern neighbourhood country respondents (7%).

**Graph 15: Q.8 What should change by 2030 in order for you to assess that the Euro-Mediterranean cooperation has delivered? (Categories developed from the open-ended answers)**



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

Some answers highlighted the need for the EU to reaffirm its action as a regional bloc:

The EU institutions at their top level should develop a strategy toward the Euro-Mediterranean region that responds to the superior interest of the Union, and not to those of the single member states. The way the EU has acted in helping negotiate the nuclear deal between Iran and the USA should serve as a reference.

— Italian respondent

Bien entendu, la géographie et l'histoire régissent les relations entre les deux rives. N'oubliez pas que les intérêts communs sont grands et nombreux, que ce soit en matière d'énergie (pétrole et gaz), de lutte contre le terrorisme et l'extrémisme, le commerce et les échanges économiques. Demeure aussi la nécessité aussi pour l'UE d'affronter d'autres blocs dans le bassin méditerranéen, caractérisés notamment par la présence russe, chinoise, voire américaine.

— Hashemite University - International Relations and Strategic Studies Program

Others hinted at the multidimensional nature of the change to be implemented, insisting particularly on the improvement of perspectives for youths and diverse actors:

A more equitable development platform that can generate deliverables to the target populations. For instance, investing in youth projects should be followed by investor fairs and opportunities in home countries rather than simply forcing brain-drains of talented youths in MENA to Europe.

— Luxembourg respondent

By 2030, the cooperation should ensure that funds are getting to the right parties who are transparent and who like to see achievements on the ground. Also, much more accountability to government institutions on the use of such funds. The EU should better identify who are the private institutions and groups that deliver on objectives and forge medium and long-term agreements to achieve results.

— Institute of the Environment - University of Balamand

# Human Development, Governance and Migration

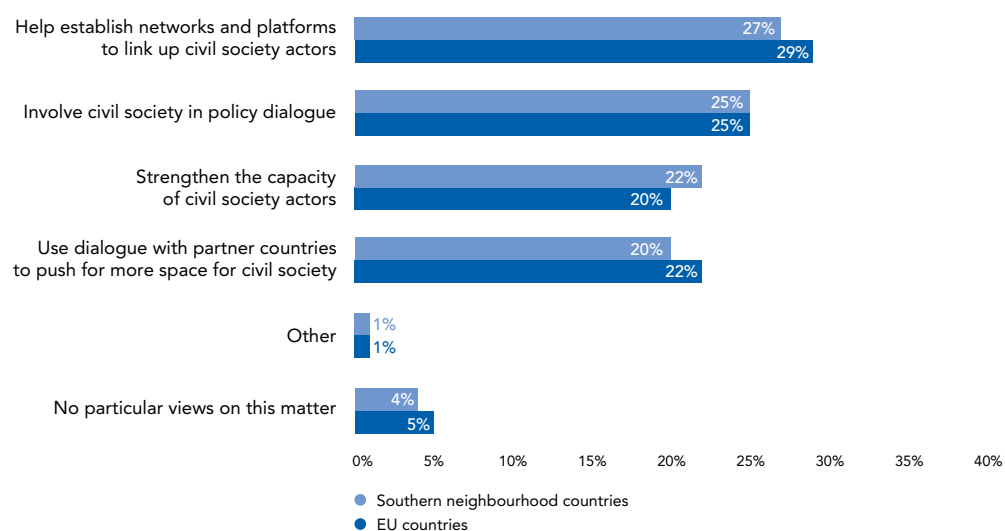
Questions 9 to 11 aimed to assess the respondent's perceptions of the EU's action in terms of supporting civil society democracy and good governance, human rights, as well as implementing external aspects of its New Pact on Migration and Asylum.

## Main findings:

- EU support for civil society should be mainly focused on establishing networks and platforms linking up civil society actors, according to a majority of respondents, who also recognise the importance of involving civil society in policy-making.
- In order to support reforms in the fields of good governance, a majority of European respondents think that the EU should be more assertive and make use of conditionality, a method that is also supported by a significant number of respondents from southern neighbourhood countries. However, the latter are more prone to considering that this result would best be achieved through enhanced engagement with civil, economic and social actors.
- Concerning the priorities of the external dimension actions outlined by the New Pact on Migration and Asylum, respondents clearly agree that building economic opportunities and addressing root causes of irregular migration should be the top priority.

**Question 9** proposed several options by which the EU could further support civil society to fully play its role. Answers show limited variation among the four options, with no significant differences between northern and southern respondents. A majority of respondents were of the opinion that “helping to establish networks and platforms to link up civil society” actors would be the best option for the EU to continue supporting civil society. Echoing other results of the Survey related to inclusive policy processes, more than a quarter of respondents also identified the “involvement of civil society in policy dialogue” as their top option (see graph 16).

**Graph 16: Q.9 What could the European Union do to further support civil society in Southern Mediterranean Countries in fully playing its role? (Ranked as first option)**

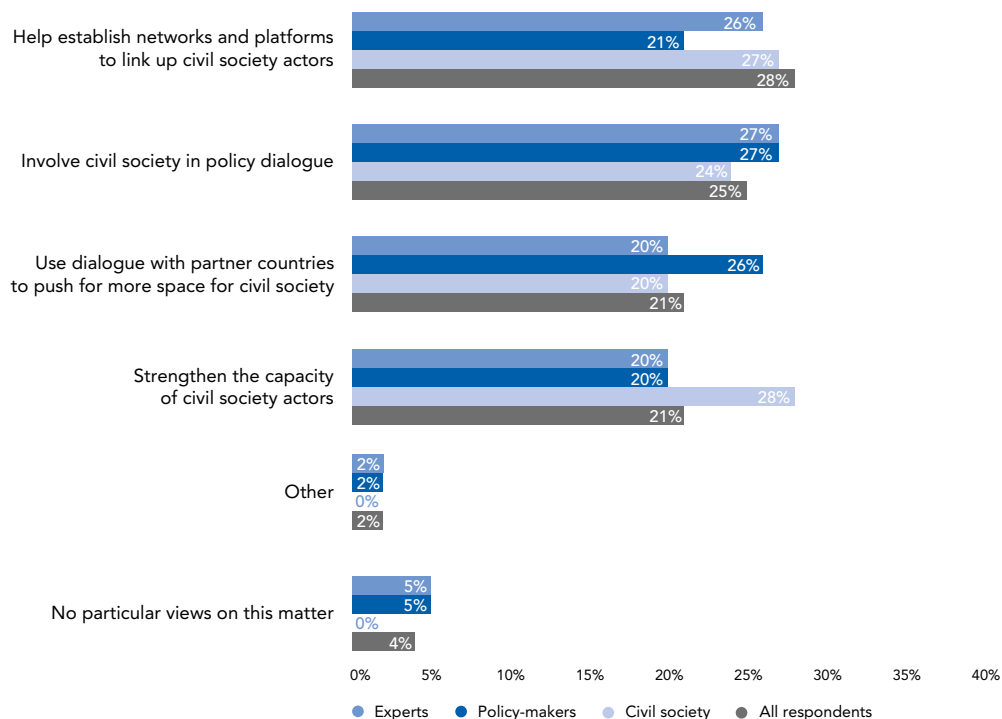


Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

In a regional breakdown of answers from southern neighbourhood respondents, Mashreq respondents prioritise the involvement of civil society in policy dialogue (31%), while Maghreb respondents prioritise the establishment of networks and platforms.

In turn, there is more variation according to the professional affiliation of respondents. Civil society respondents were more prone to identify “strengthening civil society actors’ capacities” as their top option, while, rather predictably, policy-maker respondents considered that the priority should be to involve civil society in policy dialogue (see graph 17).

**Graph 17: Q.9 What could the European Union do to further support civil society in Southern Mediterranean Countries in fully playing its role? (Ranked as first option)**



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

In the open comments, some respondents elaborated on the sequence between these options, and in particular the importance of empowering civil society organisations (CSOs) as a required step to fully contribute to policy dialogue:

The dialogue should be established between the civil societies and the policy-makers of the relevant countries without interference or supervision of the EU. That is why the EU must empower and strengthen the capacities of the civil societies first so they can be involved in a policy dialogue.

— Algerian respondent

Strengthening the capacity of civil society actors is the most important as all other issues derive from it, such as establishing networks, or involving civil society in policy dialogue.

— Belgian respondent

Comments also reflected how platforms and dialogue can help to improve the role of civil society:

It's a delicate matter, and pushing for dialogue per se with countries will not possibly have the expected outcome. The impulse needs to also come from the bottom and through specific joint initiatives that can gradually change processes and mindset, empower key actors, etc. This is to generate gradual and peaceful changes rather than revolutions.

— Italian respondent

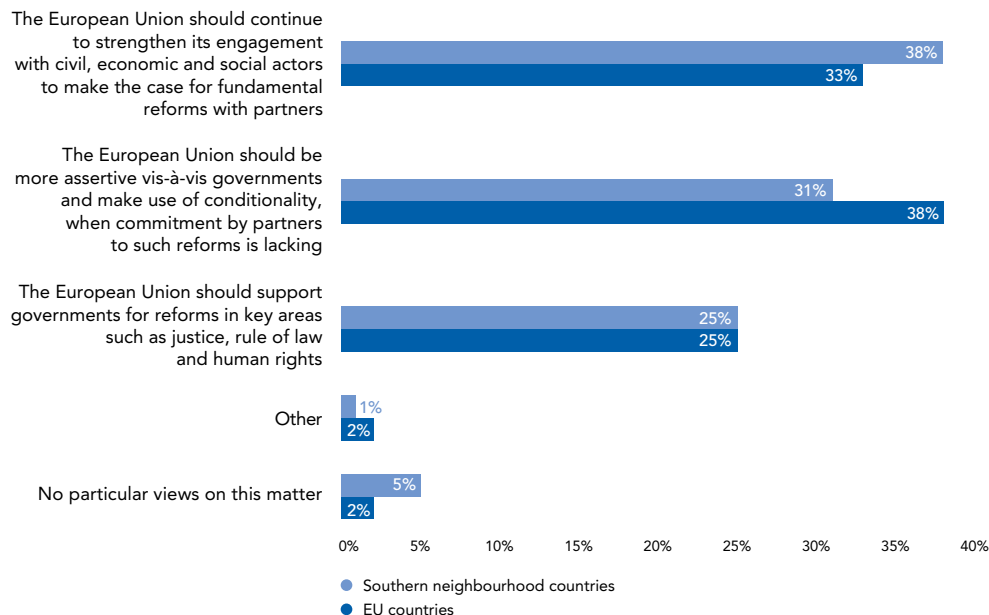
Establishing platforms bringing together civil society representatives from both shores of the Mediterranean and consulting them systematically can help develop ownership, address joint concerns and design joint strategies (e.g. Majalat project). The dialogue with partner countries can indeed be used to push for more space for civil society, but this should be done by 'walking the talk', i.e. condition support on respect for human rights and protection of this space – in law and practice.

— EuroMed Rights

**Question 10** was focused on how to support reforms in the fields of good governance, democracy, the rule of law and human rights. The three options proposed related to different engagement modalities, ranging from the use of conditionality when reforms are lacking to direct engagement with civil, economic and social actors.

The majority of respondents from southern neighbourhood countries chose as first priority that the EU should enhance its "engagement with civil, economic and social actors to make the case for fundamental reforms with partners". The majority of EU respondents prioritised the use of conditionality to foster partner countries to commit to reforms on good governance, democracy, the rule of law and human rights, while the majority of southern neighbourhood respondents prioritised the engagement with civil, economic and social actors (see graph 18). A southern neighbourhood breakdown shows that Mashreq respondents consider conditionality (39%) as important as the engagement with civil and social actors (39%), while Maghreb ones clearly prioritise the latter (42%).

**Graph 18: Q.10** When it comes to supporting reforms in the fields of good governance, democracy, the rule of law and human rights (Ranked as first option)



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

A breakdown of results by professional affiliation shows that 26% of civil society respondents identified the use of conditionality as the best avenue for the EU to pursue in order to support reforms in the field of governance, democracy, the rule of law and human rights. Meanwhile, 48% of respondents favoured engagement with civil, economic and social actors.

Open comments introduce interesting insights into how to operationalise the principle of conditionality and articulate it with other actions.

I do not see any importance to European conditionality, and up to the present time the European Union has not been able to use this tool effectively in light of its double standards, and the influence and emergence of international and regional actors that can offset European support, especially the Gulf states and China, which will be reflected in European policies in the future.

— Algerian respondent

This is an impossible choice to make between these different options, as they are intertwined and reinforce each other. They can be related in a sequence: (1) the EU strengthens its engagement with independent civil, economic and social actors, (2) taking civil society views into account, the EU supports governments for reforms in key areas such as justice, rule of law and human rights, (3) if this soft power approach does not work, the EU is more assertive vis-à-vis governments and makes use of conditionality.

— EuroMed Rights

We believe that the three options referred to can be used at the same time, according to each individual case and according to the issues raised. In some cases, government support is necessary for introducing reforms in the areas of justice and rule of law. In other cases, it may be indispensable to benefit from conditionality when partners are less committed to reforms.

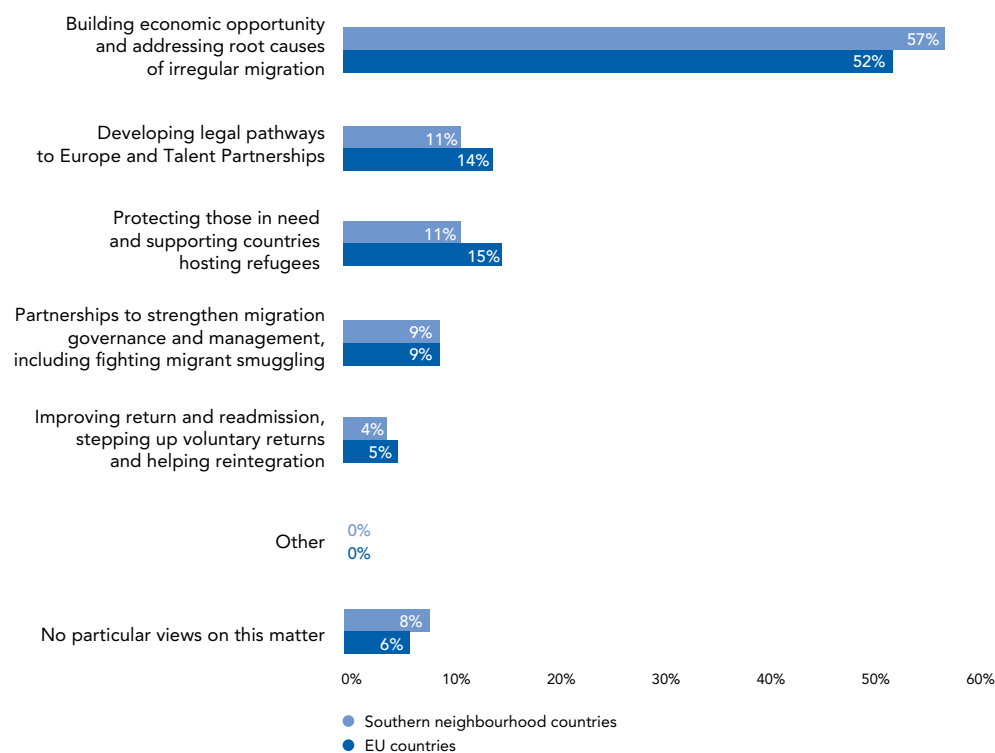
— Egyptian Council for Foreign Affairs

While emphasizing the importance of always supporting drivers of change, it is necessary to decisively support reforms in terms of governance that make change possible. Instruments such as the 2030 Agenda can be deployed as agents of change, rather than conditionality or changes at the level of institutions that can be sterile.

— Spanish respondent

**Question 11** aimed to assess the perceptions in relation with the five priorities for action on the external dimension outlined by the New Pact on Migration and Asylum presented by the EU in September 2020. Respondents unequivocally agreed that building economic opportunities and addressing root causes of irregular migration was the most important pillar (see graph 19).

**Graph 19: Q.11 Most important external dimension actions of the New Pact on Migration and Asylum (Ranked as first option)**



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

The dispersion of answers between EU respondents and respondents from the southern neighbourhood was rather limited. The percentage of respondents from southern neighbourhood countries choosing “building economic opportunities and addressing root causes of irregular migration” as their top option was five points higher than for EU respondents, reaching up to 65% in the case of Maghreb respondents. In turn, EU respondents were slightly keener on referring to legal pathways or to the protection dimension as their top priority.

A number of respondents formulated concerns about how the external dimension of migration management is conceived:

Des préoccupations existent quant à l'externalisation accrue du contrôle aux frontières et de la gestion des migrations. Cette situation ne peut que conduire à une augmentation des violations des droits de l'homme. En effet, la « coopération extérieure » de l'UE sur les questions de migration avec des pays tiers a lieu dans des pays qui ne disposent pas d'un cadre efficace pour la protection des droits des personnes en déplacement, comme la Turquie ou la Libye.

— Majalat project

It is not sufficient to subcontract transit countries, or to externalise migration policies, or to create hot spots and to harmonize asylum policies. The EU should, in partnership with the Arab League and the African Union, translate the Malta migration recommendations into concrete actions, mainly be devising, inclusive economic policies and co-development strategies.

— Belgian respondent

Other comments elaborated on the need to think about causes of migration from a more complex and global perspective and more generally to reassess the link between various paradigms (migration and root causes, on the one hand, development and talent partnerships, on the other):

Building economic opportunity and addressing root causes is essential, but it is not helpful to link it so directly to migration and asylum. It is necessary for other reasons – to promote energy transition, manage the impact of climate change, reduce security challenges and more.

— Swedish respondent

Il est regrettable dans les discours de l'UE d'associer le développement de la migration légale à l'attirance des talents, ce qui est en contradiction flagrante avec les objectifs de développement de ces pays qui ont plus que jamais besoin de leurs talents pour la mise à niveau de leurs économies.

— Moroccan respondent

Legal pathways should concern broader population strata than simply “talent partnerships”. People have transnational families, friendships, etc.

— Tampere Peace Research Institute

# Inclusive, Resilient and Sustainable Economies

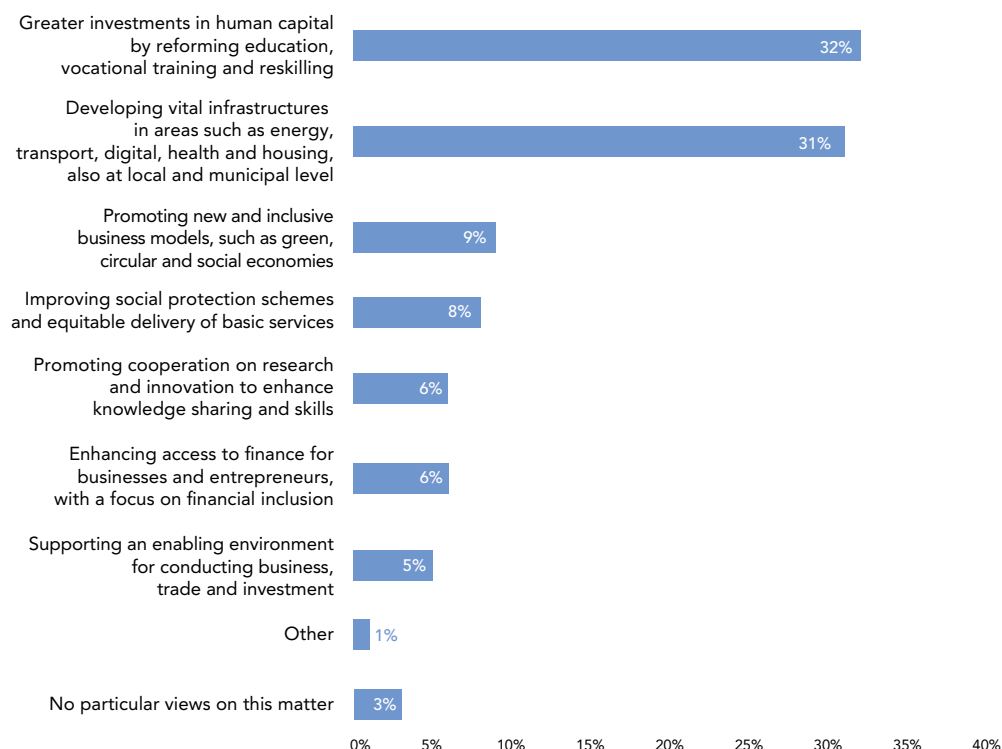
This section of the EuroMeSCo Euromed Survey was mainly focused on how to face the socioeconomic challenges of southern neighbourhood partner countries, in particular in the post Covid-19 context, in order to foster inclusive, resilient, sustainable and connected economies.

## Main findings:

- Fostering inclusive economies can be best achieved through a combination of reforms in the field of education, vocational training and re-skilling, with the development of vital infrastructures (such as energy, transport, digital, health and housing).
- A comprehensive recovery plan requires, as a matter of priority, an effort to reform public finances of southern neighbourhood countries. Grants and macro financial assistance are also seen as important, in support of these reforms, to boost the recovery of these countries.
- According to respondents, a key element to stimulate trade relations between the EU and its southern partners should be deepening regional economic integration.
- “Enhance access markets by including services and investment” is also seen as crucial to stimulate regional trade by southern neighbourhood respondents, while “better use of agreements already in place” would be more important according to EU respondents.
- A clear majority of respondents considered that EU Foreign Direct Investment (FDI) should be focused on investments yielding a positive impact on job creation and contributing to sustainable development.
- To effectively support a digitalisation agenda in the southern countries, the EU should first support the adaptation of education and vocational training.

**Question 12** turned to the effective ways to foster more inclusive economies in the southern neighbourhood countries. Out of the seven options, respondents considered investments in human capital, i.e. reforming education, vocational training and re-skilling, as first priority, closely followed by developing vital infrastructures (such as energy, transport, digital, health and housing) while the remaining options had a lower percentage of answers (see graph 20).

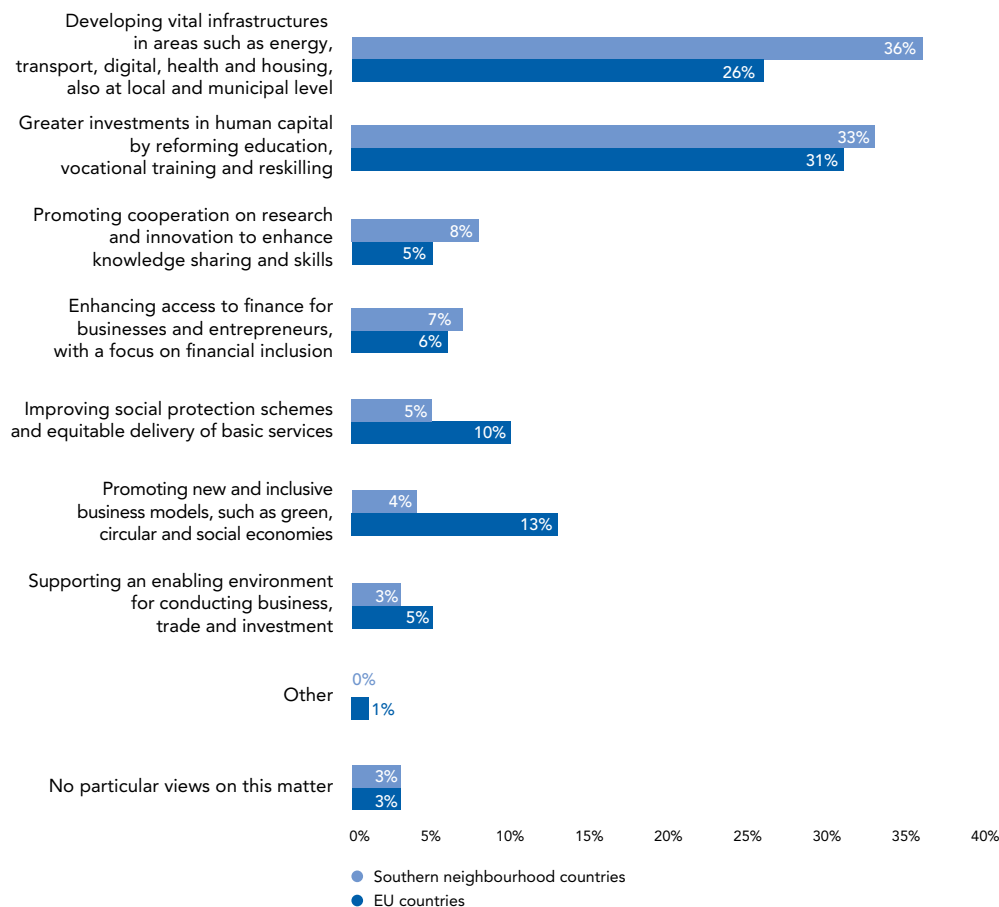
**Graph 20:** Q.12 Most effective ways to foster more inclusive economies in the southern neighbourhood countries (Ranked as first option)



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

A breakdown of answers shows a number of different patterns. More than a third of southern neighbourhood respondents ranked in first position the development of vital infrastructures, 10 percentage points more than EU respondents. In turn, the first priority for EU respondents was investments in human capital. In the case of “promoting new and inclusive business models, such as green, circular and social economies”, EU respondents tripled the percentage of southern ones and doubled in the case of “improving social protection schemes and equitable delivery of basic services” (see graph 21).

**Graph 21: Q.12 Most effective ways to foster more inclusive economies in the southern neighbourhood countries (Ranked as first option)**



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

Some open comments to Q.12 cast light on the nexus between inclusive growth and good governance:

It can be noted that economic difficulties are an underlying concern of citizens of the southern neighbourhood, as recent protests in Tunisia in January 2021 show. From a human rights and rule of law perspective, fighting corruption, for instance, is key in fostering resilient and sustainable economy, since this phenomenon undermines good governance and hinders economic development.

— French respondent

The EU considers the private investors as the engine of inclusive growth, decent job creation, efficient provision of public services and goods. Nevertheless, the lack of any mechanism enhancing transparency, accountability and responsibility is the main challenge in this regard.

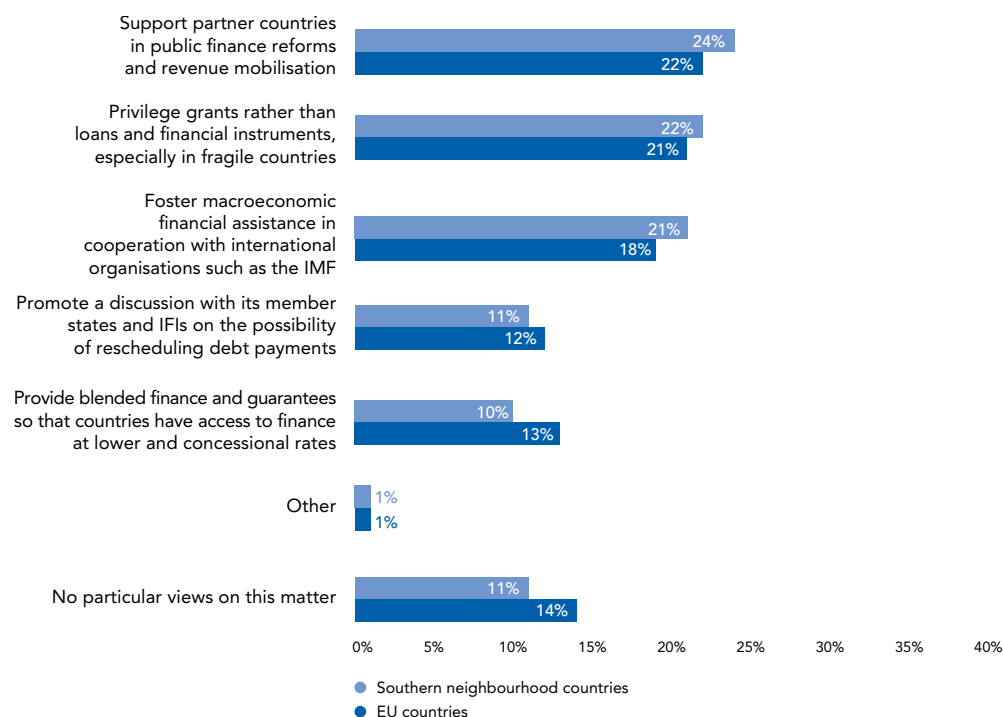
— Arab NGO Network for Development, Lebanon

Inequalities stem primarily from differential access to opportunities. To re-establish the capacity of societies to provide equal opportunities to their citizens, functional service provision is an overarching condition but needs to be accompanied by effective policies limiting rent-seeking and power grabbing by elites.

— Italian respondent

**Question 13** dealt with EU priorities to develop a comprehensive recovery plan and confront new challenges in southern neighbourhood countries. The most popular option among respondents relates to the role of the EU in supporting public reforms and revenue mobilisation in southern neighbourhood countries. Close behind are two options referring to EU financial assistance mechanisms.

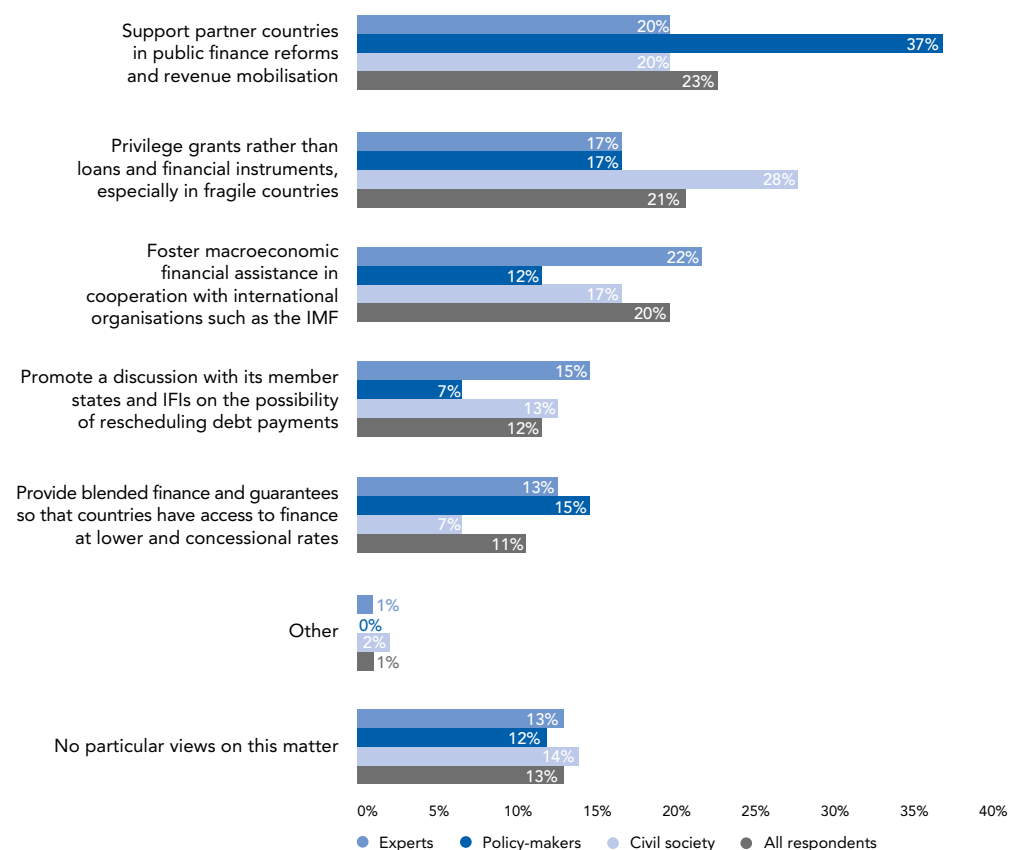
**Graph 22: Q.13 European Union priorities to develop a comprehensive recovery plan and confront new challenges in Southern Mediterranean Countries**  
(Ranked as first option)



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

While there are no major differences between the patterns of answers from respondents from the EU and from southern neighbourhood countries, a breakdown by type of institutions reveals a greater dispersion of answers (see graph 23). 37% of the policy-makers taking part in the Survey chose “support partner countries in public finance reforms and revenue mobilisation” as their first option. In turn, the first option for almost one third of civil society respondents was “privilege grants rather than loans and financial instruments, especially in fragile countries”. The patterns of the answers from experts (academic, think tank and media) are closer to the average results, although the top answer was “foster macroeconomic financial assistance in cooperation with international organisations such as the IMF”.

**Graph 23: Q.13 European Union priorities to develop a comprehensive recovery plan and confront new challenges in Southern Mediterranean Countries**  
(Ranked as first option)



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

Very consistently with other results of the Survey, in their comments respondents reiterated the necessity to fight corruption as a requirement to make the recovery possible and sustainable, and encourage the EU to be very cautious when providing assistance:

Any further financial assistance to governments should be assertively conditional on reform and extremely tight auditing, otherwise it not only helps finance corrupt political leadership but also blocks the way before any reforming agents.

— Daraj (independent digital media platform), Lebanon

The EU has to stress the fight of corruption and transparency to assure these financial supports, and that grants will be implemented in specific sustainable projects. Corruption is the major issue in the southern countries, which impedes realizing a great development.

— Algerian respondent

Some respondents were even more specific in this regard, inviting the EU to concentrate its support on local governments and civil society:

Financial support needs to reach private sector and local government not through central government – as most are ridden by inefficiencies. Capacity-building on tracking finance against private sector projects and local government projects is needed.

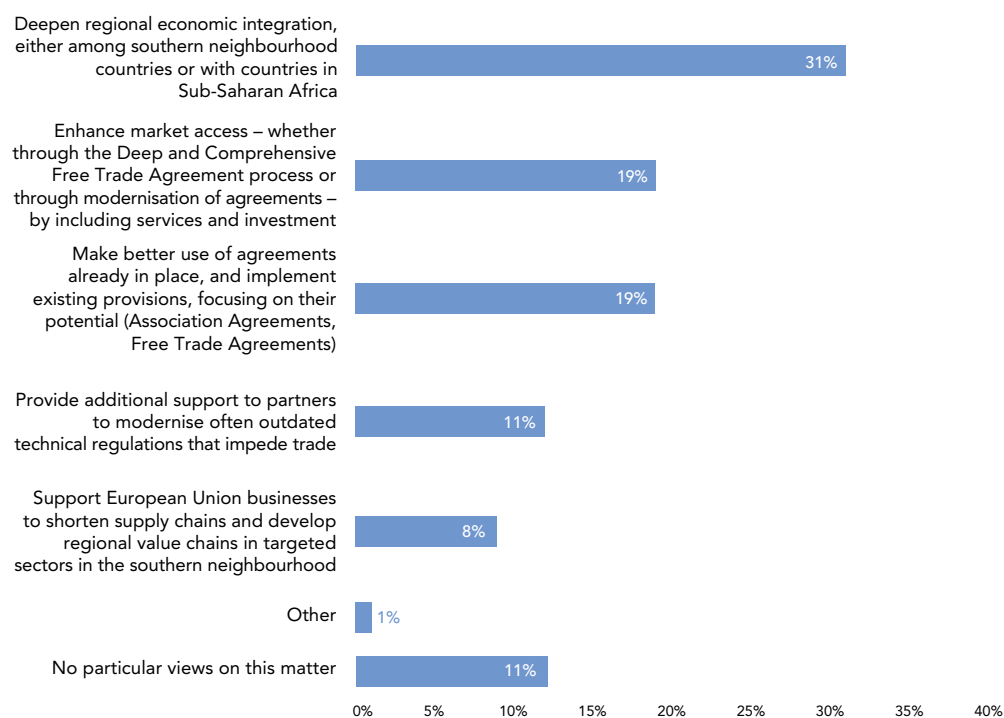
— The Mediterranean Growth Initiative / ELIAMEP

Allocate grants and budgets for civil society organisations to take part in the development of economic reforms in the states. Civil society support is very important to guarantee transparency and accountability by the governments.

— Palestinian Center for Media, Research and Development

**Question 14** was focused on what should be done to stimulate trade relations between the EU and its southern partners. Out of the five possible options, nearly one third of participants were of the opinion that this would be achieved through a deepening of regional economic integration, either among southern neighbourhood countries or with countries in sub-Saharan Africa.

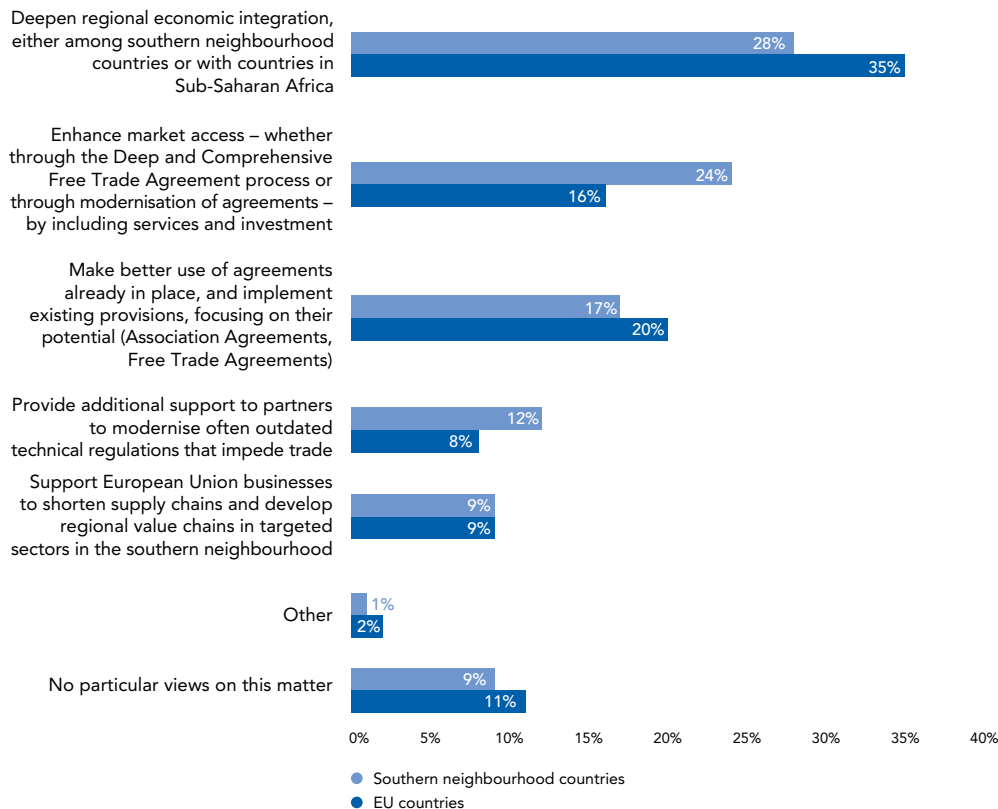
**Graph 24:** Q.14 What should be done to stimulate trade relations between the European Union and its southern partners? (Ranked as first option)



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

Results broken down according to the geographical origin show a slightly nuanced picture (see graph 25). Respondents from southern neighbourhood countries are less keen than their southern counterparts to “make better use of agreements already in place” and keener on “deepening regional integration...” or “enhance market access” (their second most frequently identified option as number one).

**Graph 25: Q.14 What should be done to stimulate trade relations between the European Union and its southern partners? (Ranked as first option)**



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

Open comments mentioned the importance of considering coherence and fairness in trade agreements:

Increase and deepen first sub-regional integration (Maghreb) then regional integration (Arab Free Trade Zone) and encourage triangular integration (EU-Arab Countries-African Union). It is not necessary to create new mechanisms or organisations or fora. Just improve the performance of those in existence. Free trade agreements with the EU should be encouraged with safeguards for the less-developed economies. Offshoring some European industries in the southern region creates prosperity and stability in the region and prosperity and security in Europe.

— Belgian respondent

Les accords de libre-échange proposés laissent les pays du Sud dont les économies sont fragiles incapables de faire face à la concurrence des économies européennes.

— Moroccan respondent

The EU should be able to convince (reluctant) member states to offer increased trade preferences to southern neighbours (notably by softening its rules of origin restrictions) and envision for the medium term the creation of a common trade and investment area with the South. This would unlock a huge development and investment potential that would create the platform for future investments by joint EU-southern neighbours companies in the sub-Saharan African market.

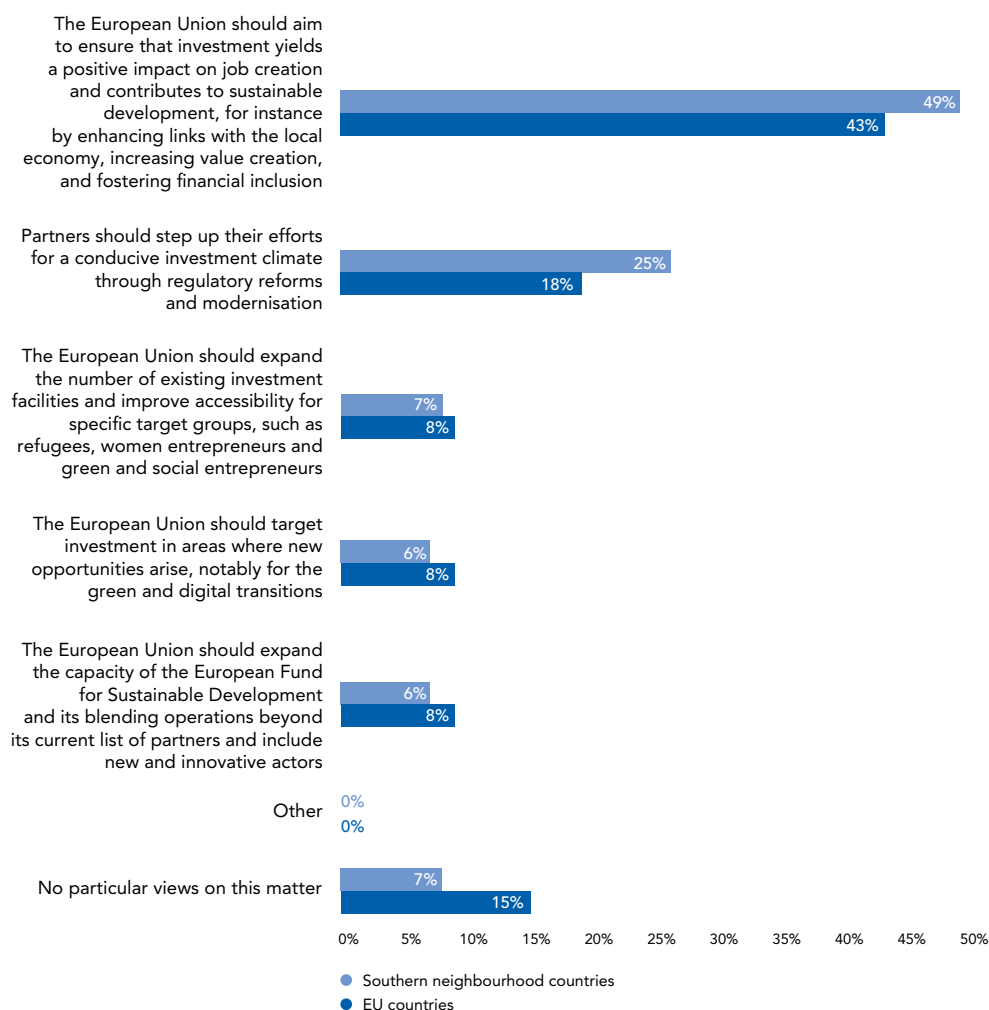
— Italian respondent

Policy coherence for development is a legal obligation for the EU according to article 208 of the Lisbon Treaty. Particularly important in this regard are EU trade and investment policies that should have clearly defined development objectives through contributing to development of productive sectors and employment generation. In this context, stimulation of trade initially requires ex-ante and ex-post rights-based and sustainability impact assessments. It is important to note that the other priorities listed (including DCFTAS, EU businesses engagement, etc.) have been criticized and opposed by civil society groups in the region.

— Arab NGO Network for Development, Lebanon

**Question 15** proposed different options to boost EU FDIs in southern neighbourhood countries. Options ranked as first and second options concentrated a very significant percentage of answers. Almost half of respondents chose as their top option the answer referring to the objectives of FDIs (job creation and contribution to sustainable development). The second most frequently given option as the top answer was the creation of a favourable investment climate through regulatory reforms and modernisation.

**Graph 26: Q.15 What should be done to boost European Union Foreign Direct Investment to southern neighbourhood countries? (Ranked as first option)**



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

Open comments to the question introduced proposals on possible targets of EU direct investments:

Il faut envisager un appui fiscal aux entreprises qui investissent dans les pays de Sud, en particulier quand il s'agit d'activités économiques haut de gamme.

— Finnish respondent

As much as I am supportive of projects that prioritise empowerment of specific target groups including women, refugees, green and social entrepreneurs, I believe that such an outcome could be a natural result of a more strategic planning undertaken at a macro level.

— Daraj (independent digital media platform), Lebanon

Cooperation actors and regional authorities could support foreign direct investments through the mobilisation of their network of expertise in countries of the southern Mediterranean.

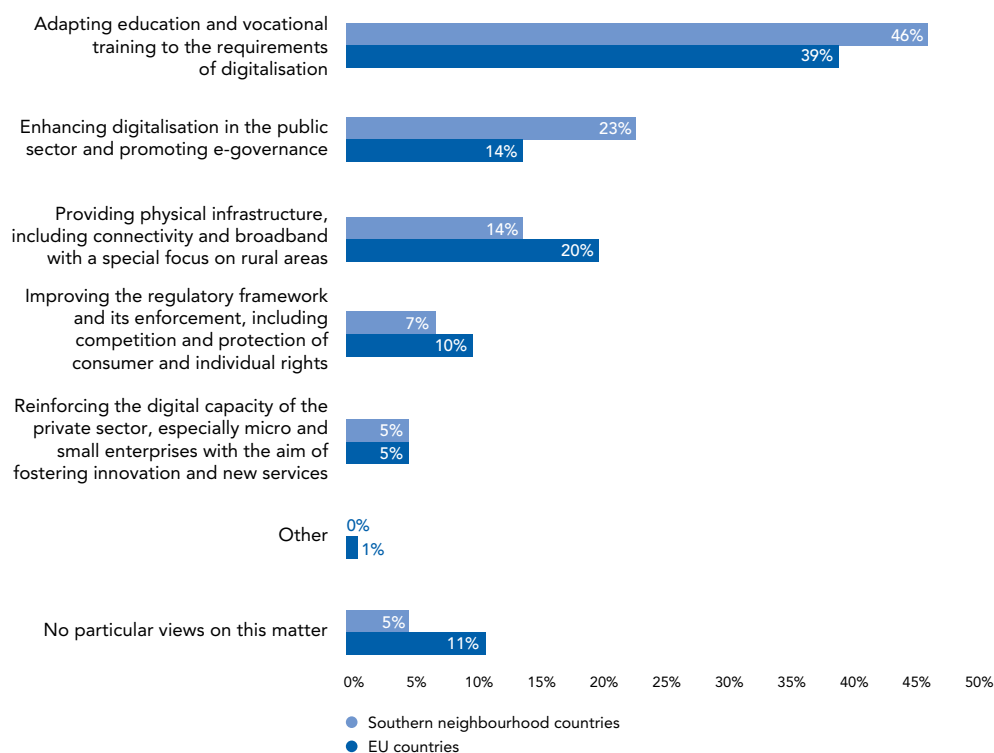
— Région Provence-Alpes-Côte d'Azur

It is important to note that priorities of blending should not be pursued, as pooling public resources and using ODA to subsidise private companies most often owned and domiciled in OECD countries would not bring additionality and address development needs of the partner countries.

— Arab NGO Network for Development, Lebanon

The final question of this section, **Question 16**, concerned how to effectively support a digitalisation agenda in the southern countries. “Adapting education and vocational training” was the first option chosen, doubling the percentage of answers of “digitalisation in the public sector and promoting e-governance”, which was the second. However, the second option for respondents from EU countries was different. In this case it was “providing physical infrastructure, including connectivity and broadband with a special focus on rural areas”, an option that came third among southern neighbourhood respondents (see graph 27).

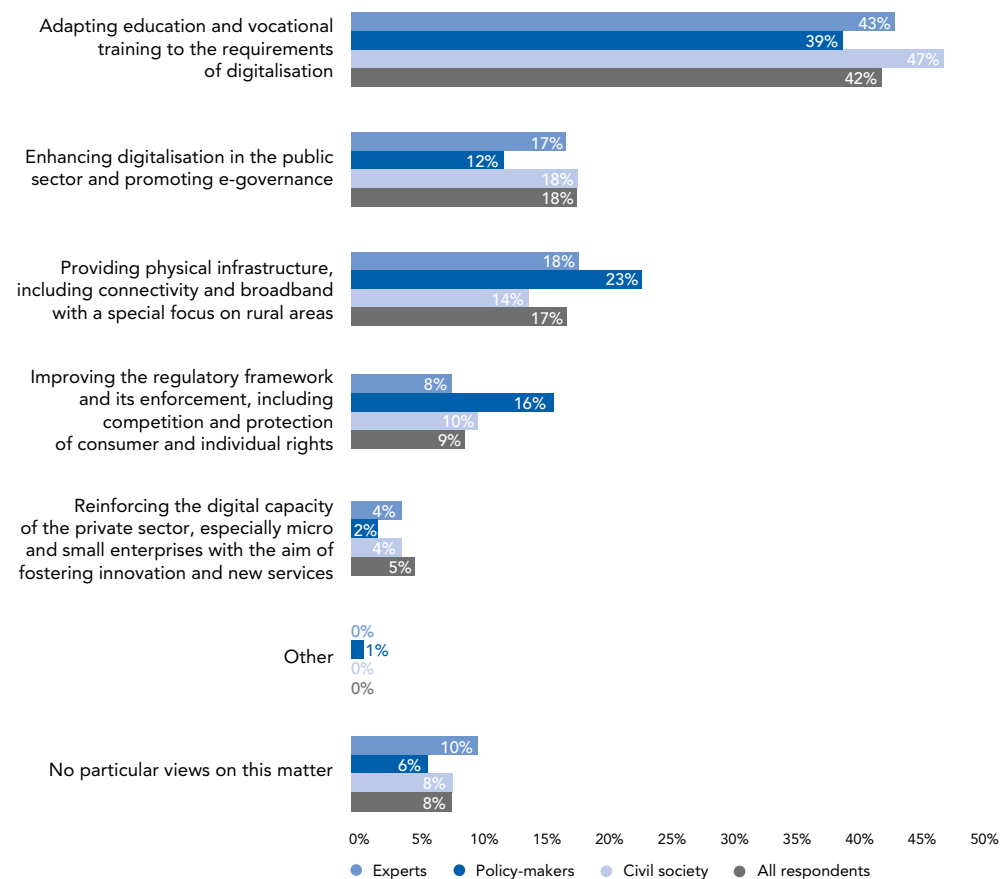
**Graph 27: Q.16 Most effective ways to support a digitalisation agenda in the southern neighbourhood countries? (Ranked as first option)**



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

A breakdown of answers by institutional affiliation shows that policy-makers ranked “providing physical infrastructure” in second place and “improving the regulatory framework” in third place. These percentages are quite differentiated from the rest of the answers (see graph 28).

**Graph 28: Q.16 Most effective ways to support a digitalisation agenda in the southern neighbourhood countries? (Ranked as first option)**



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

In their open comments, respondents stressed the importance of matching digitalisation with good governance:

Corruption is a big obstacle for digitization, especially in the public sector. Therefore, a successful digitalization goes in parallel with enhancing good governance.

— Lebanese respondent

The development of IT infrastructures should not lead to giving authoritarian regimes more power to tap into communications and monitor their populations, in particular rights defenders who dare speak out against human rights abuses.

— EuroMed rights

The EU should take into consideration the digital divide and preparedness of partner countries prior to promoting a digitalization agenda. Giving an immediate role to private sector without transparency and monitoring mechanisms and without ensuring safeguards for protection of human rights would endanger outcomes. In this context the EU should establish a regional hub bringing together civil society, academia, private sector and partner countries that undertakes a mapping and an overview of digital solutions in the southern partner countries.

— Lebanese respondent



# Environment, Energy and Climate Change Resilience

This section of the EuroMeSCo Euromed Survey aimed to assess respondents' top priorities on policies to be implemented in order to support the energy transition in southern neighbourhood countries and on measures to address climate and environmental change in the Mediterranean region.

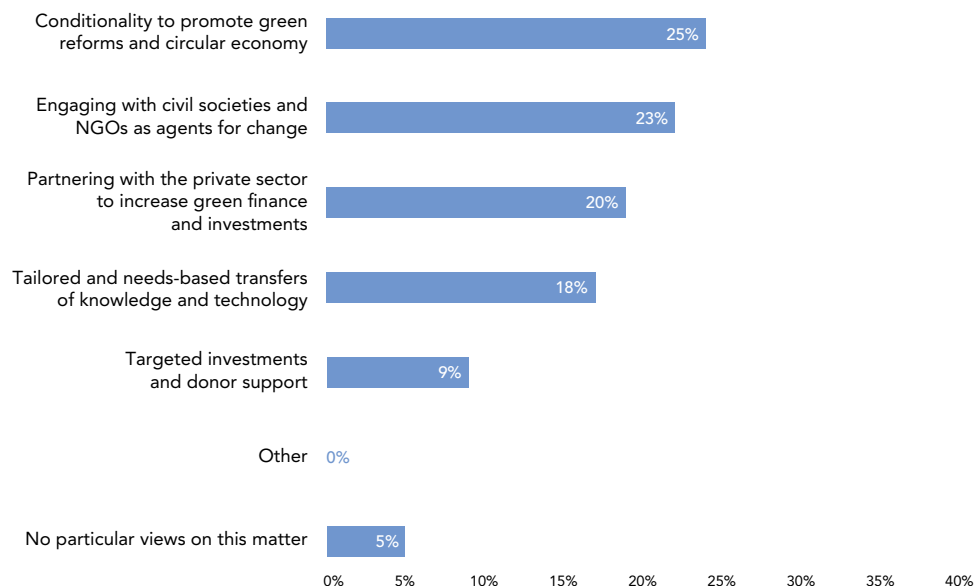
## Main findings:

- A significant number of respondents think that conditionality to promote green reforms and circular economy is the most efficient measure that could support the green transition in southern neighbourhood countries.
- When coming to the role of the EU in accompanying the energy transition in southern neighbourhood countries, a majority of respondents believe that the EU should concentrate on smaller-scale and more centralised projects.
- Respondents mostly agree on the need to integrate approaches to promote sustainable water security as the top priority to address climate and environmental change in the Mediterranean region.

## Supporting the Green Transition in SEM Countries

**Question 17** invited participants to choose and rank their three preferred options out of five different ways to support the green and sustainable transition in the southern neighbourhood countries in terms of efficiency. A quarter of respondents (25%) chose conditionality to promote green reforms and circular economy as their first preference (see graph 29). The second and third options ranked as first preferences were engaging with civil societies and NGOs as agents for change (23%) and partnering with the private sector to increase green finance and investments (20%).

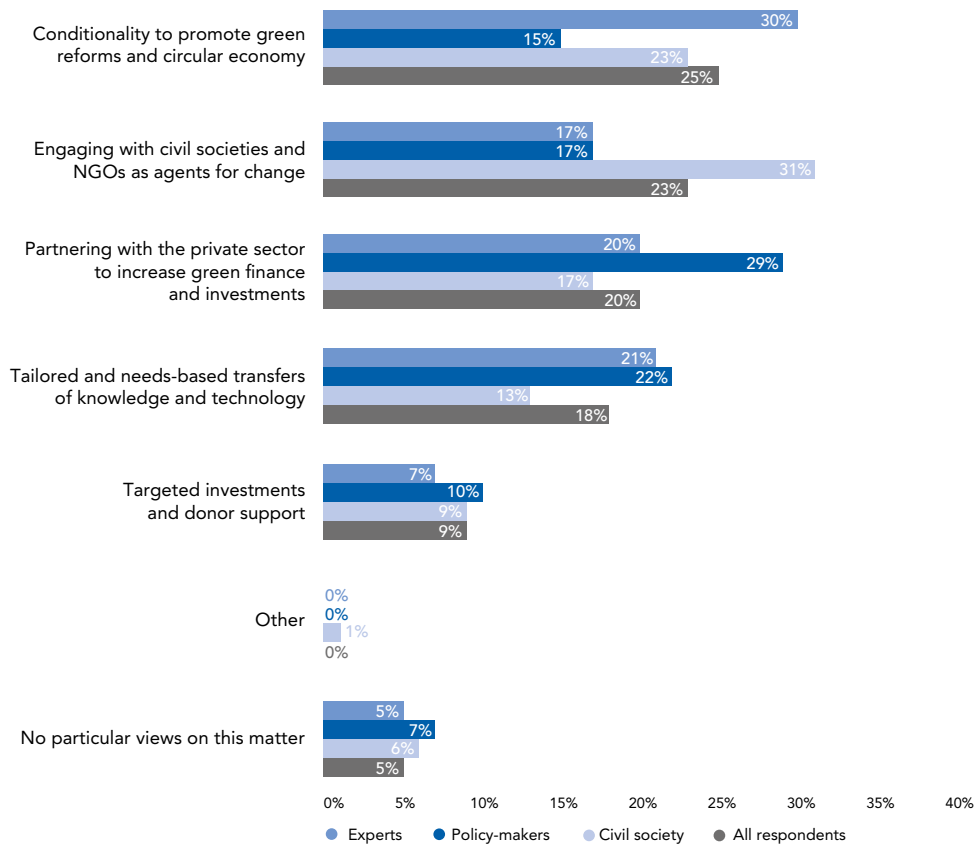
**Graph 29: Q.17 Effective ways to support the green and sustainable transition in the southern neighbourhood countries (Ranked as first option)**



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

It is worth mentioning that 30% of the experts responding to this question chose conditionality to promote green reforms and circular economy as their top priority, while only 15% of the policy-makers selected the same option as their favourite. Instead, 29% of the policy-makers chose partnering with the private sector to increase green finance and investments as their top priority. Lastly, 31% of respondents from CSOs selected engagement with civil society and NGOs as agents for change as their preferred option (see graph 30).

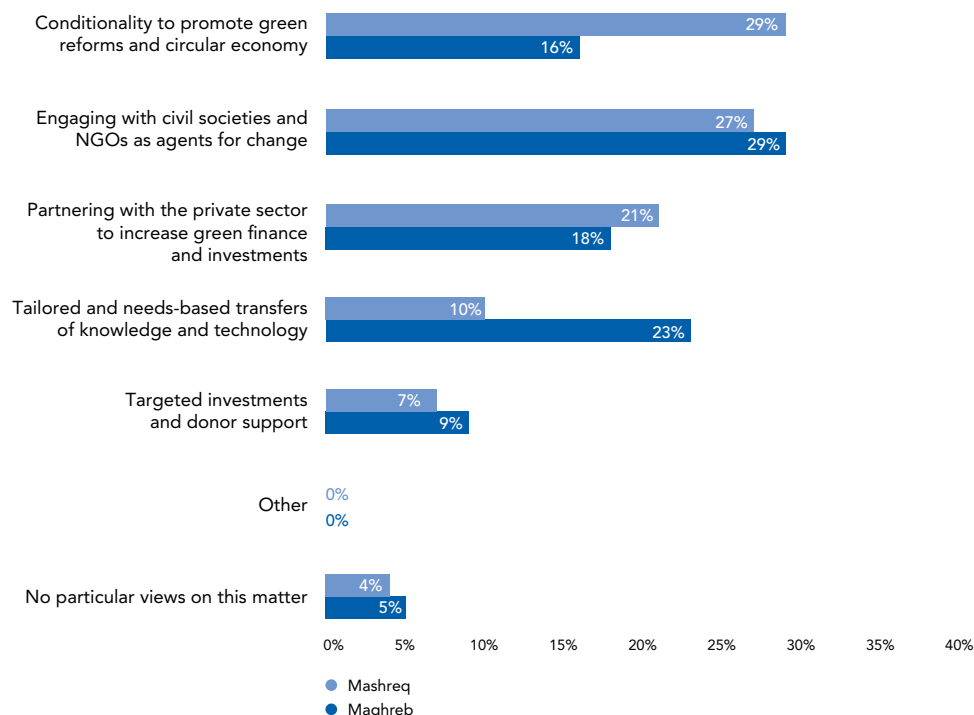
**Graph 30: Q.17 Effective ways to support the green and sustainable transition in the southern neighbourhood countries (Ranked as first option)**



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

Additionally, it is worth mentioning that almost 29% of respondents from Mashreq selected conditionality to promote green reforms and circular economy as their top priority, while only around 16% of respondents from Maghreb selected the same option as their preferred one (see graph 31).

**Graph 31: Q.17 Effective ways to support the green and sustainable transition in the southern neighbourhood countries (Ranked as first option)**



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

In open comments to these questions, some respondents expressed the view that the focus on the green transition in the southern neighbourhood was misplaced, while others stressed the importance of communication and awareness-raising:

I think there are more important problems than a green transition in the southern neighbourhood countries: education, health, economic and career opportunities. The focus on the green issue is misplaced.

— Institute for Growth and Fluctuations, University of Hamburg

En matière de transition écologique, la coopération de l'Union européenne avec ses voisins du sud devrait, en outre, porter sur la mise en valeur appropriée des terres arables grâce au savoir-faire technologique des pays d'Europe, la promotion de l'économie bleue qui peut constituer une source de richesse capitale et mettre, au-delà du voisinage sud de l'Union européenne, l'ensemble du continent africain sur la voie du développement durable.

— Institut Royal des Études Stratégiques (IRES)

Conditionality should come after a large awareness campaign with private and public stakeholders on the positive effects of greening the industry and means of implementation (including possible ad-hoc financial support).

— Italian respondent

Other comments focused on the role of civil society in supporting the green transition in the southern neighbourhood:

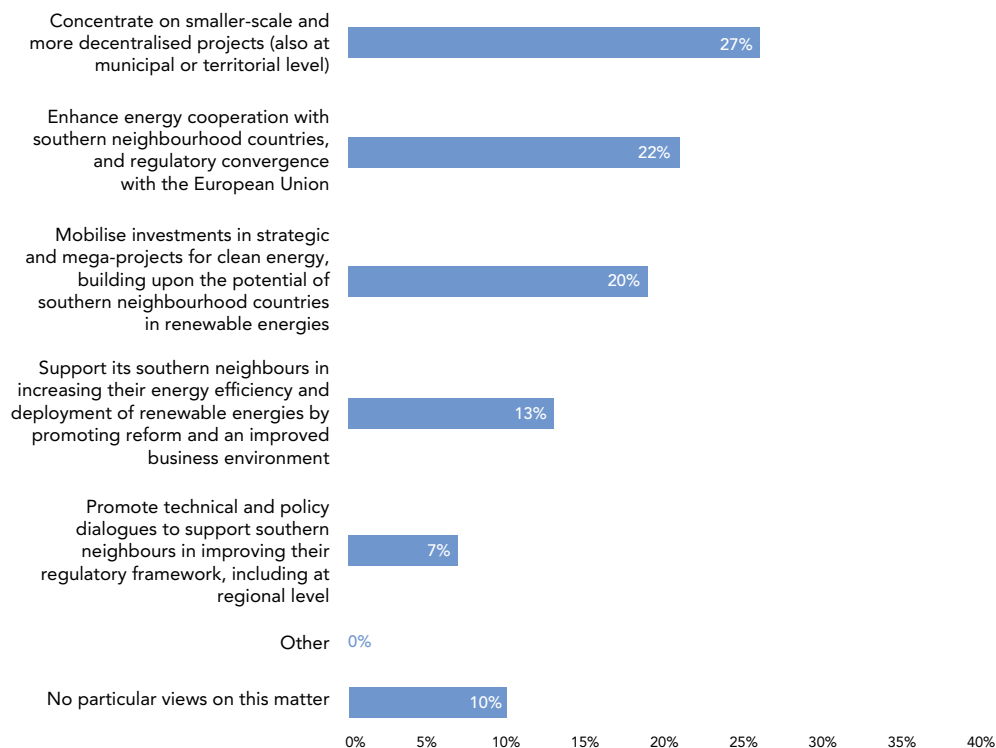
Local actors, including civil society and NGOs, are key partners and watchdogs for the EU to avoid greenwashing and misuse of funds earmarked for the green and sustainable transition.

— EuroMed Rights

## The Role of the EU in the Energy Transition of Southern Neighbourhood Countries

**Question 18** was designed to identify which actions the EU could consider to accompany the energy transition in southern neighbourhood countries. Participants were asked to choose and rank their three top preferences out of five different types of policies or actions. Slightly more than a quarter of respondents (27%) think that the EU should concentrate on smaller-scale and more decentralised projects (also at municipal and territorial level) as a top priority (see graph 32). 22% of participants, instead, believe that the EU should prioritise the enhancement of energy cooperation of southern neighbourhood countries and of regulatory convergence with the EU. In 20% of cases, respondents chose as their top preference mobilising investments in strategic and mega-projects for clean energy, building upon the potential of southern neighbourhood countries in renewable energies.

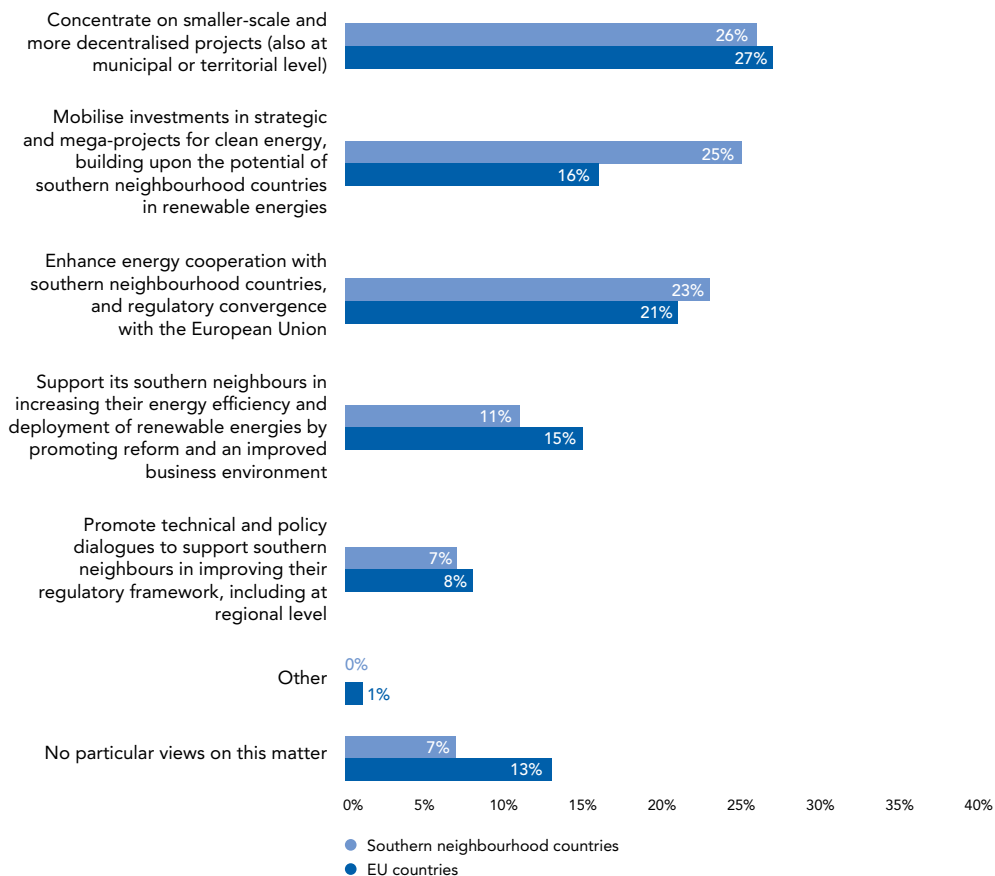
**Graph 32: Q.18 What should the European Union do to accompany the energy transition of the southern neighbourhood countries? (Ranked as first option)**



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

While more than 25% participants from both EU and southern neighbourhood countries chose the need to concentrate on smaller-scale and more decentralised projects as their first preference in a similar percentage, EU respondents are less prone than southern neighbourhood participants to consider the mobilisation of investments in strategic and mega-projects as their top priority (16% and 25%, respectively) (see graph 33).

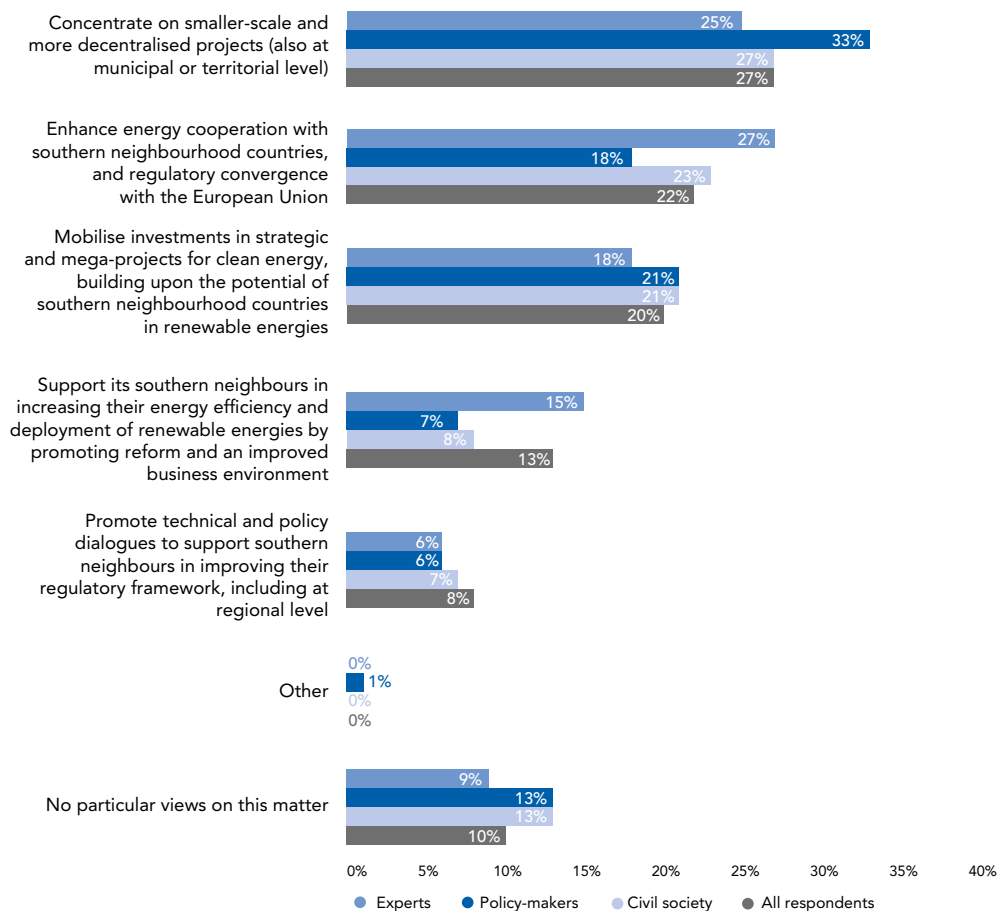
**Graph 33: Q.18 What should the European Union do to accompany the energy transition of the southern neighbourhood countries? (Ranked as first option)**



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

In addition, policy-makers appear to prioritise concentration on smaller-scale and decentralised projects in larger proportions than experts (33% and 25%, respectively), while experts prefer the option of enhancing energy cooperation with southern neighbourhood countries and regulatory convergence with the EU more than policy-makers (27% and 18%, respectively) (see graph 34).

**Graph 34: Q.18 What should the European Union do to accompany the energy transition of the southern neighbourhood countries? (Ranked as first option)**



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

In their comments, some respondents further elaborated arguments and proposals on the energy transition:

La transition énergétique des pays du voisinage sud devrait être abordée dans une approche collective, dans un cadre régional (voisinage sud) ou continental (Afrique). La coopération devrait alors porter sur l'accroissement des capacités du voisinage sud en matière de valorisation et d'utilisation rationnelle des ressources énergétiques locales, particulièrement les énergies renouvelables, notamment l'hydro-électrique, le solaire et l'éolien. Le développement des énergies renouvelables ainsi que l'amélioration de l'efficacité énergétique pourraient répondre à la fois aux impératifs de la transition énergétique en Europe et de la sécurité énergétique des pays du voisinage ainsi qu'aux exigences d'adaptation au changement climatique.

— Institut Royal des Études Stratégiques (IRES)

Les examens des feuilles de route des Organisations de la Société Civile (OSC) devraient mieux s'aligner sur les acteurs et les priorités des OSC en matière de climat et de justice sociale, et créer des synergies avec les stratégies par pays en matière de droits de l'homme, le plan d'action pour l'égalité des sexes, la convention d'Aarhus dans chaque contexte national, avec une sensibilisation des parties prenantes concernées. En outre, les délégations de l'UE devraient mener des consultations régulières pour atteindre un large éventail d'acteurs de la société civile issus de la base, des groupes de jeunes et des réseaux régionaux, y compris ceux qui ont des liens avec les défenseurs de la justice climatique dès le début du processus de programmation. Les consultations devraient comprendre des orientations et des informations claires et être transparentes sur les attentes et les résultats; des informations régulières sur les opportunités et le processus devraient être fournies, en s'appuyant sur le processus du site de suivi de la programmation conjointe.

— Majalat project

Other comments formulated alternative ideas:

Making the UfM Energy Cooperation Platform really effective is also a priority.

— Italian respondent

Invest in formal and non-formal education that builds the knowledge and skill base for the energy transition.

— Committee for International Voluntary Service

Promote EU best practice examples via exchange and education programmes.

— German respondent

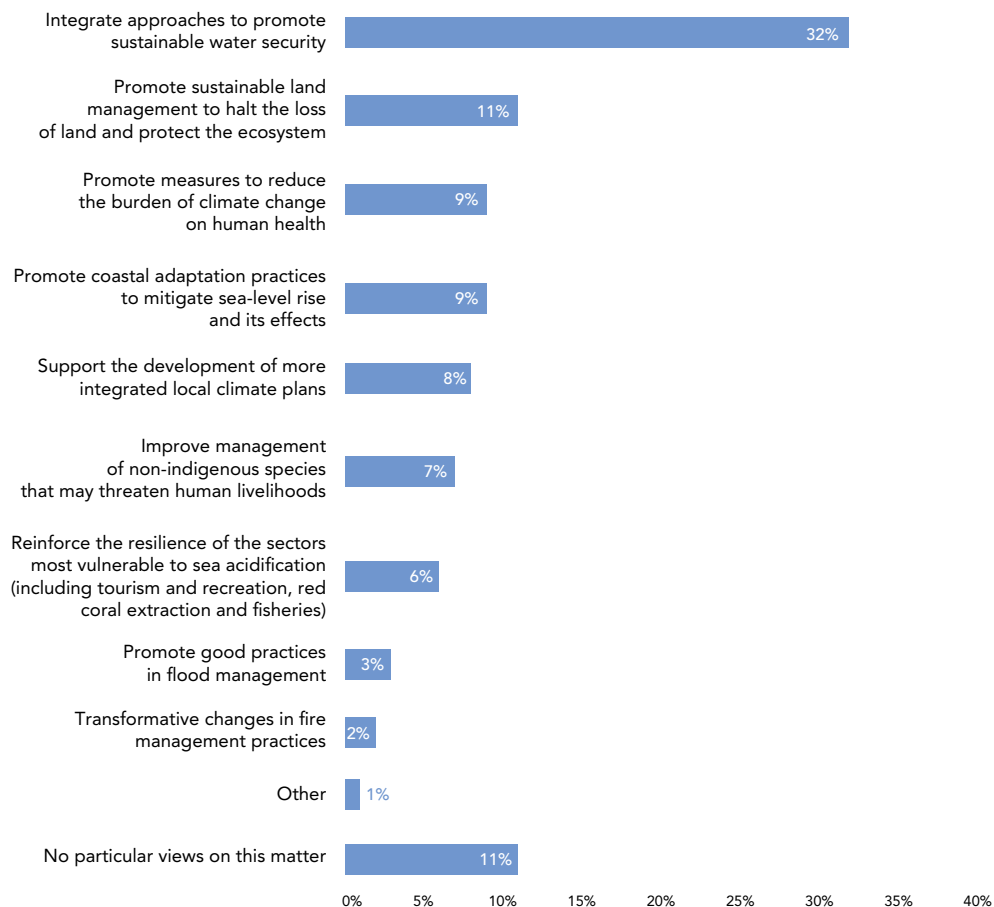
## Addressing Climate and Environmental Change in the Mediterranean

**Question 19** turned to the measures to be adopted to address climate and environmental change in the Mediterranean region. Respondents were invited to choose and rank their three top priorities out of nine potential actions to target the issue.<sup>1</sup> It is worth noting that a significant majority selected water security as their top priority, while the other eight options were chosen by a much lower number of participants. Specifically, 32% of respondents identified the need to integrate approaches to promote sustainable water security as their first preference, while 11% chose the promotion of sustainable land management to halt the loss of land and protect ecosystem as their top priority. All the other options were selected by less than 10% of the participants (see graph 35).

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1. MedECC 2020 Summary for Policymakers. In: Climate and Environmental Change in the Mediterranean Basin – Current Situation and Risks for the Future. First Mediterranean Assessment Report [Cramer W., Guiot J., Marini K (eds.)] Union for the Mediterranean, Plan Bleu, UNEP/MAP, Marseille, France, 34 pp., in press

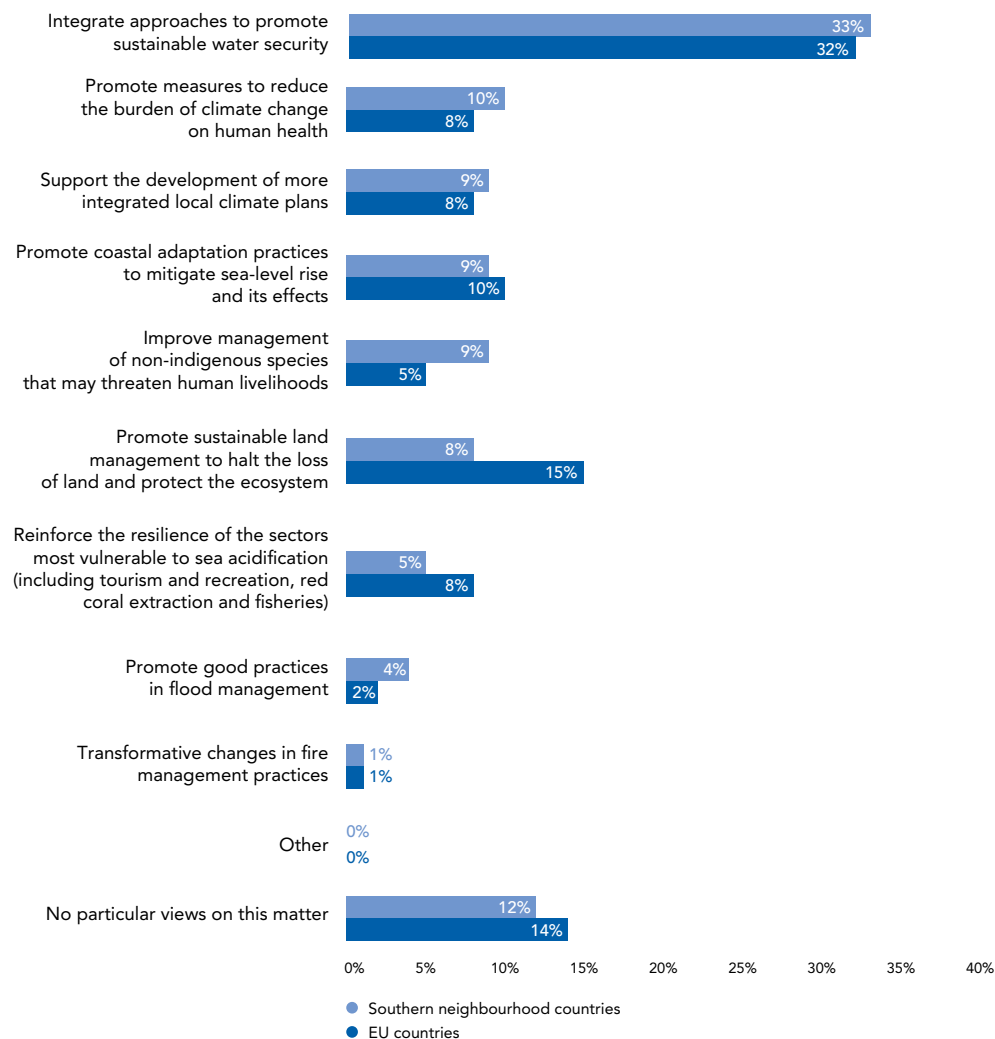
**Graph 35: Q.19 Priority measures to face climate and environmental change in the Mediterranean (Ranked as first option)**



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

While more than 30% participants from both EU and southern neighbourhood countries chose the need to integrate approaches to promote sustainable water security as their first preference, EU respondents were more inclined than southern neighbourhood participants to consider the promotion of sustainable land management to halt the loss of land and protect the ecosystem as their second priority (15% and 8%, respectively) (see graph 36).

**Graph 36: Q.19 Priority measures to face climate and environmental change in the Mediterranean (Ranked as first option)**



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

In the following comments, respondents elaborated on their answers on how to address climate change in the region:

La gestion de l'eau est un paramètre inéluctable des stratégies d'adaptation au changement climatique. De fait, la question de l'eau revêt une importance critique dans le contexte sud-méditerranéen et africain, dont les pays sont menacés par le stress hydrique à l'horizon 2040. Il en découle l'impératif de mettre en place une agenda et des plans climatiques locaux intégrés, construits selon une approche Nexus et permettant une coordination poussée entre les politiques sectorielles et les stratégies locales et nationales dédiées à la question. Du fait de son expérience en la matière, le soutien de l'Union européenne pourrait s'avérer crucial pour les pays de son voisinage sud pour l'élaboration et l'harmonisation de tels plans.

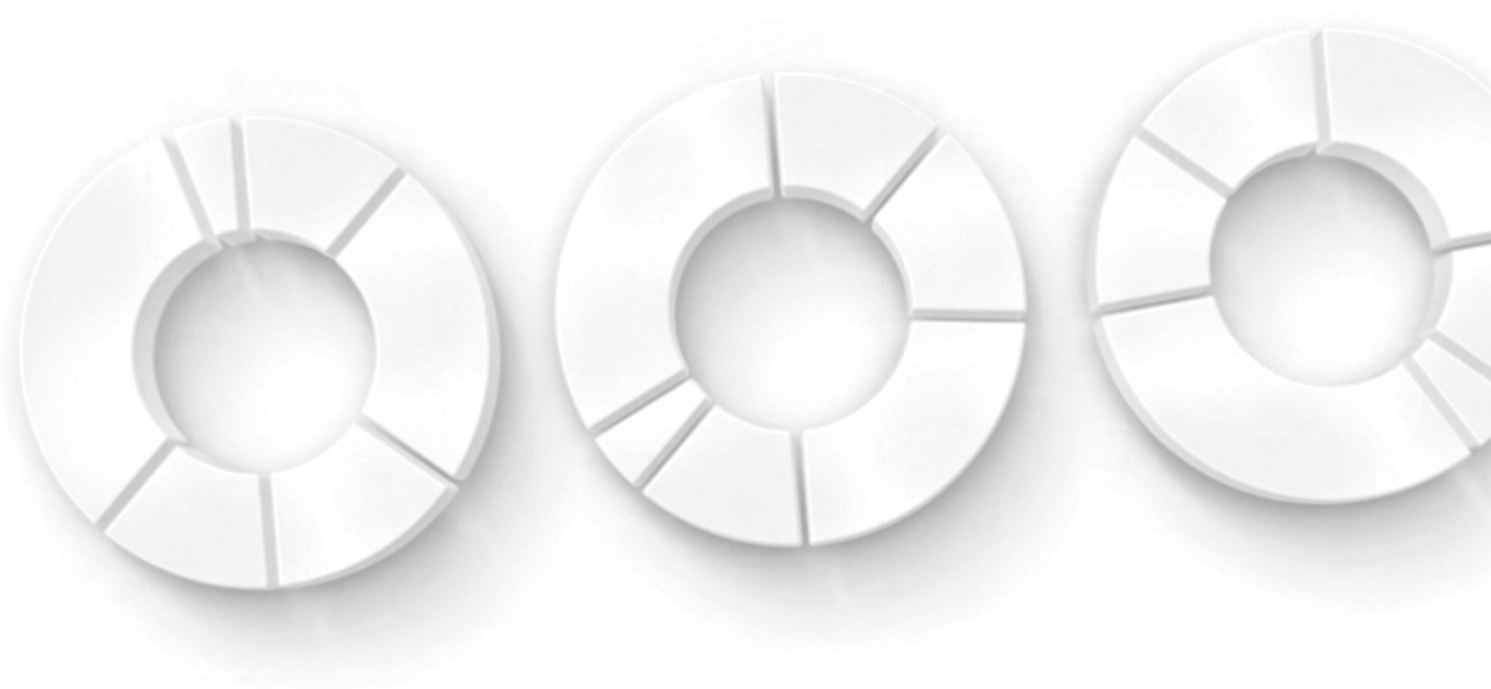
— Institut Royal des Études Stratégiques (IRES)

A massive review of the situation within each country is needed. What competences are available in each country and which competences are needed but are missing? Supranational/regional plans need to be put in place to face these issues concertedly with an active participation of civil society.

— Egyptian respondent

All the points listed have their importance on the environment and the impact of climate change. The southern region, within the framework of the international events, promotes its engagement in MEDCOP and the recommendations resulting from the dialogues of the Mediterranean of the future. The issue of plastic waste, which mobilised project stakeholders and policy-makers, is also of a great interest.

— Région Provence-Alpes-Côte d'Azur



# Peace and Security Cooperation

The last block of the EuroMeSCo Euromed Survey provides insights into how respondents assess the cooperation between the EU and its counterparts in the southern neighbourhood in preventing and countering violent extremism, and into maritime security and counter-terrorism in the Sahel.

It also aims to define the different actions that the EU could take to contribute more effectively to solving conflicts in the region, as well as to boosting its response to emerging cybersecurity and violent extremism threats exacerbated by the Covid-19 pandemic, in cooperation with its southern partners.

## Main findings:

- There is a strong consensus around the assertion that efforts by EU member states to unify their positions and speak with one voice is the most appropriate means to contribute more effectively to solving conflicts in the region.
- In general, opinions on issues related to peace and security cooperation by southern neighbourhood respondents are less critical than EU respondents. For instance, the cooperation between the EU and its counterparts in the southern neighbourhood in preventing and countering violent extremism since the 2015 ENP Review was only perceived as positive by southern neighbourhood respondents.
- Similarly, when asked to assess the maritime cooperation in the Mediterranean between the EU and its southern partners, southern neighbourhood respondents showed more tendency to have a positive view of it compared to EU respondents. The latter exhibited a certain level of scepticism about this cooperation, with a significant proportion of EU respondents assessing it as bad or very bad.

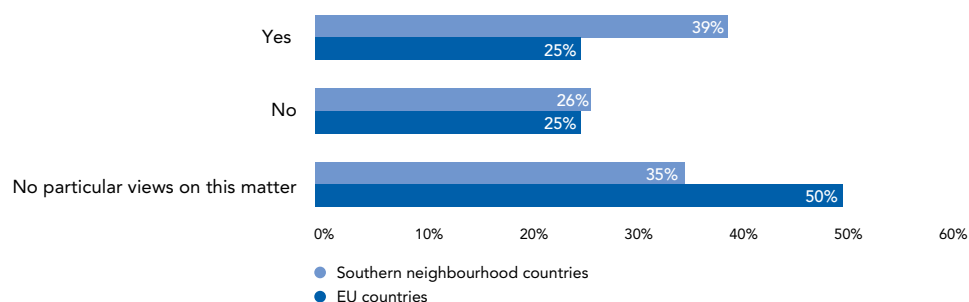
- As far as the cooperation between the EU and its southern partners to counter terrorism in the Sahel is concerned, again, EU respondents were slightly more inclined to have a negative view of this cooperation than southern neighbourhood respondents.
- When it comes to identifying possible actions that the EU could take, in cooperation with its southern partners, to bolster its responses to emerging cybersecurity and violent extremism threats, respondents think the EU's provision of education, promotion of physical and cultural activities, and improvement of employment opportunities for youth in the southern neighbourhood should be the main priority.

## The EU's Engagement with its Southern Mediterranean Neighbours in Preventing and Combating Violent Extremism (P/CVE)

**Question 20** was designed to capture the opinion of respondents on whether the cooperation between the EU and its counterparts in the southern neighbourhood in preventing and countering violent extremism since the 2015 ENP Review is working.

Exactly half of the respondents from EU countries expressed “no particular views on this matter” and fewer respondents from the southern neighbourhood countries (35%) answered that way. For the rest, respondents from southern neighbourhood countries were less critical of the cooperation with 39% believing it to be working compared to 25% of EU respondents (see graph 37).

**Graph 37:** Q.20 Is it working the cooperation between the European Union and its counterparts in the southern neighbourhood in PVE and CVE since the review of the European Neighbourhood Policy in 2015?



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

As a follow-up to this question, many of those who do not think that cooperation is working, formulated recommendations by particularly insisting on the importance of addressing the root causes of terrorism and violent extremism, as well as elaborating on the nexus between the fight against violent extremism and the promotion of education, on the one hand, and the fight against violent extremism and good governance, on the other:

The current cooperation between the European Union and the SMCs is based on confronting terrorism without addressing the root causes of terrorism and extremism, which are often weak educational infrastructure, lack of job opportunities, widespread ignorance, government corruption and poverty, and political instability in the region.

— Palestinian respondent

Much more should be done to tackle the root causes of violence and terrorism in the region – in terms of good governance, economic growth and human rights.

— Israeli respondent

Conflict, terrorism, corruption and human rights abuses are complex problems that cannot be treated in isolation.

— British respondent

Violent extremist groups must be confronted with more efforts in support of civic education based on the promotion of democratic values and human rights principles in educational curricula.

— The Egyptian Association for the Advancement of Community Participation in Fayoum

## How to Bolster Resilience Against Cyber Threats and Violent Extremism?

**Question 21** was open-ended and designed to focus on the impact of the Covid-19 pandemic on global security, including on cybercrime and violent extremism, and especially on young people spending more time online at home, thus becoming more vulnerable to online recruitment and radicalisation.

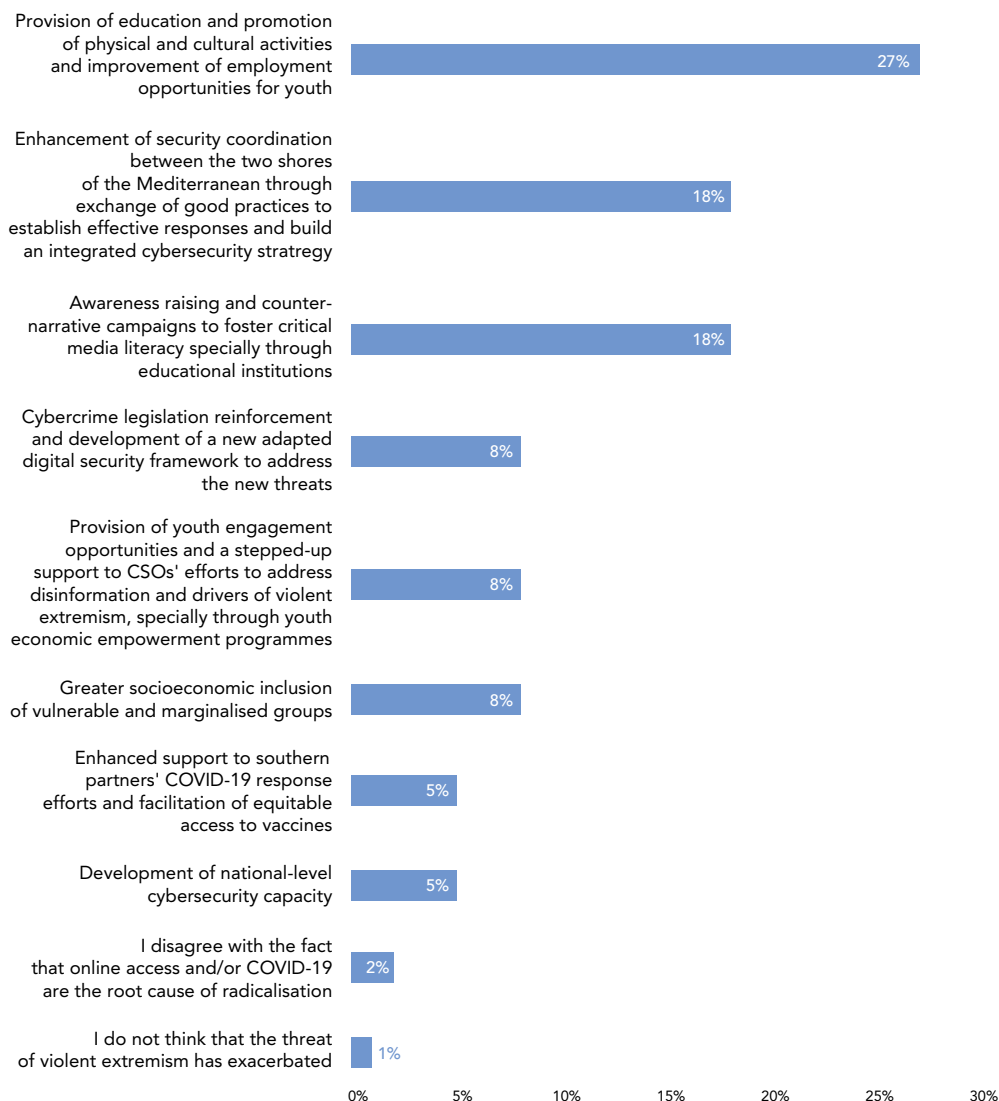
This question aimed to sound out respondents on possible actions that the EU could take, in cooperation with its southern partners, to step up its responses to these emerging security threats.

The ad hoc categories shown (see graph 38) were developed based on the results obtained. The most frequently chosen answer recognises the importance of addressing some of the main drivers considered to be conducive to violent extremism and radicalisation: lack of educational or employment opportunities. Thus, the most recurrent answer is the EU's provision of education, promotion of physical and cultural activities, and improvement of employment opportunities for youths in the southern neighbourhood (27% of all responses).

Security coordination and awareness-raising were the other categories that obtained a significant number of answers (18% each) (see graph 38).

Additionally, a notable aspect of the breakdown of answers is that Maghreb respondents prioritise the enhancement of security coordination between the two shores of the Mediterranean (25%) over the EU's provision of education, promotion of physical and cultural activities, and improvement of employment opportunities for youths in the southern neighbourhood (23%), as well as over awareness-raising campaigns (18%).

**Graph 38: Q.21** How should the European Union step up its response to new security threats, in cooperation with its southern partners? (Categories developed from the open-ended answers)



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

Here is a sample of comments formulated by respondents who stressed the importance of education and employment of youths in the southern neighbourhood:

Améliorer le niveau de scolarisation et de l'enseignement en intégrant des activités parascolaires utiles surtout sportives et culturelles.

— Moroccan respondent

Invest in global citizenship education, education for health and well-being, education and gender equality, skills for work and life (TVET), teachers, textbook development, right to education, among others.

— Respondent from UNESCO

Sharpen the focus on youth employment and education, so their feelings of despair and injustice can be addressed. Otherwise, extremist groups could take advantage of their vulnerabilities.

— Spanish respondent

Those are chronic problems that are repeatedly aggravated by wider developments. A lot can be done to minimise these threats (like developing more sophisticated and coordinated legislations), but what can really make a difference is creating alternatives that make crime and extremism less rewarding.

— Daraj (independent digital media platform), Lebanon

Open-ended answers referring to security coordination and awareness-raising mentioned the role of media literacy education and technological convergence:

A common strategy to fight organised crime and violent extremism in the digital sphere, in addition to creating a “regional digital centre” to coordinate actions, exchange good practices and foster dialogue.

— Algerian respondent

Perhaps the most important thing that the Covid-19 crisis has taught us is the fact that we are thoroughly interconnected beyond borders and indeed “sitting in the same boat” where such challenges can only be met if we act together. Only a higher degree of cooperation and concerted efforts can help us all survive these challenges. The EU has the prerequisites and basic capabilities to meet such challenges through wider cooperation, including legal and technological convergence.

— Swedish respondent

Media literacy and dialogue programmes are needed in specialised TV channels that are capable of adequately addressing the situation and have the capacity to reach the vulnerable groups.

— Croatian respondent

Resilience to online recruitment and radicalisation involve education and increased awareness. Hence, school curricula should be amended with courses on how to navigate in an increasingly hostile online environment and how to detect and denounce the recruitment attempts.

— Polish respondent

## The EU and Conflict Resolution in the Southern Neighbourhood

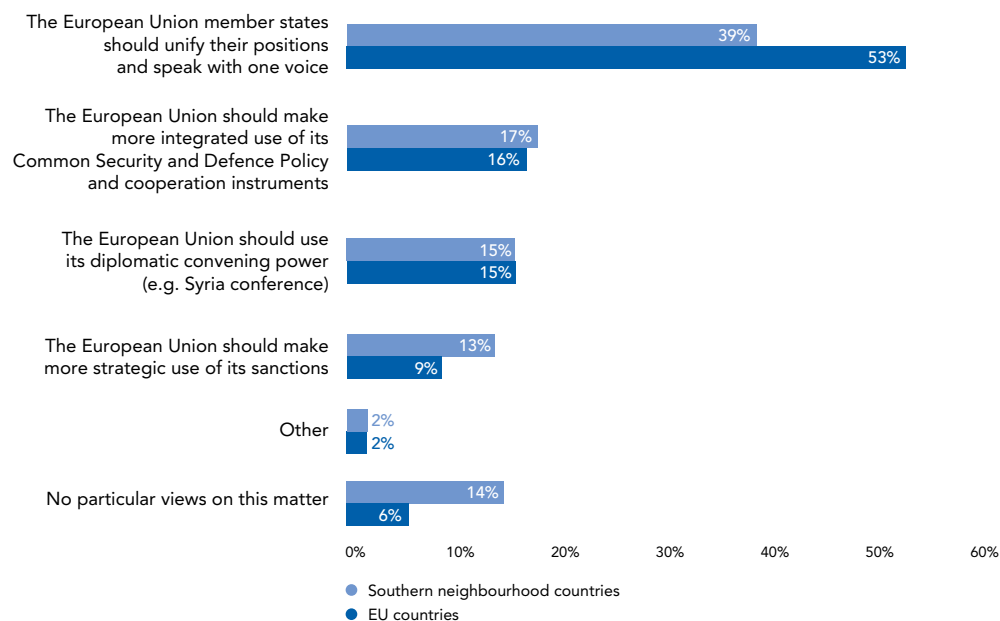
**Question 22** invited participants to identify the main options the EU should consider to contribute more effectively to solving conflicts in the region.

Nearly half of respondents (46%) chose the EU member states' efforts to unify their positions and speak with one voice as their most preferred option.

The second most preferred conflict resolution strategy (16%) is for the EU to make more integrated use of its Common Security and Defence Policy (CSDP) and co-operation instruments, followed (15%) by the EU's use of its diplomatic convening power (e.g. Syria conference). Only 11% of respondents identified the fourth and last option as their top priority, which called for the EU's more strategic use of its sanctions.

There were no significant differences in patterns between answers from southern Mediterranean and EU countries, although a higher proportion of respondents from the latter said that their top priority is for EU member states to speak with one voice, as shown in graph 39.

**Graph 39: Q.22. Options for the European Union to contribute more effectively to solving conflicts in the region (Ranked as first option)**



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

In their comments, some participants elaborated on their answers, while others formulated alternative ideas:

The EU should step up its multilateral cooperation with the League of Arab States and the African Union.

— Spanish respondent

The EU should take a stronger stand on human rights violations in the region without excluding any country.

— Jordanian respondent

The EU should not only adopt a coherent strategy and put aside single member's interests, but it should also invest in the development of hard power policies in order to make its voice really heard.

— Czech respondent

Long-term solutions for achieving peace and stability initially require the EU to contribute to a paradigm shift from a state security approach to a focus on human security. Peace-building initiatives should also ensure national ownership, enhanced inclusivity and should be designed and implemented based on the specific needs of the country.

— Lebanese respondent

The real problem lies within the EU: member states often have diverging strategic interests in the region. In this regard the self-proclaimed EU Foreign Policy is pure fiction.

— Italian respondent

La coopération sécuritaire devrait être multidimensionnelle et intensifiée. Pour cela, il faudrait renforcer les capacités des pays vulnérables en matière de prévention et de lutte contre les activités terroristes et assurer un transfert des compétences; adopter une approche socio-économique pour apporter des réponses de fond aux facteurs générateurs de l'insécurité.

— Institut Royal des Études Stratégiques (IRES)

## Maritime Security in the Mediterranean and Counter-Terrorism in the Sahel

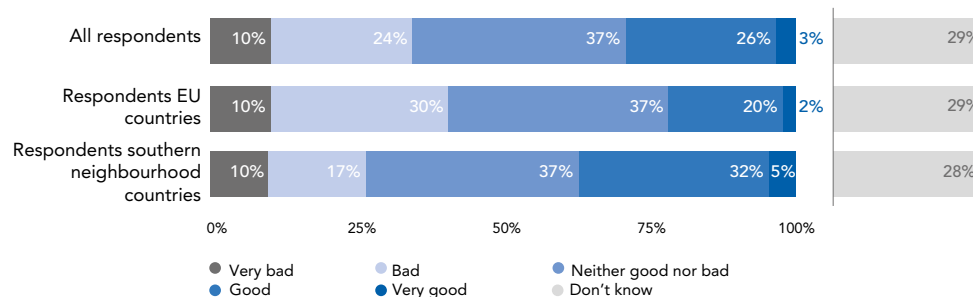
**Question 23** focused specifically on key CSDP actions of the EU in the region, namely maritime security in the Mediterranean (EUNAVFOR MED IRINI) and counter-terrorism in the Sahel (EUTM Mali, EUCAP Sahel Mali, EUCAP Sahel Niger).

Respondents were asked to assess the cooperation of the EU with its southern partners in both cases. Reflecting the rather technical nature of these questions, a higher proportion of respondents than in other questions of the Survey chose the “don’t know” answer.

Overall, respondents were rather sceptical, with 34% believing the maritime security cooperation in the Mediterranean to be “bad” or “very bad” in comparison with 29% of respondents deeming it “good” or “very good” (see graph 40). Likewise, 36% of respondents considered the cooperation of the EU with its southern partners on counter-terrorism in the Sahel to be “bad” or “very bad”, while 25% believed it to be “good” or “very good” (see graph 42).

However, there was a greater tendency for southern neighbourhood respondents to have a positive view of the maritime security cooperation (32%) compared to EU respondents (20%). The latter exhibited a certain level of scepticism about it, with 40% believing it to be “bad” or “very” bad (see graph 40).

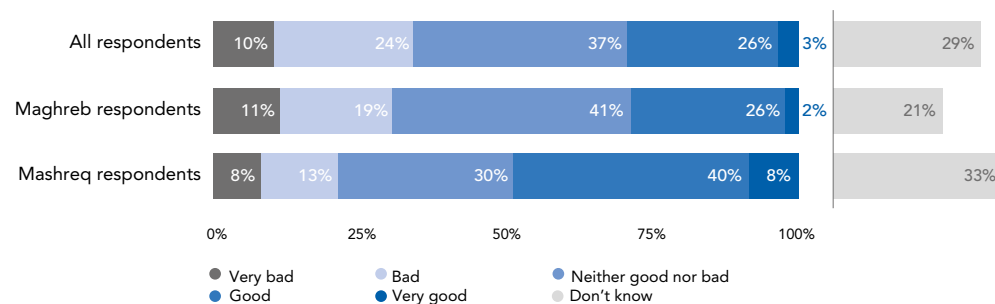
**Graph 40: Q.23** How do you assess the cooperation between the European Union with its southern partners on maritime security?



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

There are significant differences between the patterns of answers from Maghreb and Mashreq participants: 48% of Mashreq respondents considered this cooperation to be “good” or “very good” compared to only 28% of Maghreb respondents.

**Graph 41: Q.23** How do you assess the cooperation between the European Union with its southern partners on maritime security?



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

In their open comments as a follow-up to the question, some respondents pointed out the importance of prioritising humanitarian or mobility aspects rather than border control:

The priority should be search and rescue (SAR) operations and not border control, especially considering the hosting conditions of migrants in Libya.

— French respondent

Maritime missions should be intended for rescue, and cooperation with riparian states should be designed to govern an orderly migration and not to counter it.

— Un Ponte Per / Medlink

Comments also called on the EU to review its policies of cooperation with Libya on border control:

Il faut encourager les États membres à dépénaliser la solidarité avec les migrants et leur sauvetage, mettre en place un mécanisme de sauvetage européen des migrants en mer Méditerranée. Enfin, des sanctions envers les pays de départs comme la Libye, dont les gardes côtes ne respectent en aucun cas les droits humains, devraient être établies.

— REF - Réseau Euromed France

The EU should first support the most vulnerable, among them the migrants and refugees who are facing inhumane and degrading treatment in Libya.

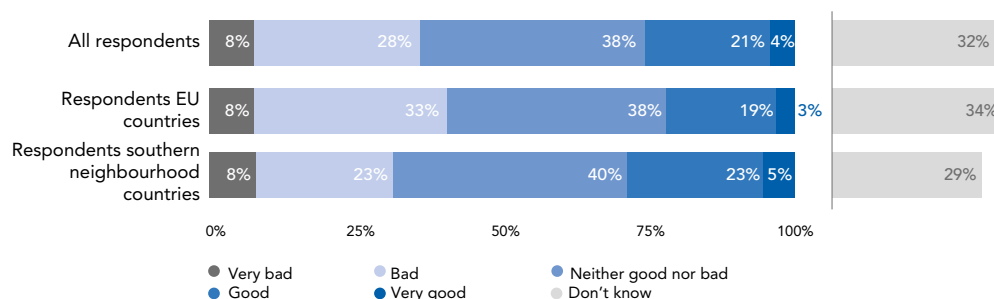
— EuroMed Rights

The EU must stick to its values; stop pushing migrant boats back into the sea, or cooperating with the Libyan Coast Guard, which is involved in grave human rights violations.

— Polish respondent

As for the cooperation between the EU and its southern partners to counter terrorism in the Sahel, again, respondents are more negative than positive about it overall. However, it is worth observing that there are significant variations between EU and southern neighbourhood respondents. The former were more inclined to have a negative view of this cooperation (41% considered it “bad” or “very bad”) than southern neighbourhood respondents (31%), as shown in graph 42.

**Graph 42:** Q.23 How do you assess the cooperation between the European Union with its southern partners on counter-terrorism in the Sahel?



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

Question 23.4 was a follow-up question as it invited respondents to elaborate on their answer and identify areas for improvement.

Avoir une meilleure connaissance des cultures des nations concernées, développer une approche plus respectueuse des sociétés, soutenir plus résolument le développement socio-économique des populations.

— CERMAC (Centre d'Études et Recherches sur le Monde Arabe Contemporain) UC Louvain

Face à des problèmes régionaux, l'UE oppose des mécanismes nationaux comme EUCAP Niger et EUTM Mali. Il faut penser à la régionalisation de la réponse en régionalisant les missions EUCAP, et en assurant la coordination entre ces missions et d'autres initiatives UE dans la région comme CIVIPOL.

— Moroccan respondent

Adopt a comprehensive approach that takes into account the achievement of sustainable development in these African countries, especially in the poorest areas which represent a fertile environment for recruitment and shelter of terrorist groups.

— Egyptian respondent

Expand the political dimension of the missions in the Sahel. What we see are not pure violent insurgencies but classic cases of weak central governance that fail to address the grievances of the peripheries.

— German respondent

Une meilleure coordination entre l'Union européenne, les forces locales de sécurité et l'Union africaine permettrait d'optimiser les résultats des actions menées au Sahel tout en assurant plus grande visibilité aux partenaires africains, garantissant, de ce fait, une appropriation locale de la gestion des conflits.

— Institut Royal des Études Stratégiques (IRES)

Northern countries must be aware that their progress, stability, and security are directly related to the progress, stability and security of their southern neighbours. Greater communication is needed in everything that is being done and what is intended to be done.

— Atalayar (online news magazine) Spain

Réduire la présence militaire de certains pays européens clés, et cela passe par le renforcement qualitatif des moyens de défense des pays du Sahel.

— Algerian respondent



# QUALITATIVE ANALYSIS



# Can the EU Share Values with its Partners in the Southern Neighbourhood?

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The decade since the Arab uprisings has been a difficult one for the European Union (EU) in its dealings with its southern neighbourhood, and it has struggled to strike a balance between its commitment to democracy and the protection of human rights, on the one hand, and its homeland security interests, on the other.

Back in the heady days of 2011, it was hoped that the uprisings in the southern neighbourhood would result in a new dispensation that would result in a happy marriage of the two, insofar as new democratic governments would take root and understand that stability and security on both sides of the Mediterranean would best be served by opening up their societies.

Consequently, the EU and its member states gave strong political, moral and financial support to the uprisings and invested considerable political capital in them. To take one example, Catherine Ashton, the EU High Representative at the time, made no less than 15 visits to Egypt between 2011 and 2013, as she strived, with the full support of member states, to facilitate an inclusive democratic transition.

But with the important exception of Tunisia, those transitions never happened, and as internal conflicts broke out in Libya, Syria and elsewhere, governments in the region reverted to the old social contract predicated on them providing order and stability to their citizenry in return for the latter's acceptance of illiberal or authoritarian governance.

Aggravated by conflicts, the twin dangers posed by extremism and illegal migration grew apace after 2013, the EU was forced to retreat back into its pre-2011 shell, and, while efforts to support rights and civil society continued, they took second place as the EU adopted an essentially defensive stance in its relations with the region, as reflected in the revised European Neighbourhood Policy (ENP)

Since the Arab uprisings the EU has struggled to strike a balance between its commitment to democracy and the protection of human rights and its homeland security interests.

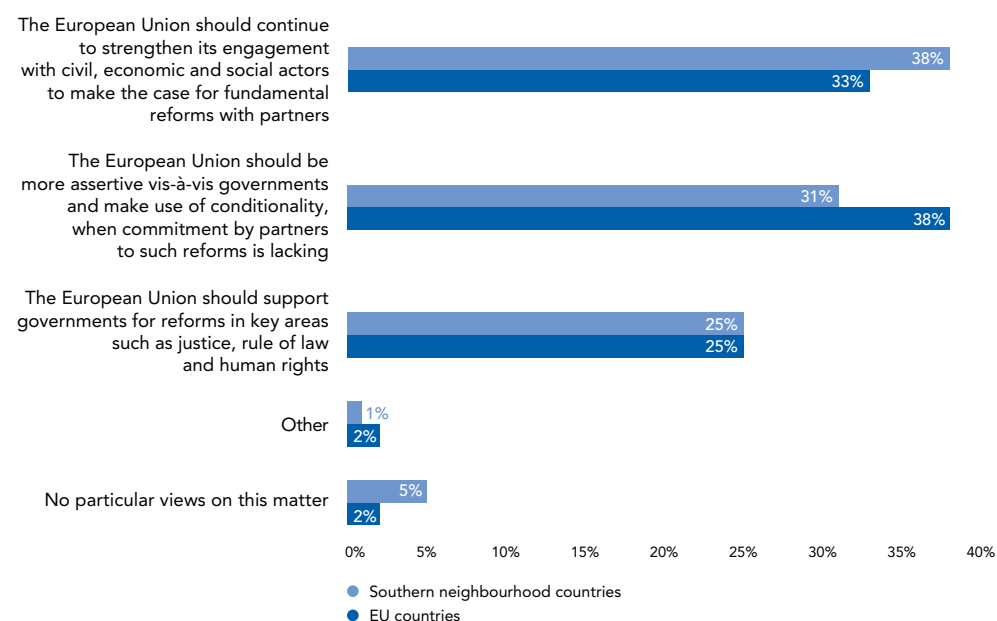
After 2013, dangers posed by extremism and illegal migration grew quickly. While EU efforts to support rights and civil society continued, they took second place as the EU adopted an essentially defensive stance.

introduced in 2015, where stability and security were the main aims to be pursued with its southern partners.

That said, democratic values, rights and freedoms continue to attract a good deal of support in southern neighbourhood countries, especially among an increasingly educated youthful population – it should always be recalled that the average age in southern neighbourhood countries is in the mid-twenties – and these factors, together with economic deprivation, were at the root of the new wave of protests that began in 2019.

Apropos, the EuroMesCo Euromed Survey brought out the continuing importance of values in the EU-southern neighbourhood relationship, with over a third of respondents calling for a more assertive engagement by the EU in making the case for human rights, though there were differences between the North and South on how best to do this. Many in the southern neighbourhood stressed that political reforms should be driven from within their societies, while a number of EU respondents felt that they needed to be imposed from the outside, with EU financial support given on conditional terms.

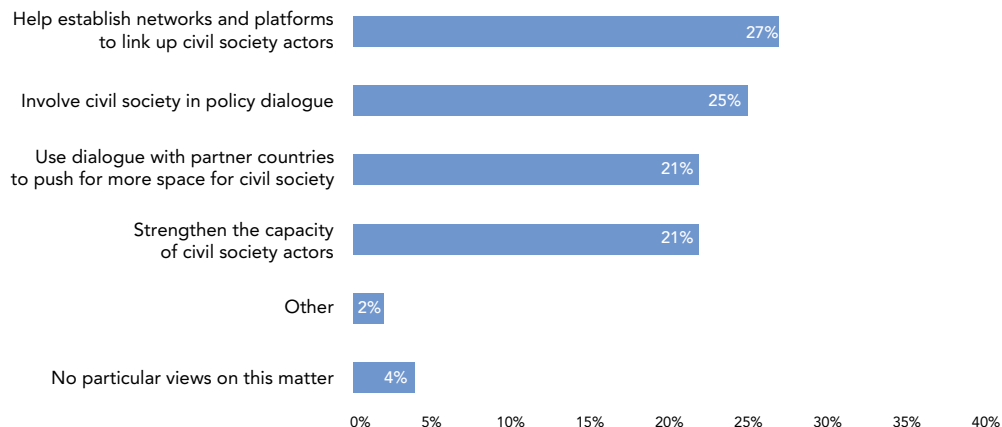
**Graph 1: Q.10** When it comes to supporting reforms in the fields of good governance, democracy, the rule of law and human rights (Ranked as first option)



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

The Survey respondents also thought that the EU needed to intensify its interaction with southern neighbourhood civil society, with a quarter of them feeling that the best way to achieve this would be for the EU to involve it in policy dialogue.

**Graph 2: Q.9 What could the European Union do to further support civil society in Southern Mediterranean Countries in fully playing its role? (Ranked as first option)**



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

These views are to an extent reflected in the EU's "new agenda for the Mediterranean" which states that promotion of respect for human rights, rule of law and democratic values, is to be stepped up alongside policy dialogue with all relevant stakeholders. Among others, this includes commitments to support legislative, judicial and institutional reform, the empowerment of women and youth, labour standards, capacity-building for civil society and data protection frameworks.

On conditionality, the new agenda makes the link between the level of EU support and the degree of partners' real commitment to economic and governance reforms, stating that this "policy first" quid pro quo should be formalised upfront in the priorities to be jointly agreed with all partners.

This will be a tough nut to crack. Agreeing policy priorities in the field of rights and civil society under the existing ENP proved to be extremely difficult in some cases, and the compromises reached resulted in rather weak commitments.

The EU does retain leverage to spur reform but it is limited, and if it is to succeed it will need a high degree of solidarity with member states, something which may prove challenging given the different bilateral foreign policy priorities.

For example, Greece, Cyprus and some eastern EU members are unlikely to support a push for reform in Egypt if this creates tension, as it almost certainly will, with the government in Cairo, who they see as a key ally in the maritime disputes in the Eastern Mediterranean, or as a bulwark in cooperation against illegal migration. Some others who may be supportive in principle will also have commercial interests in mind, such as arms exports, which they will be reluctant to put at risk.

The new agenda makes the link between the level of EU support and the degree of partners' real commitment to economic and governance reforms. A difficult point as the existing ENP proved to be extremely difficult to develop in some cases.

As for other likeminded partners. The new US administration might be prepared to make some common cause, but it is yet to be seen whether it has the bandwidth – and interest – to follow through on President Biden’s pronouncements about putting values at the heart of US foreign policy in the region.

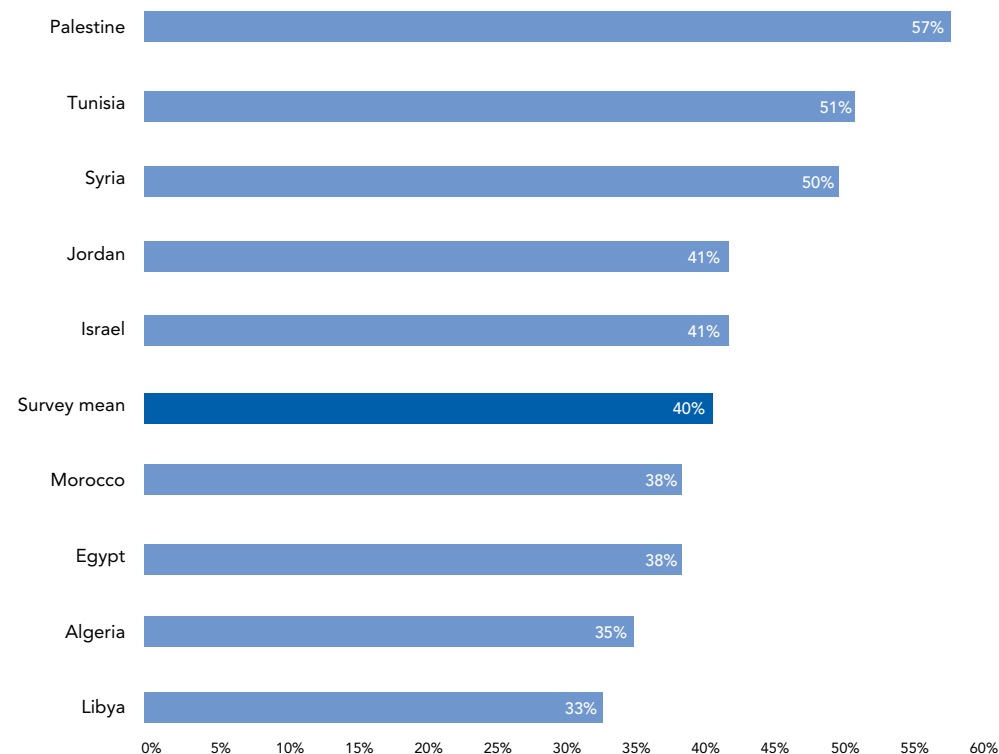
There is a widespread concern of southern neighbourhood citizens about growing corruption, insufficient governance and institutional capacity as the main factor.

One values-related issue deserves special attention: a major driver of unrest, both in 2011 and in the more recent protests in Algeria, Lebanon and elsewhere has been the widespread concern of southern neighbourhood citizens about growing corruption, and this was brought out in the EuroMesCo Euromed Survey, with no less than 40% of all respondents spotlighting “corruption, insufficient governance and institutional capacity” as the main factor limiting progress in EU cooperation.

There was also a clear overall consensus on this between EU and southern neighbourhood participants, though with some marked differences within the southern neighbourhood, ranging from 57% among Palestinian respondents to 33% in Libya.

**Graph 3: Q.6 What are the major constraints limiting the success of the cooperation between the European Union and its southern neighbours?**

(First top option: Corruption, insufficient governance and institutional capacity)



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

An EU comment was salutary: “Corruption at all levels has eroded public trust and created a climate of discontent and disarray.” That said, it is important to add that the Survey category included three elements, albeit interrelated, and one should not rush to the judgement that corruption per se was the prime concern in every case. Nonetheless, the results indicate that it is an area where the EU would do well to ramp up its efforts to control it.

Transparency International (TI)’s latest (2020) Corruption Perceptions index, probably the best international metric available, gives some independent perspective on this. Other than Israel, southern neighbourhood countries are not doing well. To quote TI on the region’s overall performance (this includes Gulf countries):

*“For the third consecutive year, the Middle East and North Africa region is still perceived as highly corrupt, with little progress made towards controlling corruption.”*

In fact, many southern neighbourhood states languish deep in the bottom half of the 180 countries listed, with some, notably Lebanon and Egypt, trending markedly downwards in recent years. The emergency measures brought in to fight the pandemic made things worse last year, with already weak accountability mechanisms often suspended in the name of exigency. The two exceptions are Jordan and Tunisia.

Tunisia is one of the few southern neighbourhood countries that can point to an improved performance on corruption since 2011, even managing to move up the TI ranking last year. The reasons for this are complex but many analysts and donors give credit for this to Tunisia’s fledgling democracy and especially its highly active civil society.

Turning to the EU’s New Agenda, there is a focus on supporting the independence of the judiciary and the importance of that for fighting corruption, as well as human rights violations and organised crime. Moreover, it calls on southern partners to ensure that fraud, corruption, money laundering and misappropriation are addressed through effective sanctions as well as through cooperation with the European Anti-Fraud Office, and that in cases where they are parties to international agreements on legal assistance, partners should accept the European Prosecutor’s Office as a competent authority for the enforcement of those accords.

In addressing the issue, the EU may want to weigh the experience on fighting corruption in the Western Balkans, where there have been some successes through funding for strengthened institutions, capacity-building and training, systems and tools (public procurement databases, codes of conduct), and awareness-raising.

Given that the degree of cooperation and EU leverage there is rather different from that in the southern neighbourhood, driven as they are by the aspirations of Western Balkan nations to join the EU, one would not expect the same results, but there could be useful lessons to learn.

As for the case of Tunisia, there could be some best practice to call on when dealing with the problem in the wider region. But with its somewhat unique system of governance, it is questionable whether Tunisia can serve as a credible model elsewhere.

The EU’s New Agenda also focuses on fighting corruption. The EU may want to weigh the experience on fighting corruption in the Western Balkans, where there have been some successes.

The likelihood of greater misuse of donor funds in the post-pandemic environment is high, and robust engagement with the authorities will be needed to protect the interests of the EU and programme beneficiaries.

Overall, the Survey has underlined the importance for the EU and other international partners of stepping up efforts to stem corruption, which will almost certainly be aggravated by the new pandemic-related emergency measures. Rolling these back will not be easy, especially in more authoritarian states where institutional and judicial checks and balances are fragile and civil society is suppressed.

Among other things, the likelihood of greater misuse of donor funds in the post-pandemic environment is high, and robust engagement with the authorities will be needed if the EU's interests, and indeed those of the beneficiaries of its assistance programmes, are to be properly protected.

In all, there is reason to believe that the old social contract in the southern neighbourhood, if not yet broken, is under immense strain, and the constituency for change is young and growing. At the same time, the economic and social disruption caused by the fallout from the pandemic and the emerging global transition away from oil may well accelerate its progress in the years to come and lead to further unrest. Sustainable security and stability is thus likely to prove elusive.

Against this background, finding ways and means of supporting positive change will pose a serious challenge for the EU. Its New Agenda points a way ahead, but it will require a degree of EU unity and solidarity that has been somewhat lacking up to now, and a new political impulse will be needed if it is to succeed in its aims.

# From Hot Seat to Powerhouse: Managing Climate Change in the Southern Neighbourhood

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When it comes to climate change, we have a host of paradoxes in the southern neighbourhood: on the one hand, it is by now common knowledge that the region will be the hardest hit in the world, but it is, at the same time, one of the least prepared to face this, and its publics do not perceive the problem as such. These points, taken together, are one of the reasons why the topic appeared prominently not just in the Survey but also in the Joint Communication released in February 2021.<sup>1</sup> To make matters more puzzling, the region receives a daily abundance of sunshine but generates only 0.4% of its energy mix from solar power.<sup>2</sup> This means two things: on the one hand, there is considerable work to do to “future-proof” the region for what will come its way but, on the other, the untapped potential to do so is equally considerable. If leveraged well, climate change – or rather, measures to avoid it – could therefore become a crucial driver for modernisation in the region.

Three areas can be identified in this order of priority: firstly, publics in the southern neighbourhood need to be urgently made aware of the problem that they are facing, while states in the region need to prepare for those effects of climate change that can no longer be avoided; secondly, it will have to prepare for the coming energy transition in order to benefit from it; and, thirdly, it will have to decrease CO<sub>2</sub> emissions in order to avoid even worse consequences.

Climate change in the southern neighbourhood will have the hardest hit in the world, but it is, at the same time, one of the least prepared to face this.

If leveraged well, climate change – or rather, measures to avoid it – could therefore become a crucial driver for modernisation in the region.

1. European Commission, “Southern Neighbourhood: EU proposes new Agenda for the Mediterranean”, 9 February 2021, [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_21\\_426](https://ec.europa.eu/commission/presscorner/detail/en/ip_21_426)

2. Aditi Banerjee et al., “Natural Disasters in the Middle East and North Africa: A Regional Overview”, World Bank Working Paper, 2014, <http://documents.worldbank.org/curated/en/211811468106752534/Natural-disasters-in-the-Middle-East-and-NorthAfrica-a-regional-overview>, p. 14. IRENA, “Pan-Arab RenewableEnergyStrategy 2030: Roadmap of Actions for Implementation,” June 2014, <https://www.irena.org/publications/2014/Jun/Pan-ArabRenewable-Energy-Strategy-2030-Roadmap-of-Actions-for-Implementation>

## Facing the unavoidable

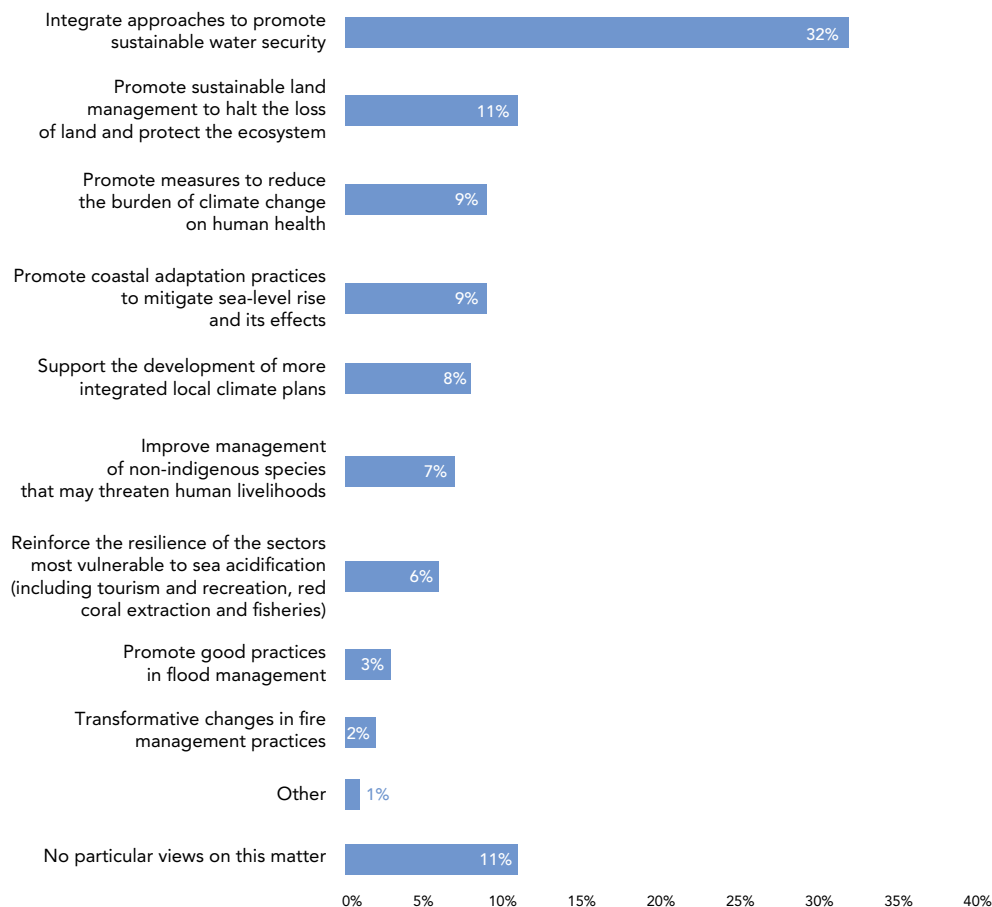
The increase in temperatures will affect water resources and almost all countries in the region will be at water crisis risk.

No matter what actions are taken between now and 2030, there are certain effects the southern neighbourhood will no longer be able to avoid. This is because measures against CO<sub>2</sub> emissions take several years to take effect as it takes a long time for the gas to be dissolved in the atmosphere. Even if all CO<sub>2</sub> emissions ceased today, we will therefore see effects in the near future. For the southern neighbourhood, this means that by 2030, the region will be 1-1.5°C degrees hotter – on average but with significant differences at the national or local level. In Lebanon, temperatures will rise by 1 degree on the coast but by 2 degrees inland.<sup>3</sup> Matters are even worse in Tunisia, where temperatures are expected to rise between 1.5 and 2.5 degrees. This is a problem because the region not only already faces summers of 42 to 45 degrees on average but also because heat will not increase evenly. Instead, as already visible now, it will face extreme heat waves whereby temperatures will regularly climb over the level where it is still tolerable for human beings.<sup>4</sup> Under these circumstances, water resources will decrease by 20% and rainfall by 10 to 20% by 2040. This means that the region will face significant water problems: with the exception of Egypt, all states in the southern neighbourhood are at water crisis risk – Lebanon even ranking second in the world, just behind Qatar. Between 60 and 100% of populations in the region are exposed to very high surface water stress. By 2030, water demand is to increase between 13% in Lebanon and 92% in Egypt. It is therefore no coincidence that respondents to the Survey singled out water security as the highest priority to be addressed (see graph 1).

3. World Resource Institute, "Aqueduct tool", <https://www.wri.org/aqueduct/>

4. R. Varela et al., "Persistent heat waves projected for Middle East and North Africa by the end of the 21<sup>st</sup> century", PLOS One, 17 November 2020, <https://journals.plos.org/plosone/article?id=10.1371/journal.pone.0242477>. UNDP Lebanon, "Goal 13: Climate action", <https://www.lb.undp.org/content/lebanon/en/home/sustainable-development-goals/goal-13-climate-action.html#:~:text=Droughts%20are%20already%20more%20frequent,of%20renewable%20water%20by%202030.&text=Lebanon%20is%20also%20vulnerable%20to,increasing%20due%20to%20climate%20change>

**Graph 1: Q.19 Priority measures to face climate and environmental change in the Mediterranean (Ranked as first option)**



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

Although big differences exist between states in terms of preparedness, overall measures to manage extreme heat waves or water shortages are insufficient. In large part, this is because states in the region share with their populations a very low sense of urgency when it comes to climate change – a perception which stands in stark contrast to the magnitude of the problem. While states are poorly prepared for the first order effects of climate change, they are even less prepared for the knock-on effects this will have – for instance on agriculture (Tunisia’s olive production, for instance, will be cut in half under the current conditions<sup>5</sup>). In contrast to other world regions where industry is the main user of water, the southern neighbourhood’s agricultural sector is the one drawing most water, at 70%.

States in the region share with their populations a very low sense of urgency when it comes to climate change – a perception which stands in stark contrast to the magnitude of the problem.

5. Food and Agricultural Organization of the United Nations, “Tunisia’s olive production could halve by 2030 due to climate change”, 2015, <http://www.fao.org/family-farming/detail/en/c/350689/>. “Solutions to water challenges in the Middle East and North Africa region”, <http://www.fao.org/fao-stories/article/en/c/1150870/>

Improving infrastructure, reuse of wastewater and harvesting rainwater are measures to enhance water management as one of the first priorities in the preparation for climate change.

## But solutions do exist

One of the first priorities in the preparation for climate change's unavoidable fallouts is of course water and its management. At the moment, water is over-exploited because governments have failed to implement incentives to curb water consumption and promote conservation. Pricing water as a service rather than a commodity could be an incentive to treat it more carefully. Improved infrastructure, such as through the reduction of leakage or pipe pressure are additional measures, but more important is a change in how water is treated by the agricultural sector in particular.

The problem is, however, that this is not enough: even a reduction of agricultural water use by 30% would reduce the water stress for only about 3% of the currently exposed population. This means that this measure alone is not enough. Water will have to be saved and generated elsewhere. One example is the reuse of wastewater: in the region overall, 82% of wastewater goes unused (with the exception of Jordan, which reuses 90%), so the potential is enormous.<sup>6</sup> In addition, harvesting rainwater in cisterns and wells is an interesting option particularly for city dwellers. Because domestic use ranks second in the regional use of water, citizen behaviour will be an important ingredient in reducing water use.

Europe can be instrumental in facing these challenges. Since change of behaviour – be it at home, in cities or in the agricultural sector – stands at the centre of tackling the water crisis, engagement with civil society but also with the municipal level, where most of the water use increases are expected, will be crucial. The Survey supports this approach, and finds some applicability for conditionality in this regard.

## Leveraging the energy transition

Climate change will bring more challenges for the region in the energy sector, in two different ways. Firstly, more energy will be needed because both populations and industrial activity will grow. By 2030, demand will have increased by 55% compared to today.<sup>7</sup> In addition, more cooling will be needed to face increased temperatures. In Saudi Arabia, air conditioning currently swallows 51% of total electricity demand in the summer, giving us a frightening preview of what could become the norm in the southern neighbourhood, too.

But not just more energy will be needed as the region faces the fallout of climate change: the global energy market itself will shift towards renewable energy. For

6. World Bank, "Beyond Scarcity : Water Security in the Middle East and North Africa", 2018, <https://openknowledge.worldbank.org/handle/10986/27659>

7. BP, "BP Energy Outlook – 2019. Insights from the Evolving transition scenario – Middle East", <https://www.bp.com/content/dam/bp/business-sites/en/global/corporate/pdfs/energy-economics/energy-outlook/bp-energy-outlook-2019-region-insight-middle-east.pdf>

oil-exporting states like Algeria and Libya, this means that they will lose an important source of their income. The fiscal crisis Algeria faced in early 2021 as a result of a low global oil price was only a preview of a situation that will become the norm as Europe shifts increasingly towards renewable energy: by 2030, Europe will have halved its imports from fossil fuels.<sup>8</sup>

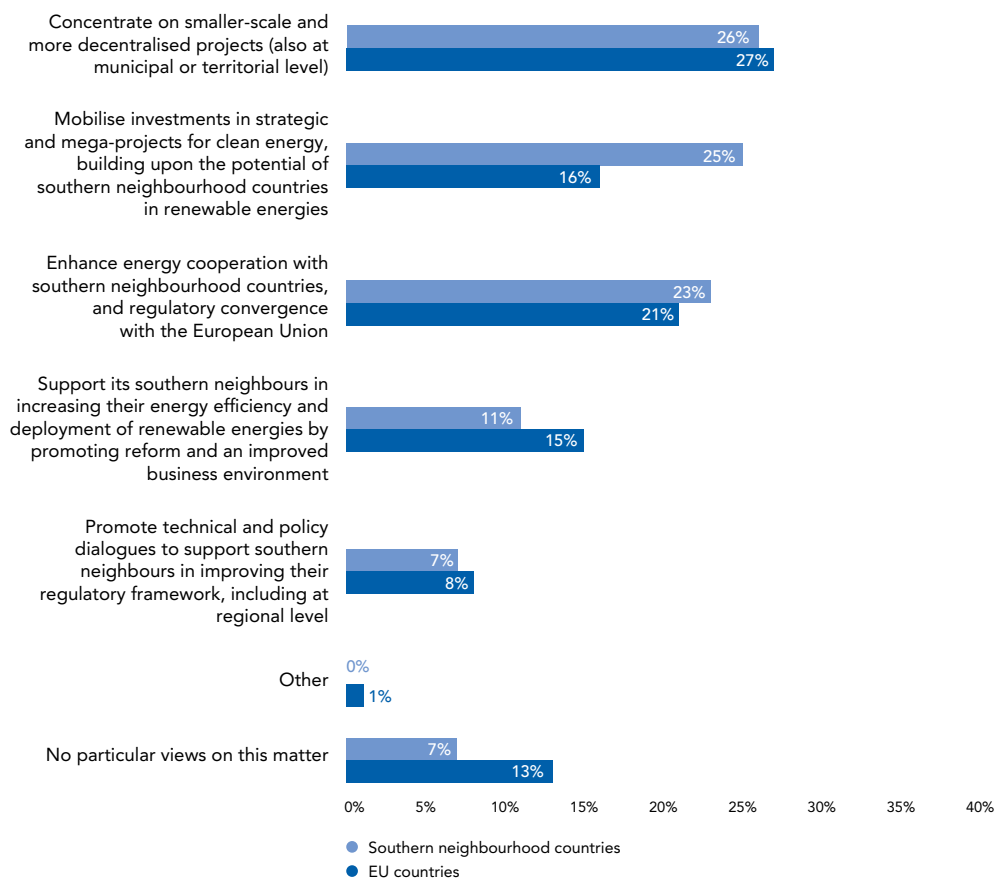
But renewable energy may very well be the answer to both problems. As mentioned above, it currently plays no significant role in the regional energy mix with 4% (of which a negligible amount stems from solar power) – but more than 95% of the potential remains untapped. Its geographical location might come with the challenge of heat, as it is flanked by an abundance of sunshine and wind. This means that transiting to renewable energy is not just feasible for the region but is indeed an interesting opportunity.<sup>9</sup> This could be an explanation as to why in the Survey southern neighbourhood respondents are more prone than European Union (EU) participants to consider the mobilisation of investments in strategic and mega-projects on renewable energy as their top priority (respectively, 25% and 16%). Not only could the region meet its own energy needs but it could even export surplus energy once a solution to the transport question is found. In addition, renewable energy would allow for a decentralisation of energy generation, meaning that individual and remote households will be able to either contribute to generation or be self-sufficient. This is currently already trialled in conflict zones such as Libya, where hospitals are powering themselves with solar panels. Of course, an end to oil exporting could have other political consequences as it would lead to a diversification of national budgets and with it, perhaps, to a diversification of the political landscape.

Renewable energy may be the answer to face the increase energy demand. Transiting to renewable energy is not just feasible for the region but is indeed an interesting opportunity.

8. IRENA, "A New World: The Geopolitics of the Energy Transformation", January 2019, <https://www.irena.org/publications/2019/Jan/A-New-World-The-Geopolitics-of-the-Energy-Transformation#:~:text=Chaired%20by%20former%20President%20%C3%93lafur,%2C%20trade%2C%20environment%20and%20development>

9. Arman Aghahosseini, "Towards sustainable development in the MENA region: Analysing the feasibility of a 100% renewable electricity system in 2030", Energy Strategy Reviews, Volume 28, March 2020, <https://www.sciencedirect.com/science/article/pii/S2211467X20300201#:~:text=Electricity%20demand%20is%20assumed%20to,to%20the%20year%202030%2C%20respectively>

**Graph 2: Q.18 What should the European Union do to accompany the energy transition of the southern neighbourhood countries? (Ranked as first option)**



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

The southern neighbourhood is still far from ready for the coming transition. Europe's technical know-how and investment could play an important role in pushing the transition forward.

Although acceptance of renewable energy is beginning to grow in the southern neighbourhood, it is still far from ready for the coming transition. At the moment, only three countries in the region – Algeria, Tunisia and Morocco – have set targets for the sourcing of solar energy, and overall only Morocco and to a lesser extent Jordan have truly embraced renewable energy.

As the Survey respondents say, this is where Europe's technical know-how and investment could play an important role in pushing the transition forward. As in the case of water management, conditionality is not likely to yield the best results: here, lack of funds and technical knowledge will not be generated through it.

## Decreasing CO<sub>2</sub>

Lastly, the Middle East and North Africa has made too few efforts to decrease CO<sub>2</sub> emissions but instead they have grown to the point of now nearing Europe's levels. Although the biggest polluter, Saudi Arabia, is not part of the southern neighbourhood, Egypt, the second biggest, is. Egypt is the 25th biggest polluter worldwide and the biggest in Africa. As we have seen above, a projected rise in energy demand means that this is likely to continue if no measures are taken. Around 85% of the greenhouse gas emissions come from energy production, electricity generation, the industrial sector and domestic energy consumption.

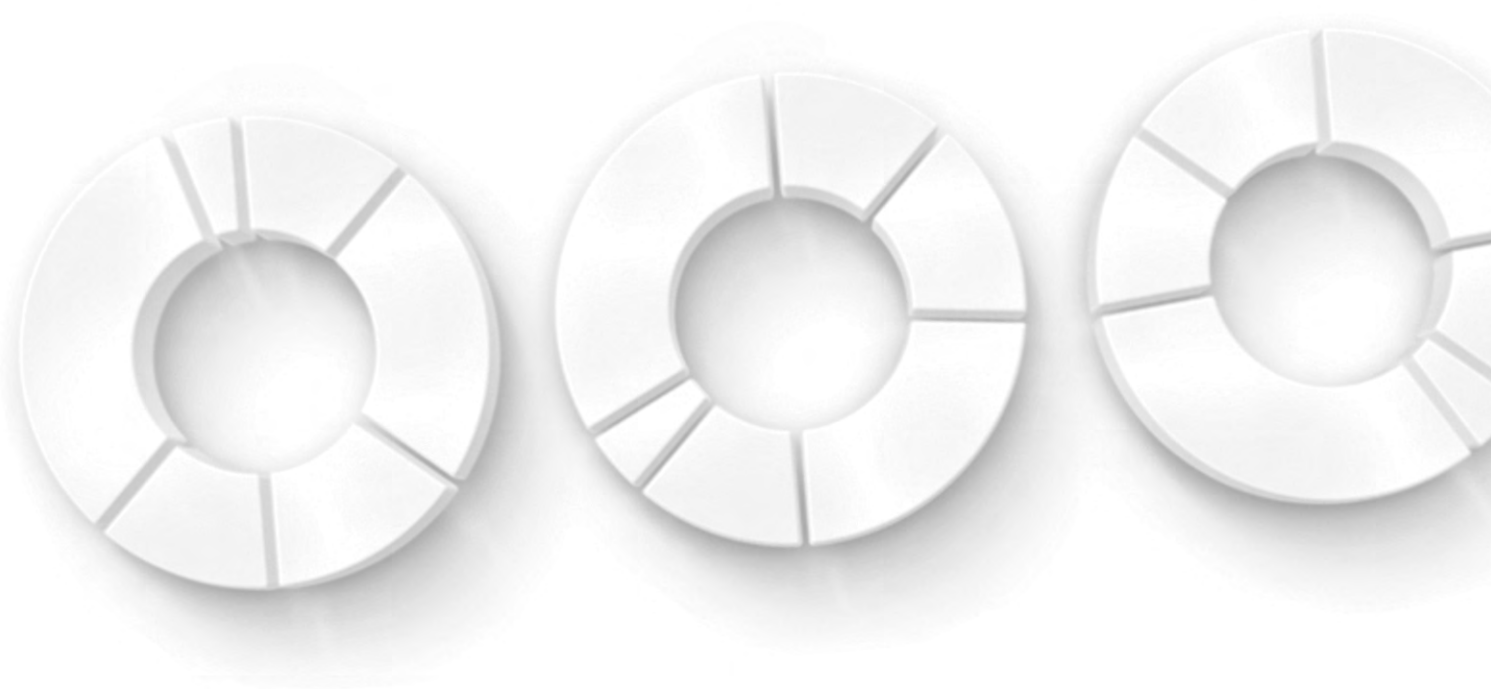
There are several ways in which these emissions can be reduced. Firstly, energy efficiency can be significantly increased. Unfortunately, one hurdle on the way is the reduction – or even cancelling – of electricity and fuel subsidies. At the moment, most states in the region not only spend significant portions of their gross domestic product (GDP) on subsidies but they thereby also encourage wasteful consumption. The extremely high energy intensity and electricity consumption per capita is the result of this: Egypt ranks before Sweden or Poland, Jordan, Lebanon and Tunisia before Slovenia or Lithuania. These subsidies also prohibit private investment in alternative technologies – such as solar panels on a roof – as there is no need to find cheaper sources of energy. In part, this is because national energy efficiency strategies hinge on stable sources of financing and legislation, which many states in the region lack.

In addition, the region's transport sector is not only responsible for a third of the CO<sub>2</sub> emissions, but presents a lot of room for improvement. Although most states in the region have strategies in place to improve public transport, these do not include energy reduction targets or reforms for the transportation sector. For instance, there are no tax reductions on hybrid cars, no enforcements of vehicle emissions regulations, and no promotion of public transport. Most of the latter are buses, which could be switched to battery-operated, or alternatively compressed natural gas and parallel-hybrid electric. A more sustainable and long-term solution to not just CO<sub>2</sub> emissions but congestion and pollution would of course be a train system like the tramway in Rabat or the subway in Cairo. A recent proposal for a coastal metro system in Lebanon would not "just" reduce CO<sub>2</sub> emissions but also create jobs in the process of construction, and stimulate the economy by freeing up circulation. Indeed, creating green and sustainable jobs is identified as an important priority in the Joint Communication on the renewed partnership with the southern neighbourhood and it would be one of the main challenges for Euro-Mediterranean cooperation in the years to come.

In all of these areas, Europe not only has expertise but also the capacity to engage in order to accelerate reform efforts.

Taken together, all three priorities are areas in which the EU has garnered significant experiences over the last decade, and is therefore well-placed to assist. Perhaps crucially, all these areas present not just challenges but also opportunities. A move to a cleaner, more affordable, energy source, improved use of water and electricity, and a cleaner environment would not just protect from climate change but indeed ready the region for a better future.

Increasing energy efficiency and improving the transport sector are key to reduce CO<sub>2</sub> emissions. Therefore creating green and sustainable jobs is one of the main challenges for Euro-Mediterranean cooperation in the years to come.



# Digital Transformation in the Southern Neighbourhood

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The ongoing COVID-19 pandemic, what with the lockdowns and travel bans, has manifested in no uncertain terms the significance of digitalisation processes. While the digital transformation of economies has been recognised as one of the cornerstones of sustainable development for some time now, it was only last year when its importance for day-to-day functioning of societies became quite so obvious. In the southern neighbourhood region, in many ways this has been a painful lesson to learn.

Despite progress made over the past decade, digitalisation levels, as measured by the Network Readiness Index (NRI; Dutta & Lanvin [Eds.], 2020), have remained unsatisfactory in all countries in the European Union (EU)'s southern neighbourhood, with a notable exception of Israel, which – as an outlier – will not be covered in the present article. Ranked between 69th (Jordan) and 107th (Algeria) out of 134 countries surveyed, the states in the region are all positioned in the lower bottom of the NRI. Their performance is not homogenous, however. For instance, while throughout the southern neighbourhood relatively best results can be observed in the “People” pillar, in Algeria, Egypt, Morocco and Tunisia it is predominantly due to relatively good performance in the “Government” sub-pillar, but in Jordan the highest rank was achieved in “Businesses” and in Lebanon in “Individuals”.

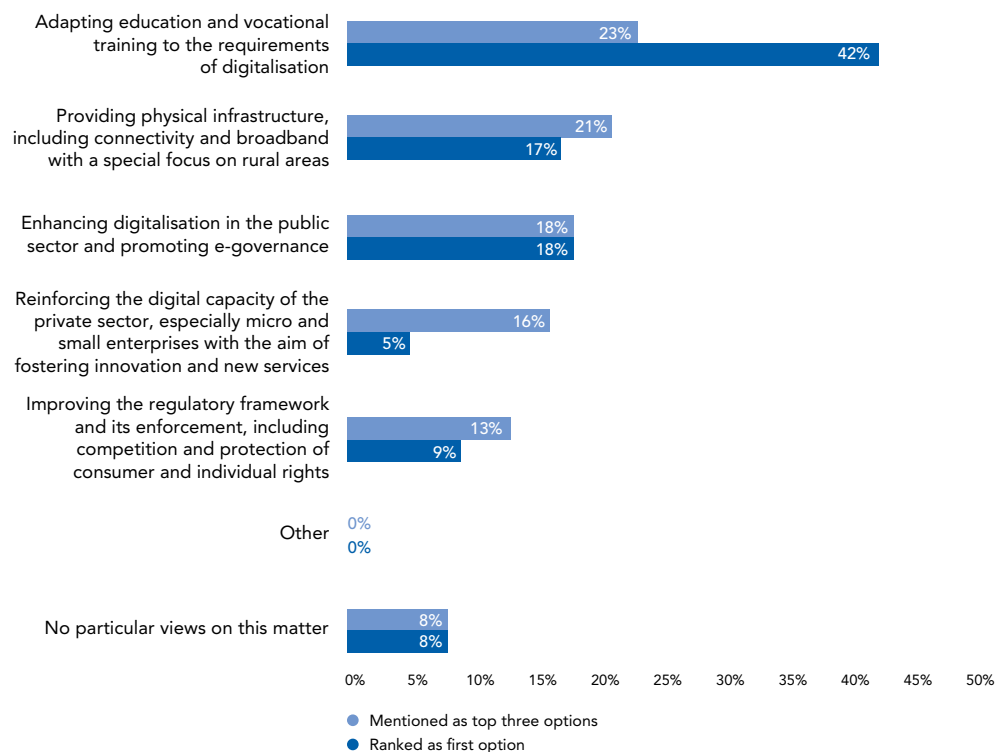
Despite progress made over the past decade, digitalisation has remained unsatisfactory in all countries of the European Union's southern neighbourhood.

## Obstacles to Digitalisation Processes

As noted by the respondents to the EuroMeSCo Euromed Survey, in order to improve this situation and accelerate the digitalisation agenda in the region, it is crucial to strengthen the southern neighbourhood countries' performance in a number of fields, including education (a top priority for the plurality of respondents), e-governance, infrastructure, regulatory framework, and private sector preparedness levels.

Adapting education to digitalisation requirements is seen as a priority to accelerate digitalisation.

**Graph 1: Q.16 Most effective ways to support a digitalisation agenda in the southern neighbourhood countries (all respondents)**



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

## Digital Divide

There are noticeable disparities in usage rates of internet along socioeconomic, demographic and geographical lines.

On an individual level, in 2019 the share of population using internet across the region ranged from 57% in Egypt and 60% in Algeria, through 67% in Jordan and Tunisia, up to 71% in West Bank and Gaza, 74% in Morocco, and 78% in Lebanon – compared to 82% in the EU (2018) and 47% in middle income countries on average (World Bank, 2020). At the same time, there are noticeable disparities in usage rates along socioeconomic, demographic and geographical lines.

For instance, while on average 58.5% of men in the Arab states use internet (in line with the global average of 58%), the same is true for just 44.2% of women (below the global average of 48%; ITU, 2020). In a worrying trend, the gender internet penetration gap widened between 2013 and 2019 by 5.2 percentage points (by way of comparison, in Europe it decreased by 4.1 percentage points over the same period). Even more noticeable is the digital divide between youth and older adults. The internet usage gap between those aged 18-29 and 60+ stood at 47% in Lebanon, 62% in Palestine, and a whopping 81% in Egypt (Raz, 2020). Less severe but nevertheless pronounced divergences also exist along educational and urban/rural

lines; for instance, the gap between urban and rural internet usage varies from as little as 3% in Lebanon up to 21% in Morocco (Sidlo et al., 2020; Raz, 2020).

## Infrastructure

The above discussed differences result from a number of factors, lack of adequate infrastructure being one of the more significant ones. While 91% of the population in Arab countries is covered by some kind of a mobile network (predominantly LTE or higher; ITU, 2020), the fixed broadband coverage remains more limited, and so overall the internet connection in the southern neighbourhood remains relatively expensive and slow.

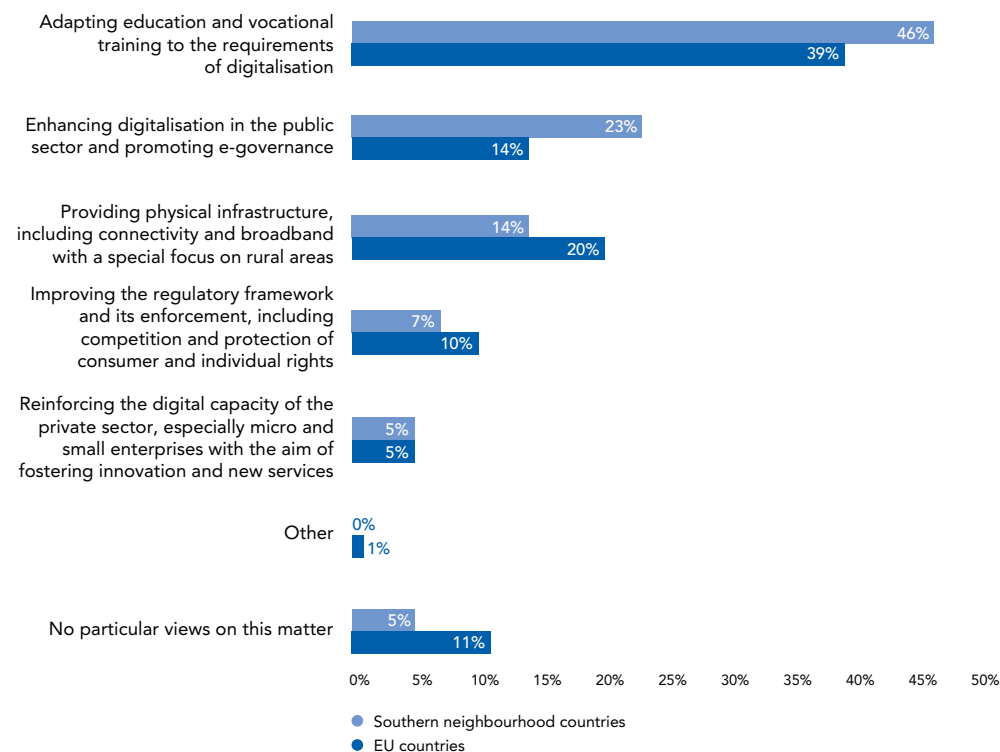
## Digital Literacy

An at least equally if not more critical barrier to embracing new technologies among populations of the southern neighbourhood countries is lack of digital skills. Indeed, the respondents to the EuroMeSCo Euromed Survey (especially those hailing from the southern neighbourhood) unilaterally emphasised adapting education and vocational training to the requirements of digitalisation as the most effective way to support the digitalisation agenda in the southern neighbourhood.

Pronounced divergences also exist along educational and urban/rural lines.

Adapting education and vocational training to overcome lack of digital skills is seen as the most effective way to support the digitalisation agenda.

**Graph 2: Q.16 Most effective ways to support a digitalisation agenda in the southern neighbourhood countries (Ranked as first option)**



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

The data available supports their observations. According to the International Telecommunication Union, basic digital skills, such as writing and receiving e-mails, are held by fewer than one in four persons in Algeria and Tunisia, and 50-75% in Morocco, Egypt and Lebanon (no data available for Jordan; ITU, 2020). Between 15-35% of the population in Algeria, Lebanon and Tunisia, and 35-55% in Morocco and Egypt are in possession of standard skills, e.g. using basic formulas in spreadsheet, while just 5-10% of society in Morocco, Algeria, Egypt and Lebanon, and 10-15% in Tunisia, have advanced ICT skills. Once again, the situation across the region is far from homogenous, however. The aforementioned NRI places countries in the southern neighbourhood between 23rd (Lebanon) and 88th (Morocco) out of 141 countries surveyed in terms of level of digital skills among active population. This poor performance is one of the reasons why, outside of Jordan and Lebanon, employees have serious difficulties finding employees with adequate skill sets (Schwab [Ed.], 2019).

## Regulatory Framework

While not seen as the top concern, the need to improve the regulatory framework and its enforcement, including competition and protection of consumer and individual rights, was demarcated as one of the top three priorities by 13% of all respondents (see graph 1). The NRI ranking confirms that the ICT regulatory environment in the southern neighbourhood is still underdeveloped and governments in the region are not fast enough in adapting legislation for emerging technologies. Jordan, which scored highest on this measure among all the countries in the region, ranked 46th (out of 127 countries ranked), while the worst performer was Morocco – 90th. Indeed, although all countries in the southern neighbourhood already have in place some kind of regulations allowing for use of e-documents and (save for Jordan) have some kind of online consumer protection laws in place, an adequate legislative framework for data protection and cyber security is yet to be developed in the region (Jaller & Molinuevo, 2020).

Improvement of the regulatory framework, promotion of e-government and adoption of digital applications for key business management functions are the main obstacles to be faced.

## E-governance

There is also a serious need for governments, as noted by one in five respondents to the EuroMeSCo Euromed Survey, to enhance digitalisation in the public sector and promote e-governance (see graph 1). The quality of e-government platforms, for instance, more often than not leaves much to be desired. Indeed, under one of the NRI measures assessing the quality of a government's delivery of online services (on a 0-1 scale where 1 indicates best performance) the best performer among the southern neighbourhood countries scored 0.62 (ranking 81st out of 133) and the worst, Algeria, 0.28 (ranking 127th).

## Private Sector Preparedness Levels

The private sector in the region, especially micro, small and medium enterprises (SMEs), has also been finding it hard to keep up with the global digitalisation trends. Before the outbreak of the pandemic, relatively few SMEs in the southern neighbourhood possessed a website or a Facebook page, or offered digital payments. The level of adoption of digital applications for key business management functions in the southern neighbourhood was also lower on average than in other middle-income countries on average (for more details on obstacles to digitalisation of SMEs in the region, see Sidlo et al., 2020). That said, progress has been made, at least in the realm of appreciation of the importance of digitalisation. Indeed, since 2017 (when this indicator began) one of the largest improvements in terms of the perception of entrepreneurs on digital skills globally has been made in Egypt (Schwab & Zahidi, 2020).

## Impact of the COVID-19 Pandemic

Indicators such as e-payments, online shopping and video streaming show that the pandemic has accelerated the speed of digitalisation in the region.

As has already been mentioned, the way in which the ongoing COVID-19 pandemic prevented normal functioning of societies and economies underlined how important the use of modern technologies is, and – as anecdotal data already shows – accelerated the speed of digitalisation processes around the world. One discernible example illustrating the pace of change is the increase in the use of e-payments across the region. In Jordan, the number of e-wallets opened within the Jordan Mobile Payment (JoMoPay) system increased between January 2020 – just before the outbreak of the pandemic in the region – and January 2021 more than twofold, from JOD 642,356 (around €745 thousand) up to JOD 1.32 million (around €1.54 million; JoPACC, 2020; JoPACC, 2021). Over the same period, the number of transactions conducted in the country with the use of e-wallets went up from JOD 374,400 to 1.39 million and their value from JOD 27.5 million up to JOD 114 million (around €32 million and €133 million, respectively). When the first national lockdown was imposed in the country in March 2020, that very month Jordanians made more e-payments than during the preceding three years combined. Increasing use of e-wallets was also noted in Palestine and Egypt as well; in the latter, the number of e-payments went up by 15-20% just between March and August 2020 (Moslem, 2020).

Another confirmation of the trend can be found in the results of the latest wave of the Arab Youth Survey (2021), which show that during the pandemic young people in the Arab world not only use the internet ever more often to entertain themselves, e.g. by streaming videos (increased by 67%), but also more frequently shopping online (50%) and making contactless payments (49%).

## Going Forward: Main Opportunities and Threats

The digitalisation agenda in the southern neighbourhood (and beyond) should be undertaken with caution: enforcing adequate data privacy, and providing physical infrastructure, with a due focus on rural areas (as well as smaller cities).

The pandemic-induced acceleration of digitalisation processes in the southern neighbourhood region is on many accounts a positive development and a step towards more sustainable economies and inclusive societies. However, there are also a number of pitfalls to avoid. For instance, a shift to telework could on the one hand open up opportunities for women in the southern neighbourhood, who as of 2019 made up only one fifth of the region's labour force but, on the other, keep women within households and slow down their integration into the male-dominated world of paid work even after the pandemic ends and working from home is no longer a necessity. Similarly, the digital divide – not just between women and men but also poorer/more affluent, urban/rural and more/less educated segments of population – may broaden even further if properly designed policies are not put in place.

Another threat is that of digital authoritarianism, as pointed out by some of the respondents to the EuroMeSCo Euromed Survey and half of the experts polled by the PEW Research Center, who feared that the accelerated pace with which new technologies are used will “weaken democracy between now and 2030 due to the speed and scope of reality distortion, the decline of journalism and the impact of surveillance capitalism” (Anderson & Rainie, 2020).

Supporting the digitalisation agenda in the southern neighbourhood (and beyond) should therefore be undertaken with caution. Enhancement of digitalisation in the public sector and promotion of e-governance – yes, but as long as adequate data privacy and protection legislation is enforced. Providing physical infrastructure, including connectivity and broadband – absolutely, but as pointed out in the Survey itself, with a due focus on rural areas (as well as smaller cities). Adapting education and vocational training to the requirements of digitalisation – by all means, as long as it does not entail exclusion of students who will not be able to participate because of limited access to broadband and/or computers. To paraphrase a popular pandemic-time saying, “the cure cannot be worse than the problem”.

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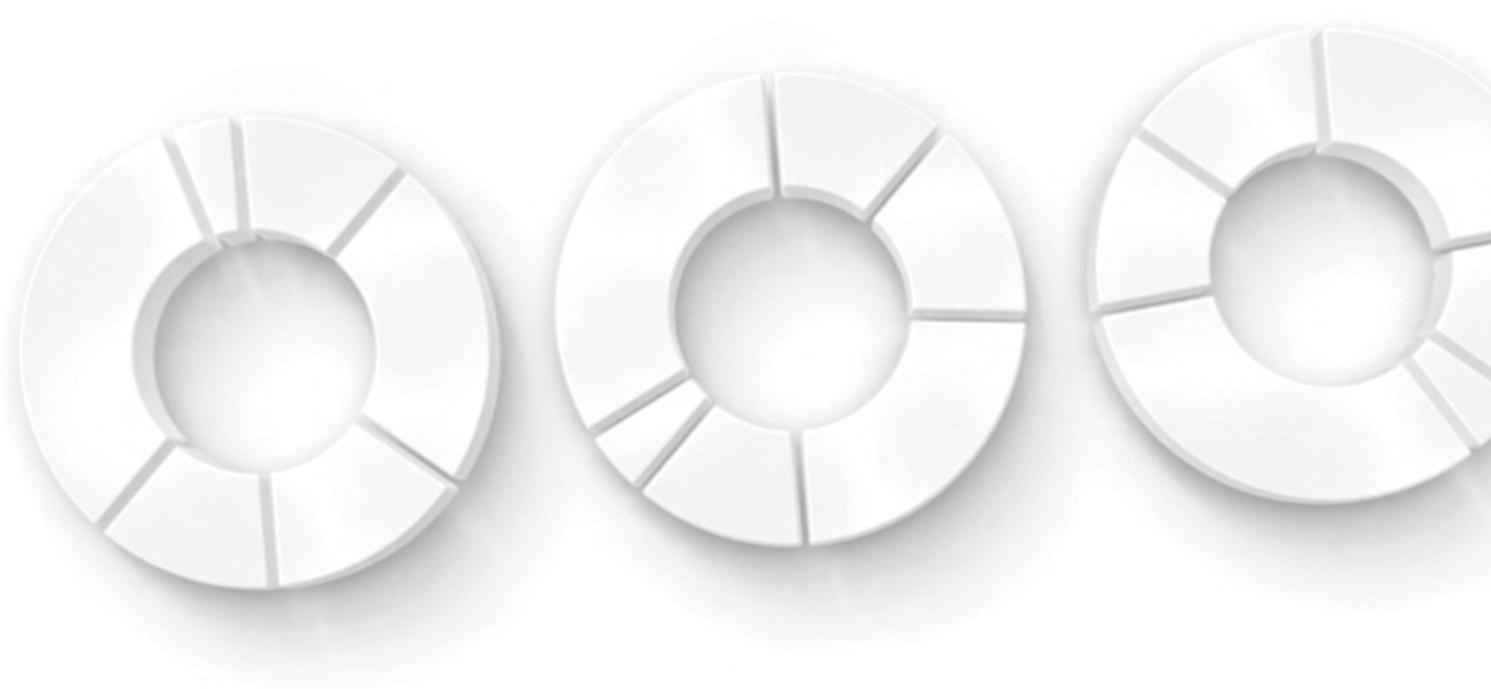
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# The New EU Agenda for the Southern Mediterranean: Prospects for Morocco<sup>1</sup>

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Over 25 years after the launch of the Euro-Mediterranean Partnership (EMP) in the 1995 Barcelona Conference, the Mediterranean geographical area continues to be subject to the reflection and conceptualisation of the European Union (EU) with the aim of firmly establishing this strategic neighbourhood relationship and addressing the progress of the inherent challenges.

Since then several initiatives have marked the Euro-Mediterranean framework as stages on the path that claimed to be the result of a joint reflection, i.e. a dialogue between the two shores of the Mediterranean on the future of relations between the EU and its southern neighbourhood.

Thus, in the case of Morocco, the Association Agreement signed with the EU in 2000 preceded by several years the launch of the European Neighbourhood Policy (ENP) in 2004 and the implementation of an Advanced Status of Morocco in the Mediterranean space in 2008. Indeed, this evolving process reflects the EU's concern to define a framework adapted to manage its relations with the southern neighbourhood – following the consecutive enlargements of the EU – but also and mainly to reposition itself politically and strategically on the southern side. Actively engaged in the different Euro-Mediterranean fora (Mediterranean Forum, Forum 5+5), Morocco in its turn has always sought a differentiated treatment in its relations with the EU. The consolidation of the *acquis* and the opening of prospects toward co-responsibility and co-decision are among the main components of the Moroccan approach in order to advance the Euro-Mediterranean integration process.

After 25 years the Mediterranean geographical area continues to be subject to reflection with the aim of firmly establishing this strategic neighbourhood relationship and addressing the progress of the new challenges.

1. The interviews used in this articles were conducted by Youssef El Jai, Research Assistant in Economics, PNCS.

Actively engaged in the different Euro-Mediterranean fora, Morocco in its turn has always sought a differentiated treatment in its relations with the EU.

The geopolitical changes in the region led the EU to reassess in 2011 and 2015 the contents and the mode of management of the ENP in order to address the challenges posed by a changing neighbourhood. Nevertheless this concern with adaptation and renewal went hand in hand with a questioning of the southern countries over their weak involvement in the conceptualisation and monitoring of the EMP and the limited effectiveness of their inclusion to ensure a space of common values and shared prosperity. We could henceforth ponder the effectiveness of the partnership approach of the ENP, notably after the successive reassessments in 2011 and 2015, and evaluate in a second step the scope of the new European offer presented in February 2021 as a “renewal”. Finally, and in the framework of this new European agenda for the southern neighbourhood, could we consider the opportunity of defining the spheres of innovative and promising cooperation that can achieve a convergence of approach and strengthen the effort to “renew” Morocco-EU relations?

## Contextualisation of Morocco-EU Relations in the Framework of the ENP

Morocco has long-standing and privileged relations with the EU, marked since the implementation of the ENP and its different revisions.

Morocco has long-standing and privileged relations with the EU, marked since the implementation of the ENP and its different revisions by a dynamic evolution and the joint desire to build an exemplary partnership in the Euro-Mediterranean region.

The adoption in 2008 of the Advanced Status and the signing in March 2015 of its Action Plan for its implementation have defined the shared ambition of consolidating the multi-dimensional nature of the partnership. Structured around four axes (equitable access to social services, democratic governance and the rule of law, employment and inclusive growth, and strengthening the capabilities of civil society), the priorities of the Morocco-EU partnership have profited from a financial support that should amount to €1.4 billion between 2014 and 2020 in the framework of the new financial European Neighbourhood Instrument (ENI), which stemmed from the guidelines included in the Communication of 25 May 2011, advocating a “more funds for more reform” approach.

Following the judgement issued in 2015 by the Court of the EU on the Association Agreement between the EU and Morocco, the political dialogue with the EU would be suspended until 2019.

Signed in November in 2014, the Single Support Framework reflects the EU’s recognition of the singularity of its partnership with Morocco (support for the reforms started in 2011) and emphasises the appropriateness of the cooperation chosen by the EU with Morocco’s strategic priorities. These guidelines also match the objectives of the Framework Agreement on the “Advanced Status and its Action Plan”. Morocco has also benefitted from additional budgetary allocations in the framework of the Multi-Country Programme, allocated according to the progress made in consolidating democracy (European Instrument for Democracy and Human Rights, Development Cooperation Instrument...).

However, and following the judgement issued in December 2015 by the Court of Justice of the European Union for the annulment of the Council decision of 8 March

2012 concerning the conclusion of a deal amending the Association Agreement between the EU and Morocco, the latter suspended the political dialogue with the EU until January 2019. The partnership dynamic affected by this hiatus could not experience a qualitative development despite the continuation of sectoral cooperation. Due to lack of formal political consultations, the partnership did not therefore define any new priority, while the Single Support Framework had expired and a new revision of the ENP had been published in November 2015. Acknowledging the boundaries of the preceding 2011 strategy, based on the principle of “more funds for more reforms”, the 2015 revision advocated a new approach characterised by more flexibility (differentiation) and the intensification of local ownership. With respect to Morocco, the Single Support Framework was extended by the Commission until 2018 and the Advanced Status prolonged until 2020.

The partnership dynamic affected by this hiatus could not experience a qualitative development despite the continuation of sectoral cooperation.

Thanks to the Morocco-EU Association Council, in June 2019, new prospects beyond the Advanced Status were explored in order to achieve a “Euro-Moroccan partnership for shared prosperity”. Following a flexible approach adapted to the two parties, the Declaration issued by the Council also sought to be a preliminary stage to the definition of the strategic axes of Morocco-EU cooperation, which should be operative from 2020. Morocco and the EU are therefore committed to pursuing the joint reflection in order to reshape their contractual bond. Also and despite the period of inaction from 2015 to 2019, the principles stressed in the re-assessment of the ENP, i.e. differentiation and common ownership of the contractual framework, are at the core of the re-launch of the Morocco-EU partnership.

## Towards a Renewed Partnership of the EU with the Southern Neighbourhood? Prospects for Morocco

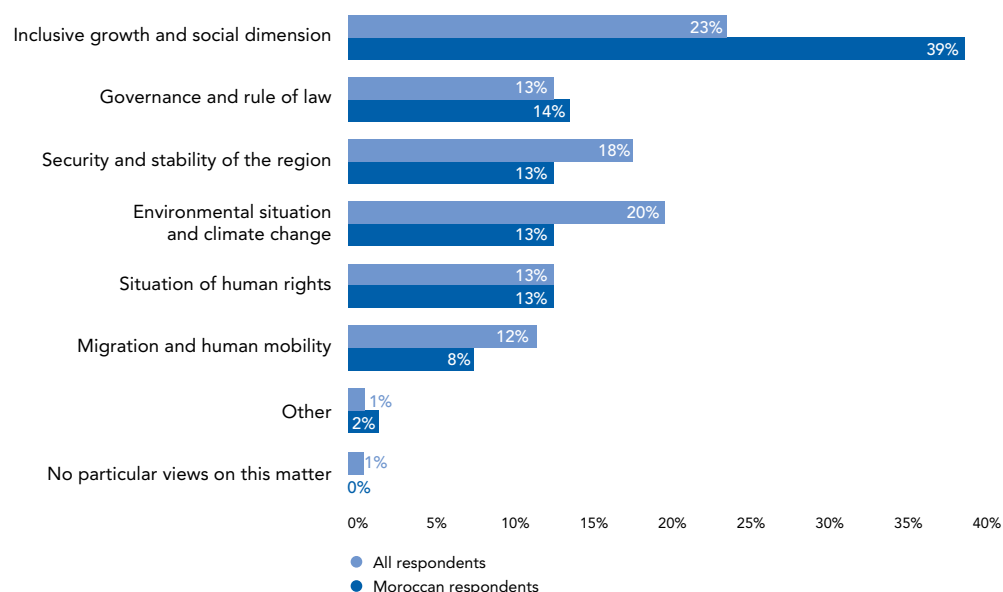
Based on the vision of the Green Deal, the European Commission introduced in the Joint Communication of 9 February 2021 a new southern neighbourhood proposal structured around five key fields: human development, good governance and the rule of law; resilience, prosperity and digital transition; peace and security; migration and mobility; and green transition. The new agenda aims at a green, digital, resilient and fair recovery, guided by the sustainable development programme by 2030, the Paris Agreement and the European Green Deal. By placing the climate and environmental challenges at the core of its action, the new ENP puts forward a new philosophy in the revision of the Partnership: the acquis achieved in the previous phases will henceforth result in a substantial evolution and tangible prospects. It provides for specific proposals in each neighbourhood country that can be transformed into a new roadmap of bilateral relations.

By placing the climate and environmental challenges at the core of its action, the new ENP puts forward a new philosophy in the revision of the Partnership.

The public survey conducted by the IEMed with a sample of the Moroccan population highlights that they see inclusive growth and climate change as challenges and opportunities common to the two partners.

While the findings of the Survey show that economic inclusion and climate change are the main common challenges in the region, the responses of the Moroccan experts attach greater importance to economic inclusion as a challenge (graph 1) and an opportunity (graph 2).

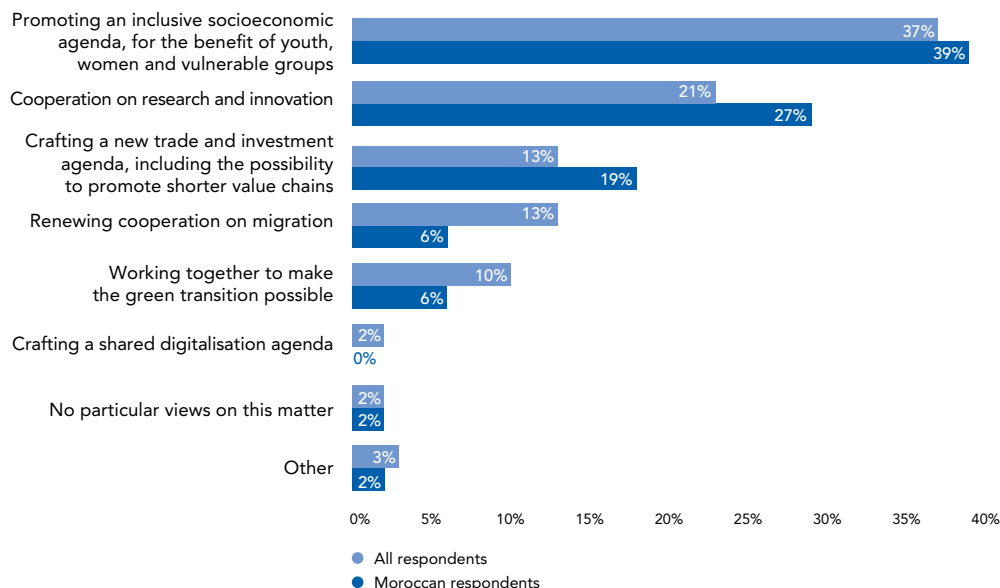
**Graph 1: Q.1 For which of the following challenges are greater efforts needed?**  
(Ranked as first option)



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

In terms of opportunities for both the EU and the neighbouring countries, the promotion of a socially-inclusive agenda is considered the main priority. It is worth noting that the responses from Moroccan experts also underline the importance of cooperation in terms of research and innovation.

**Graph 2: Q.2** What are the main opportunities that the European Union and its southern partners should jointly seize? (Ranked as first option)



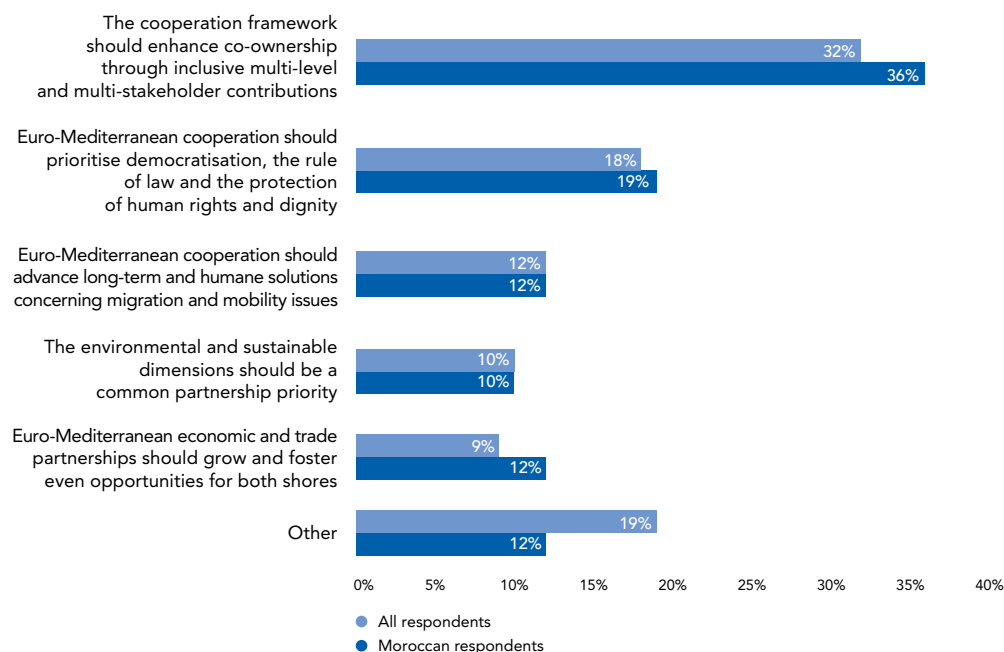
Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

From the official point of view, Morocco has welcomed the Communication of 9 February 2021 as well as its flagship projects, which also meet the priorities of its development policy and the four axes defined in the Morocco-EU "Joint Political Declaration" adopted in June 2019. However, the intentions expressed by Morocco through the declarations and exchanges with the different European leaders prioritise the need to avoid the ENP being solely conceived through the financial prism and for it to aspire to rebuild a balanced and effective partnership with greater involvement of the neighbourhood countries in the decisions.

Coinciding with this element, the Survey shows how the revision of the cooperation framework and the improvement of its governance are seen as the goals to be achieved by 2030.

Morocco seeks to avoid the ENP being solely conceived through the financial prism and for it to aspire to rebuild a balanced and effective partnership with greater involvement of the neighbourhood.

**Graph 3: Q.8 What should change by 2030 in order for you to assess that the Euro-Mediterranean cooperation has delivered?** (Categories developed from the open-ended answers)



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

Morocco wishes its Advanced Status with the EU to also be expressed in the support for joint actions on issues such as the environment, security, migration and regional integration.

For this reason, Morocco wishes its Advanced Status with the EU to not only be expressed in the support for economic and social development programmes but also to ensure a permanent dialogue and joint actions on issues such as the environment, security, migration and regional integration. In this regard in the region, Morocco has most agreements, links and common ground with the European policies and priorities. Thus, the challenge of this new phase of Euro-Moroccan relations is to jointly identify and decide on the support of the EU to back the transition of the Moroccan economy and its orientation towards more sustainable and inclusive modes of production.

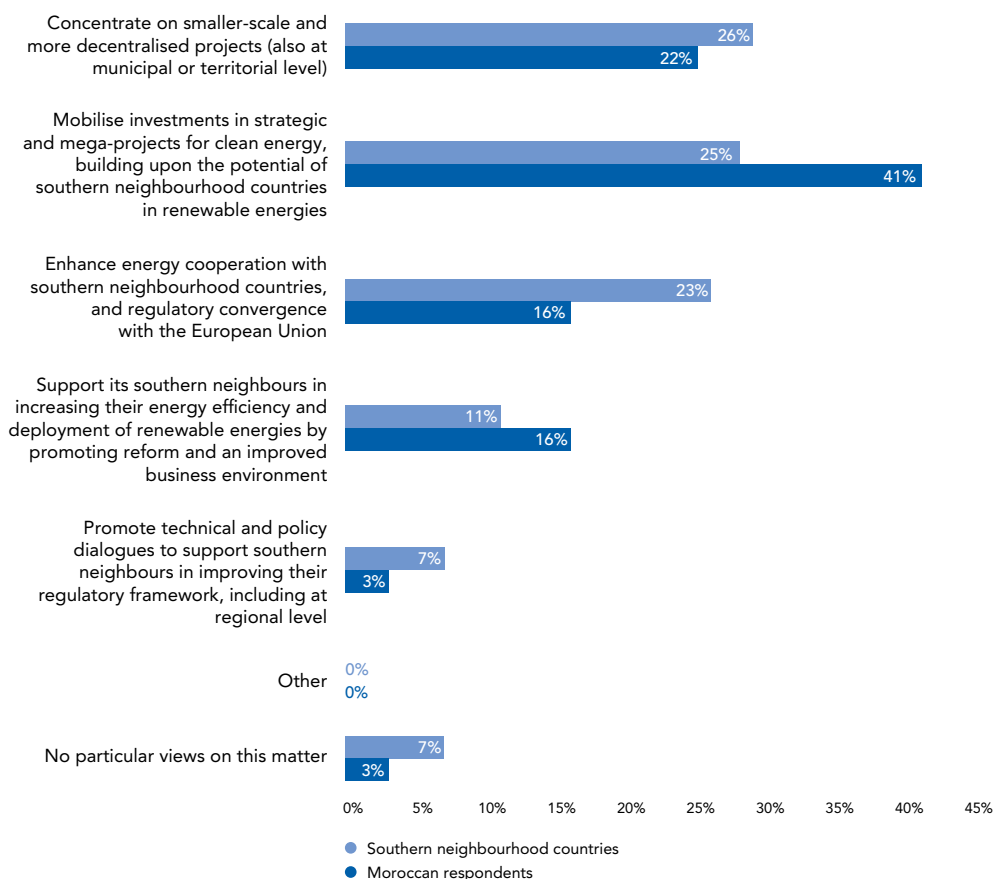
Already engaged in the transformation of its production processes to address the impact of climate change, Morocco could benefit through the new ENP from opportunities to catalyse the green, digital and smart transformation of its economy. In the framework of the transition in Europe towards a more sustainable agriculture, the Green Deal therefore offers promising prospects for the Moroccan agricultural sector. Morocco, after having extensively invested in its Plan Maroc Vert, is preparing the implementation of its new "Stratégie Génération Verte 2020-2030", which would open access to the European market, without limitation of quotas, if the revision of the Common Agricultural Policy (CAP) was effectively implemented. The transition towards a green carbon-free industry could also open prospects for

innovative cooperation. Morocco is firmly engaged in the green transition of its industry by choosing the decarbonisation of its production modes. The main axes of the Industrial Recovery Plan 2021-2023 include the positioning of the Kingdom as a carbon-free and circular industrial base. Morocco has also launched support programmes aimed at industrial enterprises to develop carbon-free production modes and back the emergence of green industrial chains and the reduction of pollution. Finally, the transition towards clean energy is a sector of convergence between Morocco and the EU. Morocco's pro-active energy strategy for 2030 assigns a central place to renewable energies and energy efficiency.

In this respect, the responses from the Moroccan experts also reveal the central role of renewable energies, clearly differing from the responses from the countries in the rest of the region (graph 4).

The transition towards clean energy opens new prospects for innovative cooperation and is a sector of convergence between Morocco and the EU.

**Graph 4:** Q.18 What should the European Union do to accompany the energy transition of the southern neighbourhood countries? (Ranked as first option)



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

With green hydrogen, a technological solution to decarbonise industry, the EU could support the creation of an energy ecosystem and open the way to a substantially innovative partnership.

Beyond the major renewable energy projects with their significant potential for solar and wind energies, Morocco aspires to become a key actor in the development of green hydrogen due to its geographical location, energy interconnections and exceptional renewable energy resources.

Green hydrogen is in this respect a technological solution to decarbonise industry, notably in the production of fertilisers. The EU could in this perspective support the creation of an energy ecosystem around common objectives, as well as translating the points of convergence of the Moroccan-European approaches and priorities, thereby opening the way to a substantially innovative partnership. This dynamic could also influence the respective trajectories of the EU with the partner countries and boost cooperation with the southern neighbourhood in a framework marked by the challenge of innovation, sustainability and growth.

While the Barcelona Declaration aimed to create an area of peace and shared prosperity, over two decades later the Mediterranean region is facing the challenges aggravated by the impact of the COVID-19 pandemic. These challenges demand a new reflection as well as the principle of resilience in all approaches and highlight the need to work for more solidarity, in line with the founding principles of the EMP.

# A Quick Survey of EU-Israel Bilateral Relations 25 Years After the Barcelona Process

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## The Significance of the Euro-Mediterranean Partnership for Israel: Being Associated to the EU

The real take-off in relations between Israel and the European Union (EU) from an institutional (hence not only economic but also political) viewpoint can be dated to the beginning of the Oslo Process (1993) and to the launch of the Euro-Mediterranean Partnership (EMP), now a quarter of a century old. The latter's objective was to provide a general framework for the reinforcement of political, economic and social relations between the two Mediterranean coasts. In this context, Israel was offered an Association Agreement with the EU for an unlimited time period. It is until today the only legal basis for EU-Israel relations since 2000, when it was entirely ratified by the European Parliament (EP), the 15 member states and Israel. Although the agreement properly speaking was signed in November 1995, it took five years to be ratified, basically for political reasons. It created an association council at the ministerial level that had to meet at least once a year. In practice it has not been meeting since 2012, following the actual freeze of political relations more than a decade ago. From the outset, Israel objected to the fact that the association was part of the so-called EMP that continued to treat Israel like other Mediterranean non-member countries, even when the distance between Israel and the rest of the group in terms of economic development had widened over the 1970s through the 1990s.

Israel objected that despite the growing distance in terms of economic development, the Euro-Mediterranean Partnership (EMP) continued to treat Israel like other Mediterranean non-member countries.

## Bilateral Relations After 2004: The European Neighbourhood Policy and Sectoral Agreements

The European Neighbourhood Policy (ENP) was more attractive for Israel in that it was bilateral and differentiated, hence taking the specificities of Israel into account.

Relations between the EU and Israel did not take a new direction until the EU was extended by 10 new countries in 2004. It was not the EMP but rather the widening of the EU and the opening of negotiations with Turkey and Croatia with a view to their membership that led the European Commission (EC) to urgently review its relations with countries in proximity to the new EU-27 by launching the European Neighbourhood Policy (ENP). This policy was all the more attractive for Israel in that it was bilateral and differentiated, hence taking the specificities of Israel into account. This was entirely justified in Israel's perception. The economic gap with the other southern partners of the ENP had widened since the 1990s. And the economic asymmetry between Israel and all other Mediterranean countries (but for Turkey) has been increasing since December 2004 when a tailor-made Action Plan between Israel and the EC was concluded *de facto* in the context of the ENP. At the end of three years, it was evaluated in order for both parties to decide whether there was any reason to alter their mode of relations by signing a new agreement or through an amendment to the 1995 agreement. The Action Plan listed four priorities: reinforce political dialogue; increase economic integration; develop co-operation in justice, policing (legal cooperation, the fight against organised crime) and a whole field of domains (environment, energy, transport, science and technology); and increase *"people to people"* contacts (for example, participation in Erasmus-style educational programmes). What Israel liked most about it was that it was an approach that favoured *"carrots"* over *"sticks"*: the EU would apply a so-called positive conditionality that valued shared values rather than a negative conditionality employed in the context of the 1995 Association Agreement (which contemplated its possible suspension by one of the parties if human rights were not respected by the other party). Even so, as a result of Operation Cast Lead in Gaza, the EU decided to freeze political relations (2009-2010).

Sectoral agreements on agricultural free trade and liberalising civil air transport are in the making with a positive outlook.

By then, however, two important separate sectoral agreements were in the making: one on agricultural free trade between the two parties (2009) and one open-sky agreement liberalising civil air transport traffic between the EU and Israel (entering into force in 2013 and finally ratified by all parties in 2020). According to Israeli official sources, both agreements are working well. Regarding agriculture, there are sometimes discussions about Israel conforming to EU standards, which is normal. In terms of civil air transport, Israel is extremely satisfied. It is now negotiating with the EU so-called *"One-Stop security arrangements"* to reach full recognition by Europe of Ben Gurion Airport security arrangements. More generally, Easyjet, Wizz Air and Ryanair, all of them European low-cost carriers, have become household names to the Israeli tourism industry, which has become a strong supporter of the Open Sky Agreement; not to mention the Israeli consumer of tourism services overseas, who reaps the huge benefits of low-cost travel to Europe. Any Israeli government understands now that it would be very difficult to backtrack and close the country for policy reasons to the winds of cheap overseas travelling.

A latecomer small contribution of the EMP, namely the Regional Convention on Pan-Euro-Mediterranean preferential rules of origin (PEM Convention) of February 2013 did not lead to more regional cooperation in industrial activities between Israel and its Arab neighbours, which was one of its original intentions. Still, Israel is interested in it simply because it helps promote trade with other non-EU members of the Convention, such as Turkey and in the near future the United Kingdom (UK) and the Ukraine (the latter's free trade agreement with Israel entering into force on 1 January 2021). Quite a paradox.

Not all EMP-ENP linked initiatives have been a flop. A particular contribution of the ENP phase in relations between the EU and Israel is in the realm of education, particularly mobility and exchange of university students and academics, namely the different versions of the ERASMUS programme. The EU had financed by 2020 more than 7,000 Israeli students' stays in European universities. There were in 2018 more Israeli students studying in Europe than in the US.

Israel is of course a founding member of the Union for the Mediterranean (UfM), created in 2008 and a sui generis follow-up of the EMP (not of the ENP) and which de facto opened for business only in 2011 with active Israeli input. Still, for several years now it has not had more than symbolic attraction, reflecting a wish to keep a low-profile presence at high-level events. For instance, Minister Amir Peretz, the Minister of Economy, participated as Israel's representative at the 11th Trade Ministerial Conference of the UfM in November 2020, organised as a videoconference.

A particular contribution of the ENP phase in relations between the EU and Israel is in the realm of education, namely the different versions of the ERASMUS programme.

## Working under the Radar or the Story of EU-Israel Day-to-Day Relations in the Last Decade

There is a consensus in Jerusalem that the 1995 Association Agreement is old-fashioned, as illustrated by the fact that it does not deal either with trade in services or investment. But given the ongoing reluctance in the EP to upgrade formal relations with Israel for political reasons, the perspective of un-freezing the Action Plan attached to the ENP is unrealistic. Israel-EU relations have proceeded since 2012 in a piecemeal way.

This is the place to deal with what continues to be a central focus for Israel in the bilateral relationship since the 25 years of the Barcelona Process, namely the practical inclusion of Israel in the EU's R&D space (formally not part of the EMP). Initially, that materialised in the active participation of six out of seven R&D Framework Programmes, followed by Horizon 2020 (as from 2017), nowadays on the verge of being wound up. Negotiations between the EU and Israel to include it in "Horizon Europe", the newest programme, will only start in late 2021, as there have been delays in Brussels unconnected to Israel in drawing the new regulations of the Programme, mainly because of the corona crisis. This round funding will be based on the principle of "Pay As You Go", meaning that countries participating cannot earn money from the Programme. All the same, Israel continues to enthusiastically support participation because of the synergies created between European and Israeli academia and industry.

The practical inclusion of Israel in the EU's R&D space continues to be a central focus for Israel.

Cooperation in the fields of education, communication, environment and in the near future welfare lead to a discrete “Europeanization” of Israel’s regulations.

Without much doubt, both EU educational and research activities and funding have helped the EU in developing among Israel’s civil society a strongly pro-European constituency, made up of Israeli universities and research centres, industrialists involved in R&D activities, academics and university students.

Another non-controversial development in bilateral relations is the activity of the European Investment Bank (EIB), which is very satisfied with Israel as far as innovation funding of activities via Bank Leumi linked to medical equipment and desalinisation plants. More recently, €50 million have been set aside to cope with corona-linked projects. Some of the EIB activities are directly linked to Horizon 2020.

Also under the radar, Twinning and TAIEX activities (introduced under the ENP) are proceeding smoothly, allocated €2 million per year. It leads to a discrete “Europeanization” of Israel’s regulations in the domains of education, communication, environment and in the near future welfare (something hoped for in Israel). Not coincidentally all are areas not connected to security and defence where the influence of the United States (US) is dominant. Twinning brings experts of the EU for 18 to 24 months to liaise with the Israeli public sector, while TAIEX allows for bilateral meetings between European and Israeli officials once in a while, nowadays via Zoom.

In terms of energy, the EU has been funding the feasibility studies, not yet completed, for the construction of the so-called East-Med Pipeline to convey gas from Israel all the way to Italy by 2027. The project is currently blocked because of internal disagreements in Italy about the sheer necessity of such a pipeline in view of the Green Transition Plan in the EU. But in any case the EU Commission seems eager to upgrade its dialogue with Israel’s Ministry of Energy.

In the day-to-day relations between the EU and Israel, a process of clarification of legislature regarding the Occupied Palestinian Territories (OPT) has taken place mostly in the last decade to the dismay of the Israeli government and of many Israelis.

However, the present Israeli government seems to focus much more on a series of developments that, admittedly, do not have great economic implications for Israel or obstruct its relations with Eastern Mediterranean member states such as Greece, Italy and Cyprus. Diplomatically, however, these developments are considered more than a simple annoyance. In the day-to-day relations between the EU and Israel, a process of clarification of legislature regarding the Occupied Palestinian Territories (OPT) has taken place mostly in the last decade to the dismay of the Israeli government and of many Israelis. This is now a fact accepted by the Israeli authorities, clearly unwilling to openly challenge the European side. For instance, in 2016-17 under Mrs. Miri Regev’s stewardship at the Ministry of Culture, it was decided locally to freeze a plan to incorporate Israel in an EU programme called “Creative Europe” as the EU insisted on including in the regulation a provision excluding its application to the OPT, following the precedent of Horizon 2020.

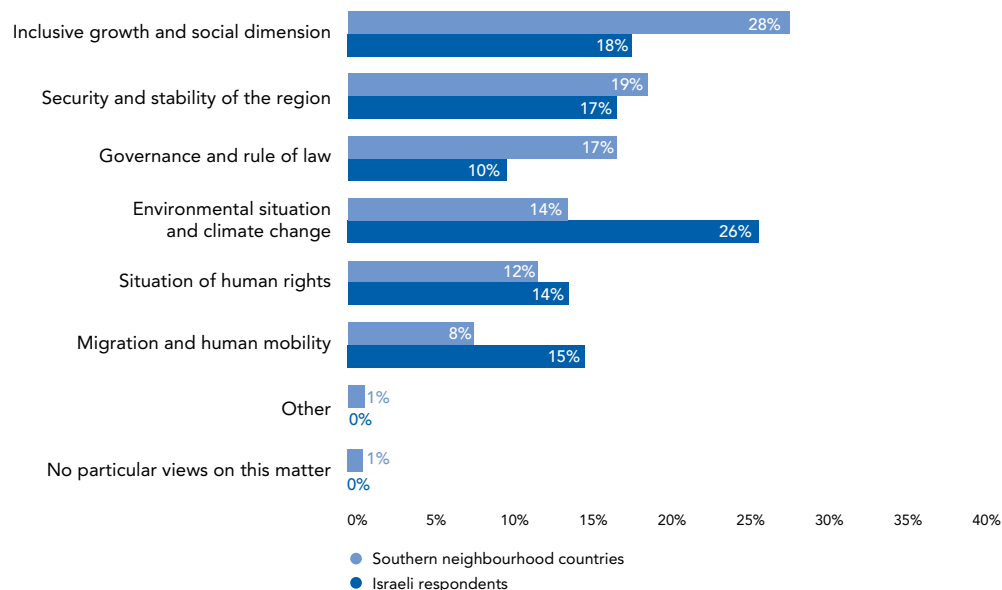
## The New Mediterranean Agenda: What is in it for Israel?

The EMP (also known by the term “Barcelona Process”) and its successor frameworks until the “New Agenda for the Mediterranean” have not drawn much of Israeli public officials’ time and enthusiasm, as explained above. Will the “New Agenda for the Mediterranean” based on a decision of the EU Council of December 2020 change that pattern? A perusal of published documents on 9 February 2021 describing the EU’s new Neighbourhood, Development and International Cooperation Instrument (NDICI) shows that there are only marginal items of interest for Israel, such as the EU’s intention to partially fund the construction of a gas pipeline from Israel to Gaza or the upgrading of the Jordanian Hussein Bridge, linking the West Bank to Jordan and facilitating connectivity between the two sides of the Jordan river. These are two “flagship projects” mentioned in the Agenda. The EU also mentions as a “flagship project” its wish to step up the already extended cooperation with Israel in the areas of digital research and innovation, without specifying beyond that. Even so, there are some Israeli observers that see in the New Agenda some new opportunities for involving the EU in helping to promote intra-regional cooperation among Mediterranean partner states. This moderate optimism is based on the fact that the geopolitical environment has changed for the better in Israel’s views, such as the establishment of political and economic relations with Morocco and several Gulf States. There is a perceived need to continue the dialogue with other Mediterranean countries, as this is something that not only the EU but also the new US Biden administration will probably be keen on. Another aspect in the New Agenda will attract the attention of the Israeli private and public sectors, namely its insistence on involving Mediterranean partners in the EU’s Green Transition and on coping with climate change. Israel is already very closely following the development of green standards in the EU. And the fact that the US has now rejoined the Paris Agreement compels Israel to everything related to climate change in the Mediterranean very seriously. Suffice it to recall here that the EU and the US are by far Israel’s most important markets for its exports of goods and services.

This is confirmed by a quantitative analysis of answers given by the Israeli experts to the EuroMeSCo Euromed Survey, compared to those given by other Southern Mediterranean Countries (SMCs). For instance, climate change is considered a top challenge, while inclusive growth comes only in second place, the reverse happening for the rest of the Mediterranean countries.

The EMP, the ENP and the “New Agenda for the Mediterranean” have not drawn much of Israeli public officials’ time and enthusiasm.

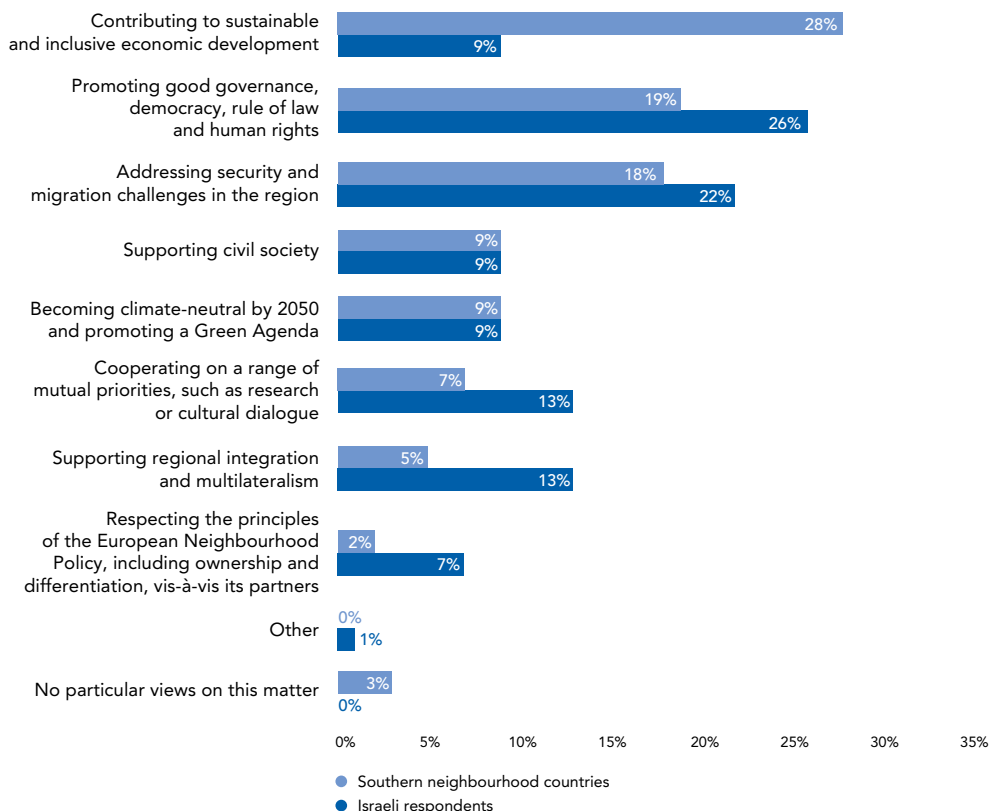
**Graf 1: Q.1** For which of the following challenges are greater efforts needed?  
(Ranked as first option)



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

This is not surprising given the impressive and lasting growth record of Israel since 2003 (more than 3% annually). However, climate change is not considered as an opportunity for intraregional cooperation, probably because as explained Israelis seem more focused on cooperating with the EU and the US on matters related to the Green Transition. Not surprisingly, the EU's added value for Mediterranean Arab countries is the EU's support of their own economic development, whereas Israel is considered by the EU as a developed country already. Hence, Israeli experts mention other possible EU contributions such as the promotion of security, human rights and good governance.

**Graf 2: Q.5 What is the European Union's added value compared to other global players that are increasingly active in the region? (Ranked as first option)**



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

Compared to other SMCs, when asked about future constraints to cooperation, Israeli experts are much more worried than the rest by the meagre perspective of solving enduring conflicts in the Eastern Mediterranean (e.g. Israeli-Palestinian conflict, civil war in Syria, Cyprus conflict and new trends in Turkish foreign policy). Answers of Israeli experts related to the achievement of resilient and sustainable economies clearly relate to other Mediterranean partners, not to Israel proper, for the reasons previously mentioned. Finally, when asked about support for the Green Transition, Israeli respondents are far keener than the average to privilege conditionality to promote green reforms and involve the private sector in the endeavour. Educating future generations about climate change is particularly stressed by the Israeli respondents.

Compared to other SMCs, Israeli experts are much more worried by the meagre perspective of solving enduring conflicts in the Eastern Mediterranean.

A qualitative analysis of individual suggestions made by the latter suggests that some are really done with the future of EU-Israel bilateral rather than intra-Mediterranean relations in mind. Relating to the latter, the need is mentioned for more bottom-up dialogue and concrete projects bringing young people of both sides

of the conflicts in the region. There is a widespread consensus that the EU can help in this task now that the so-called Abraham Accords have open normalisation perspectives with several Arab states (such as Morocco). Other suggestions include the EU's support (political and financial) of the East Med Gas Forum and becoming an observer. The EU, as is strongly suggested by Israeli experts, should also pursue programmes that are deemed a success, such as Erasmus+, Horizon 2020, the Open-Sky Agreement as well as support to pro-peace and pro-democracy non-governmental organizations (NGOs). More ambitious long-term objectives include sharing the agenda on climate change; the promotion of cross-border cultural exchange with all ENP partners; exploring the possibility of associate EU membership for Israel; above all the EU should promote political stability in the Eastern Mediterranean. One particular aspect of this endeavour as seen by Israeli observers is obtaining the help of the EU to ensure personal security and safety, including neutralising the current pandemic by mass vaccination and supporting joint efforts in cyber capacity. A special role is left for the EU as a key player in promoting awareness of issues of privacy, while at the same time fighting cyber-crime and promoting de-radicalisation programmes. Clearly, many Israeli experts consulted for the Survey also seem to expect much from the EU in the field of youth education.

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**MRS. LENA ZEIGER**, Director, Foreign Trade Administration, Ministry of Economy and Industry

**MR. ILAN FLUSS**, Deputy Head, Economic Division, Ministry of Foreign Affairs

**MR. DAN CATARIVAS**, President of the EU-Israel Chamber of Commerce and Director General – Foreign Trade and International Relations at the Manufacturers' Association of Israel.

# Reflections on EU-Jordanian Cooperation: Towards Tertiary Economics

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## Context to EU-Jordanian Cooperation

While 2021 marks the 42nd year of European Union (EU) presence in Jordan, the EU and Jordan solidified their relationship with the 1995 Barcelona Declaration. They did so as parties whose interests might straddle the European/Middle East divide into what might be thought of as the Mediterranean region. The Declaration rested on the pillars of regular political dialogue, the development of economic and financial cooperation, and greater emphasis on the social, cultural and human dimensions. It was born in the early hope of the Oslo Accords, in which the EU sought to buttress the peace process with the economic integration of its key players, among them Jordan. By gradually eliminating tariffs, the Declaration's crowning objective was to establish a free-trade area between the participating Mediterranean partner and EU members (Barcelona Declaration, 1995).

This Declaration would form the basis of the Union for the Mediterranean (UfM), the 42-member body formed in Paris in 2008. The Union brought nearly all EU members together with the Mediterranean Basin states. Twenty-five years after Barcelona, however, parties on both sides of the Mediterranean question its efficacy. EU observers regretted the lack of resolve to see good governance and human rights measures implemented in Mediterranean partner countries (Amirah-Fernandez, 2020). In turn, partner observers tended to cite the EU's preoccupation with Eastern European parties and their inclusion in the EU, much to Turkey's chagrin. There was also frustration with the lack of progress on the Israeli-Palestinian front, the 2008 flare-up of which nearly aborted the Union. The economic prospects also failed to bear fruit when – long after passing its 2010 deadline – the free-trade area was not established.

Underlying the challenges, it seems there was a crisis of Mediterranean identity. Josep Borrell observed that one of the major obstacles to the Barcelona Process

Twenty-five years after the Barcelona Declaration, parties on both sides of the Mediterranean question its efficacy.

It seems there was a crisis of Mediterranean identity and shared goals, and an absence of a Mediterranean “regional will”, exacerbated by the fact that while the EU parties could come together on a united platform, the non-EU parties could not.

was the lack of “common identity and shared goals” among the parties. This translated into an absence of a Mediterranean “regional will”, exacerbated by the fact that while the EU parties could come together on a united platform, the non-EU parties – some of which did not formally recognise each other – could not (Borrell, 2020). The Union yielded to the European Neighbourhood Policy (ENP), which continued the pivot towards Eastern Europe, lightening the weight of Mediterranean representation. Due to the structural challenges of negotiating multilateral consortia, Union parties instead focused their energies on pursuing bilateral relations with each other.

## Expectations of Jordanian Authorities Towards the EU

Jordan rooted its relationship in cooperation on long-standing interests: an outcome to the Palestinian-Israeli conflict and EU-Jordanian trade agreement.

Jordan was among those pursuing bilateral relations with the EU, rooting its relationship in cooperation on long-standing interests. Politically, this mainly concerns an outcome to the Palestinian-Israeli conflict based on Oslo’s two-state framework. The shockwaves of Trump’s Peace to Prosperity Plan would highlight the EU’s moderating role. Days after the Plan was released, Borrell reaffirmed that “Jordan plays a very special role... in particular as regards Jerusalem and as the Custodian of the Holy Sites. We share the commitment to a two-state solution and respect for international law” (Jordan Times, 2020). While the incoming Biden administration endorses a two-state solution, Jordanian authorities are depending on the EU to champion the principle in international fora, especially by ensuring that the West Bank remains viable grounds for a Palestinian state.

Trade represents the chief economic interest between Jordan and the EU. The bedrock of EU-Jordanian trade is the 2002 Euro-Mediterranean Agreement between Jordan and 15 EU members. The comprehensive agreement worked to eliminate virtually all customs duties on trade in industrial, fish and marine, and agricultural products. However, Jordanian businesspeople struggled to establish relationships with European counterparts, largely because of the agreement’s rules of origins clauses, which required that 60% of material inputs be Jordanian.

Considered major landmarks, agreements in 2016 and 2018 simplified the clauses so that only 30% of material in Jordanian products had to be made in Jordan. These agreements were signed in the era of the 2012 Jordan Compact, in which the EU’s concern for Syrian refugees was increasingly reflected in its economic relations with Jordan. Syrian livelihoods were promoted and valued as safeguards against donor fatigue and an overburdened United Nations High Commissioner for Refugees (UNHCR). At various points in time, agreement stipulations included, for example, that 15-25% of export production lines had to include UNHCR-registered Syrians (Al Nawas, 2020). Already facing domestic unemployment challenges, Jordanian authorities in turn expected refugee aid initiatives to have a 7:3 Syrian to Jordanian benefit ratio, a formula widely observed by the donor community (FAO, 2018, p. 2). While EU-Jordan trade saw boosts after the 2012 Jordan Compact and the 2016 and 2018 Rules of Origin Agreements, growth did not last beyond a year in each case (EU Directorate-General for Trade, 2020, p. 9).

The inability of the agreements to sustain growth indicates that there are more structural obstacles to trade between Jordan and the EU. While 18.2% of Jordan's imports come from the EU – making it Jordan's top exporter – the EU only imports 3% of Jordan's products, making it the seventh importer of Jordanian products. In total volume, the EU is Jordan's second biggest trading partner after Saudi Arabia – mainly Germany, Italy and France. On the other hand, Jordan is the EU's 65th – and its 15th in the West Asia North Africa region. In 2020, the EU exported some €3 billion worth of goods to Jordan, more than eight-fold the €360 million it imported from Jordan (EC Directorate-General for Trade, 2020, pp. 7-9). This trade balance must be read in spite of Jordan's smaller population and lower purchasing power relative to the EU (Vergbert, 2020). Given that Jordan's average import-export ratio stands around 6:4, it is also unusually negative relative to other partnerships (WITS, 2018).

The inability of the agreements to sustain growth indicates that there are more structural obstacles to trade between Jordan and the EU.

The imbalance is mainly attributable to the nature of the export markets. Namely, that Jordan needs high value goods produced by Europe such as machinery and transport equipment – imported at €1.189 billion in 2019 – while Europe does not need Jordan's highest valued goods, namely chemicals and pharmaceuticals. Although making up 43% of its Jordan imports, the EU imported from Jordan only €40 million worth of fertilisers. The EU maintains a protectionist policy that aims to ensure domestic fertiliser production, and has in place a 6.5% tariff on imports of phosphorus and potassium, resources in which Jordan holds a significant global share. Still, of the 23% of potash that the EU does import, only 3% comes from Jordan. By way of regional comparison, 9% comes from Israel (EU Science Hub, 2021, p. 321).

Trade imbalance is mainly attributable to the nature of the export markets. Jordan needs high value goods produced by Europe while Europe does not need Jordan's highest valued goods.

Pharmaceuticals represent an even greater challenge, whereby the EU imports only 5% of its medicinal needs (Eurostat, 2020). As such, it imported only €3 million from Jordan, while exporting to it €314 million. The stiff competition for the EU's pharmaceuticals market means that Jordan will have to markedly develop its industry. It was perhaps towards this end that Jordan's Economic Growth Plan for 2018-2022 (JEGP) states, "Jordan must invest in preparing its manufacturing sector for compliance with EU quality requirements, identifying and establishing private sector trade linkages and partnerships, credit facilities, and feasible transport solutions" (EPC, 2018, p. 14). This could be a boon for Jordan's pharmaceutical profile, which already enjoys regional clout.

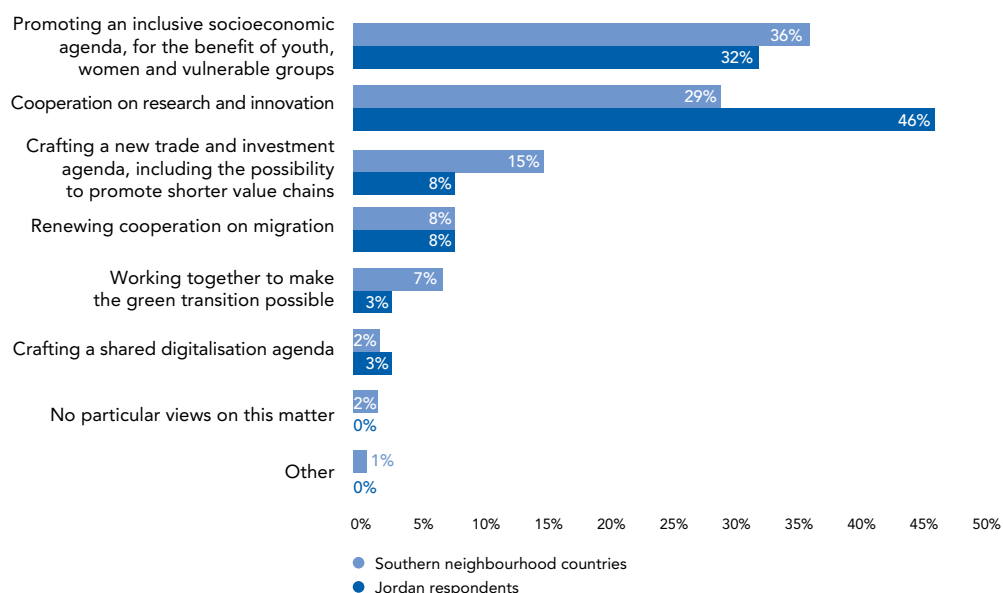
Otherwise, textiles and clothing make up Jordan's next biggest share of exports to the EU, at 16.3%. However, these are manufactured in industrial parks – operating beyond regular tax regimes – that are over two-thirds staffed by foreign workers (METJ, 2020). As such, the €52 million they generate from the EU's imports do not permeate the Jordanian economy as effectively as the pharmaceutical industry, dominated by private enterprise and relying on Jordanian skills.

## Observations from the Jordanian Street

Jordanians are aware that the move away from raw resources towards specialised products and services requires Jordan to have a competitive edge.

Jordanians tend to reiterate that economics is the most important area of EU-Jordanian cooperation, as per the January 2021 EuroMeSCo Euromed Survey. Moreover, responses indicate awareness among Jordanians that the move away from raw resources towards specialised products and services requires Jordan to have a competitive edge. Towards this end, Jordanians have a rather specific focus on the main opportunities the EU and its southern partners should jointly seize. While southern neighbourhood countries as a whole said that promoting an inclusive socioeconomic agenda was the most important opportunity (36%), 46% of Jordanians said that cooperation on research and innovation was more important (see graph 1).

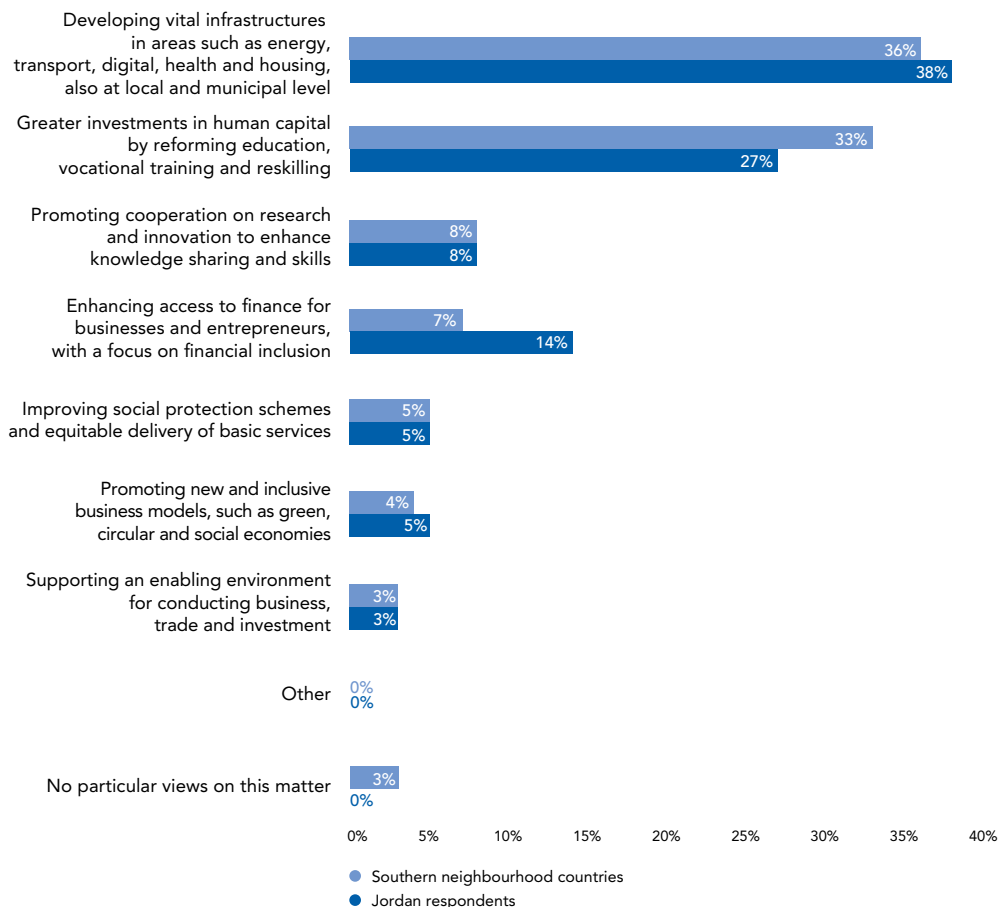
**Graph 1: Q.2 What are the main opportunities that the European Union and its southern partners should jointly seize? (Ranked as first option)**



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

This might be read in light of a qualified workforce without the resources to develop research and innovation capacities (UNDP, 2020). In terms of resources, it seems that Jordan especially lacks physical infrastructure. This perception was reinforced by the Jordanian response that the most effective way to foster more inclusive economies in the region was through developing vital infrastructure (see graph 2).

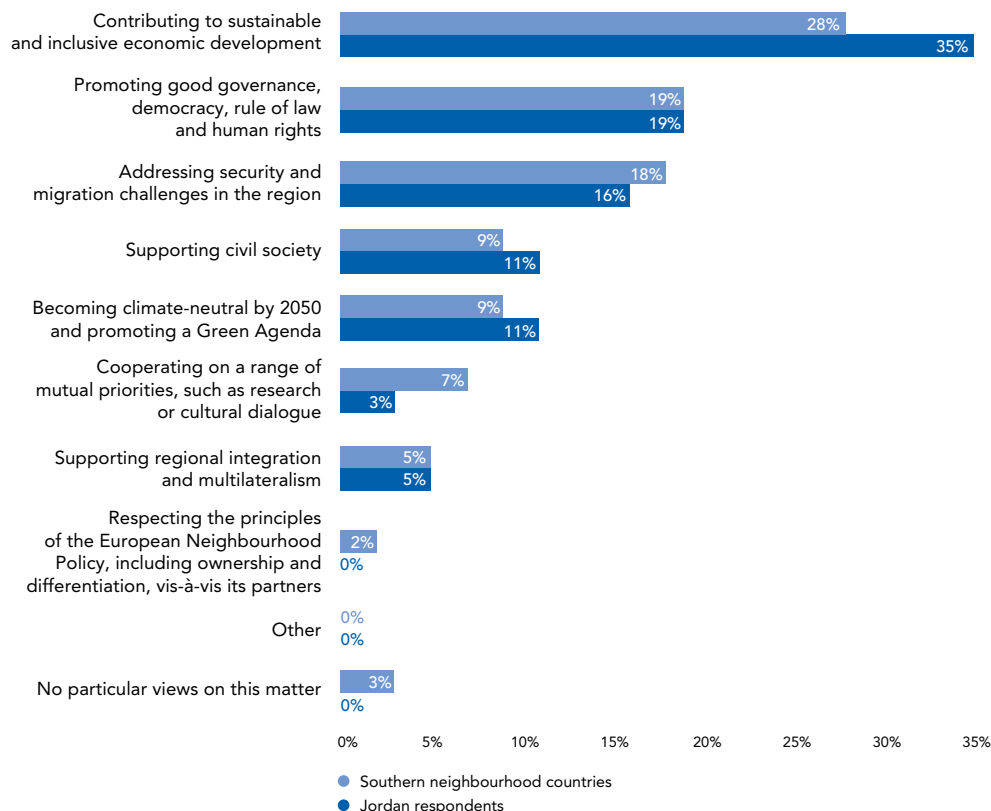
**Graph 2: Q.12 Most effective ways to foster more inclusive economies in the southern neighbourhood countries (Ranked as first option)**



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

In line with regional trends, Jordanians saw the EU as providing added value in prioritising a sustainable and inclusive economic development agenda relative to other global players. Compared to other regional respondents, Jordanians also had a nuanced appreciation of the EU's added value in supporting civil society and promoting a green agenda, two themes that feature prominently in EU-sponsored projects in Jordan (see graph 3).

**Graph 3: Q.5 What is the European Union's added value compared to other global players that are increasingly active in the region? (Ranked as first option)**



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

## Particular Issue of Importance

Water scarcity and reliance on energy imports will constrain its manufacturing; thus authorities look increasingly towards specialised services.

Jordan must develop sectoral growth according to resource strengths and limitations, both natural and human. While Jordan is not lacking in labour – the Jordan Economic Growth Plan (JEGP) acknowledges – water scarcity and reliance on energy imports will constrain its manufacturing. Rather than goods, Jordanian authorities and respondents thus look increasingly towards services, although not its traditional activities. Neither government nor finance services – Jordan's top two gross national product (GDP) contributors – can continue to be the engines of growth (EPC, 2018, p. 7). The COVID-19 crisis has shown that Jordan cannot rely on the hospitality and tourism sector to dominate either.

Rather, Jordan must look to more specialised services, in harmony with both global trends and Jordanian skills. Jordanians are thus keen to develop their Information and Communications Technology (ICT) sector. Accounting for 12% of GDP in 2018

– a treble growth since 2014 – Jordanians have seen the success that ICT enterprises can have (JIC, 2018, p. 2). Jordanian web-based companies such as Mawdoo3 – dubbed the “Arabic Wikipedia” – Arabia Weather, and Jamalon Bookstore, have become the largest regional providers in their respective services.

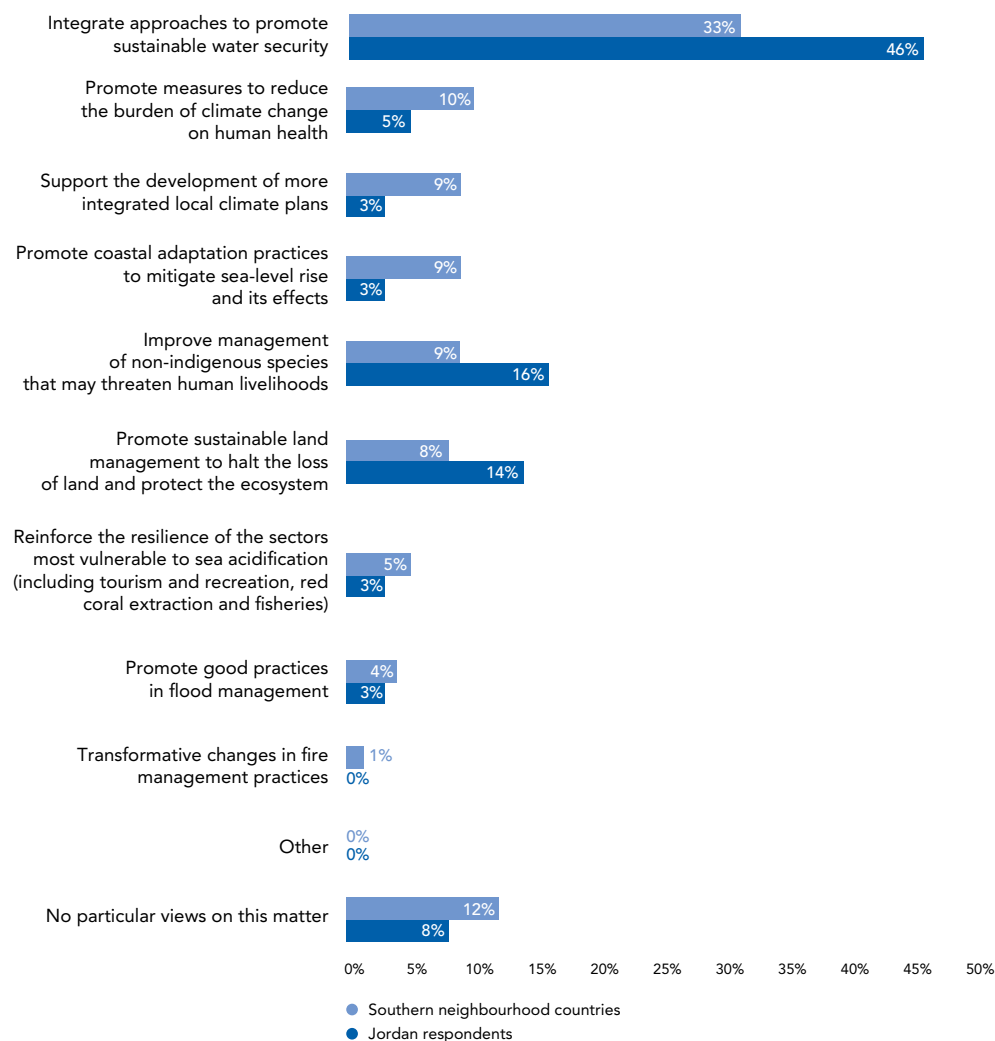
As such, developing ICT is a top government priority. According to the JEGP, Jordan “aims to capitalise on its competitive advantages of having high quality human capital, favourable project economies, competitive wages and its convenient time-zone” by becoming a digital outsourcing hub in the region and internationally. However, it emphasises that key infrastructure is lacking in order to implement digitalisation policies. Jordan requires advanced digital infrastructure, including fibre-optic networks (EPC, 2018, p. 39). In 2019, Jordan saw two of its biggest telecom companies roll out these cables to deliver 5G internet access to homes and businesses across the kingdom.

Beyond infrastructure, respondents indicated the need to develop ICT skills. Globally ranked third in having the most diversified pool of skills amongst its tertiary graduates, Jordan’s ICT sector appears to have a solid foundation upon which to develop (WEF, 2020, p. 39). However, Jordanians do not take this for granted, with responses indicating an acute awareness that the ICT sector requires constant training and cutting-edge skills. More than half of all respondents said that adapting education and vocational training to the requirements of digitalisation was the most effective way to support a digitalisation agenda (see graph 4).

ICT is now a top priority in Jordan but key infrastructure is lacking in order to implement digitalisation policies.

Together with infrastructure, adapting education and vocational training to the requirements of digitalisation is also a key element.

**Graph 4: Q.19 Priority measures to face climate and environmental change in the Mediterranean (Ranked as first option)**



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

Considering labour readiness as a first step to establishing a thriving ICT sector, Jordan would stand to benefit from a comprehensive survey of its current skill sets in this sector, with recommendations on which skills need to be developed. In order to gain momentum, the sector would need to attract foreign investment. Jordanians are quite aware of this; when asked about what should be done to stimulate trade relations between the EU and its southern partners, most respondents said the EU and its partners should enhance market access by including services and investment in agreements. The EU could thus encourage Jordanian ICT growth by expanding the role of services in upcoming trade agreements and making it a priority on its donor agenda.

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# Egypt and the EU: Ten Years After the Arab Uprising

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Egypt has been an active partner of the European Union (EU) in the Southern Mediterranean for decades. Relations between Egypt and the EU have gained further importance in the past few years. The deep instability that engulfed many countries around the region, and the complex crisis of the entire regional order, have all granted greater importance to relations between Egypt and the EU.

## Greater Regional Risks

Following the uprisings of 2011, political turmoil devastated the fragile regional order in the Southern Mediterranean. The situation in the region was further exacerbated by the lack of constructive initiatives on the side of major global actors, particularly the United States (US). The US has been the main global actor in the Mediterranean and Middle Eastern scenes in most of the post-WWII era. In recent years, however, the US has developed disinterest in the region. Having fought costly wars of choice in Afghanistan and Iraq, without conclusive outcomes, the American public and elites lost interest in the region in particular, and developed isolationist attitudes vis-à-vis international politics in general. Scaling down American involvement in our region is among the few agreements in the divided American society. Security of energy supplies and the state of Israel provided the *raison d'être* of US presence in our region but apparently this is no longer the case. The US is no longer concerned about the security of energy supplies as it has been in most of the post-WWII era. Israel has grown up and is no longer dependent on US security guarantees. As it stands, the US can afford to pull back from the Middle East and the Mediterranean without serious risks.

Following the uprisings of 2011, that affected the fragile regional order in the Southern Mediterranean, the situation in the region was further exacerbated by the lack of constructive initiatives on the side of major global actors.

## Greater Demand for EU Role

Mounting risks of terrorism and human trafficking and the recent discoveries of natural gas in the Eastern Mediterranean are spilling over into the broader region, to further accentuate the Mediterranean as a security complex.

After all, the US is not a Mediterranean country, and it is shielded against regional hazards by the reality of geographic distance. In contrast, geography strongly links Europe to the Mediterranean. The past decade has accentuated the fact that the Mediterranean is a transit area rather than a barrier. The mounting risks of terrorism and human trafficking across the Mediterranean prove beyond doubt that the Mediterranean is rapidly developing into a security complex, where developments in one country impact other countries.

The recent discoveries of natural gas in the Eastern Mediterranean lead in the same direction. Offshore natural gas from the Eastern Mediterranean created common interests between a number of Mediterranean and European countries. Also, the newly discovered valuable natural wealth under the Mediterranean deep water further aggravated the old disputes about territorial and economic waters. Both the blessings and the curses of the discovered wealth are spilling over to the broader region to further accentuate the Mediterranean as a security complex.

The scaling down of the US presence in the region encouraged regional and supra-regional actors to pursue assertive policy. The strategic competition between different actors generated further risks. The situation in the region calls upon the EU to assume its responsibilities towards the stabilisation of the region.

## Egypt in the Eye of the Mediterranean Storm

Egypt has to deal with the emerging threats in the Mediterranean, while continuing to address the much older concerns of underdevelopment and poverty.

Egypt is located in a central position, where many of the serious Mediterranean security risks intersect. Egypt experienced the Arab uprising, had its share of political turmoil, and suffered the economic losses caused by political instability. Terrorism is a main security threat, which Egypt has to face. Across Egypt's western borders, the political crisis in Libya raises serious security concerns. The fragile state institutions in Libya allowed terrorist groups a safe haven in the troubled country. Egypt is blessed by the natural gas resources recently discovered in its economic zone under Mediterranean waters. However, the discovered resources induced regional tension and risks, rather than cooperation and harmony.

Egypt has to deal with the emerging threats in the Mediterranean, while continuing to address the much older concerns of underdevelopment and poverty. Egyptian security and development concerns are of a hard-core nature, which sets Egypt's national priorities in rather a traditional fashion, where military preparedness and the mobilisation of economic resources make all the difference. Within these circumstances, the government in Egypt carries much greater responsibilities and enjoys greater powers than those assumed by governments in the more conventional liberal model.

## Achievement Yes, But Still Early to Celebrate

The Arab uprising did not generate success stories. It generated a few survivors and a larger number of failing states. Egypt has been lucky to make it to the short-list of survivors. It continues to face the threat of terrorism, even though it successfully contained it in a narrow pocket in Northern Sinai (Mcmanus, 2020). The forces of instability and economic distress could have turned Egypt into a major source of irregular migration. However, Egypt has been able to control trafficking through the deployment of measures of both security and development (IOM, 2020). Tourism has suffered the calamities of terror and instability but the economy achieved satisfactory levels of growth. In 2019, prior to the outbreak of COVID-19, Egypt's economy grew at a rate of 5.6% (World Bank, 2020a). The pandemic is obstructing growth everywhere. However, with a growth rate of 3.55%, Egypt is among the few countries that managed to achieve a positive growth rate during the dark year of 2020. A recent report by the International Monetary Fund (IMF) expects the Egyptian economy to expand by only 2.76% in 2021, before returning back to an average growth rate of 5.28% over the four-year period 2022-2025 (IMF, 2020). In a recent report, the World Bank recommended allowing the private sector greater space and opportunities (World Bank, 2020b). The report highly valued the macro-economic reforms introduced in Egypt during the past five years. The report suggested that realisation of the potentials made possible by such reforms requires structural changes towards the creation of functioning markets.

But achievements do not come without cost. Egypt's achievements have been made possible through massive centralisation and mobilisation of resources, and the limiting of political pluralism. While appreciating the progress achieved, aspirations for openness and expansion of the public sphere are shared by many in Egypt. Political openness that would not jeopardise stability and the steady economic growth is the delicate balance which Egypt's main stream is looking for.

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## Convergence and Divergence

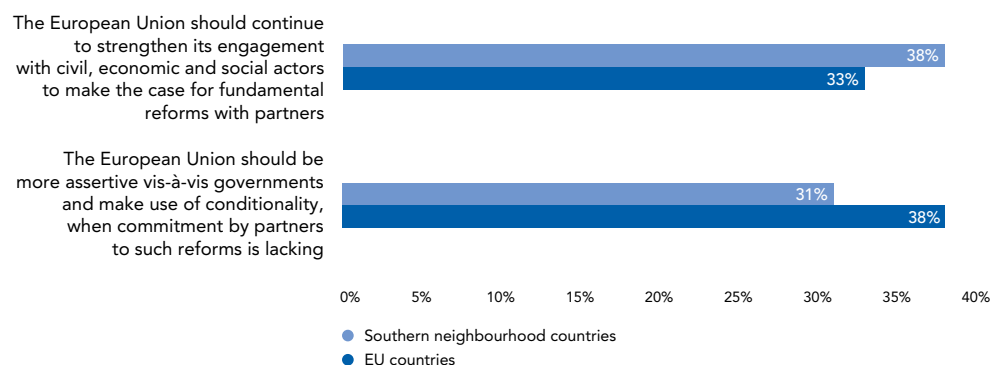
The varying views regarding developments in the Mediterranean are captured by the Euromed EuroMeSCo Survey. The Survey reveals patterns of convergence and divergence between the different sub-groups. Capturing divergences is important to develop a nuanced picture of interests and values of different groups. This is particularly important towards the development of policies tailored to serve the needs of different partners. Identifying convergences, on the other hand, is important to capitalise on common interests and preferences so that integration across the Mediterranean is better served.

Responses of different groups to the questionnaire reveal important trends. There is a high level of convergence between the views expressed by respondents from the southern neighbourhood and the views of respondents from the EU. The Survey contains 23 questions, asking about 29 items. Comparison between the views of the southern neighbourhood respondents and EU respondents was possible on 19

items, among which the views of southern respondents converged with the views of non-southern respondents 16 times. The close to identical views expressed by respondents from the two sides of the Mediterranean reflect a great deal of common understanding and the emergence of a Euro-Mediterranean public space, where views about security, growth and culture are widely shared.

The three cases of divergence between EU and southern neighbourhood respondents are significant in illustrating different approaches of the two groups. First there is question 10 (see graph 1), asking about ways to support reforms in good governance, democracy, the rule of law and human rights. While the majority of EU respondents selected conditionality and assertiveness vis-à-vis southern governments, southern neighbourhood respondents selected stronger engagement with civil, social and economic actors. The underlying difference is between respondents from the Southern Mediterranean who prefer persuasion and incentives over assertiveness, which is supported by non-southern respondents.

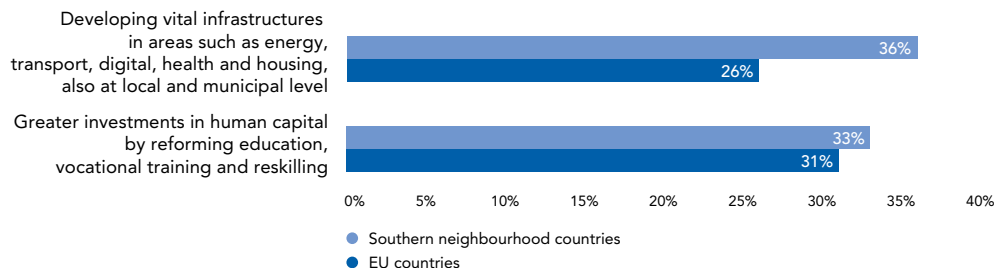
**Graph 1: Q.10** When it comes to supporting reforms in the fields of good governance, democracy, the rule of law and human rights (Ranked as first option)



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

Then there is question 12 (see graph 2), asking about ways to foster inclusive economies in the south. While EU respondents selected investment in human capital, southern neighbourhood respondents opted for developing vital infrastructures in energy, transport, digital, health and housing. EU respondents tend to adhere to a liberal notion of empowerment, where educated and skilful poor can self-help limit their economic marginalisation. Southern neighbourhood respondents, on the other hand, adhere to a more traditional approach, where public spending and investment in public works is the answer to the question of economic inclusion.

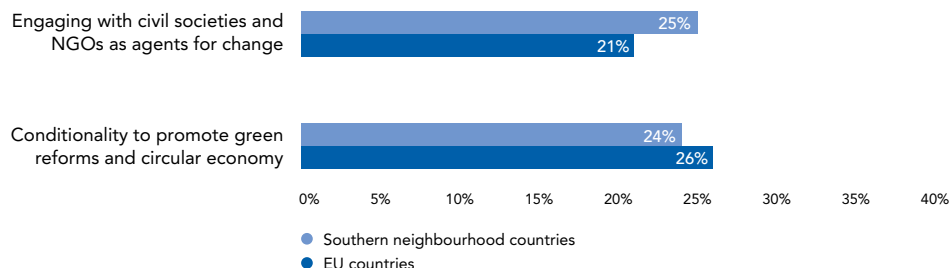
**Graph 2: Q.12 Most effective ways to foster more inclusive economies in the southern neighbourhood countries (Ranked as first option)**



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

Finally, there is question 17 (graph 3), asking about effective ways to support green and sustainable transition in the south. While EU respondents selected conditionality to promote green reforms and circular economy, southern neighbourhood respondents selected engaging with civil society. Divergence between the two groups corresponds to the observed traditional trends, where non-southerners tend to opt for conditionality, while southerners tend to resist conditionality as a type of unwelcome pressure and interference.

**Graph 3: Q.17 Effective ways to support the green and sustainable transition in the southern neighbourhood countries (Ranked as first option)**



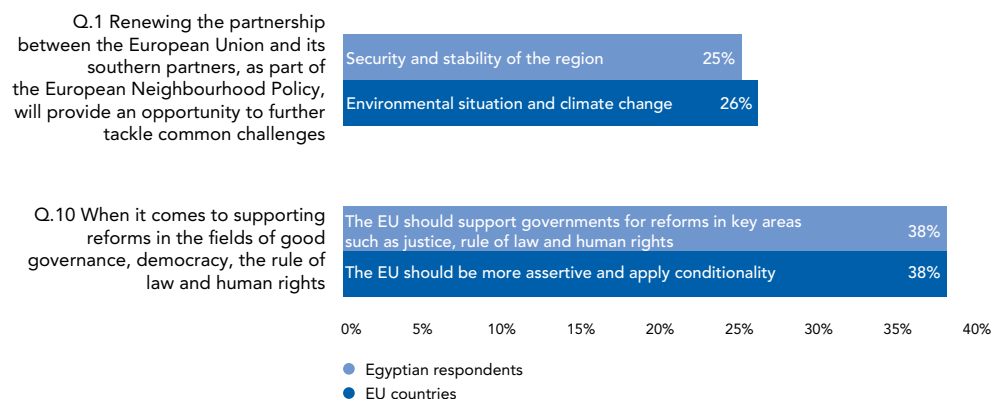
Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

Respondents from Egypt, however, reveal a greater level of divergence. On the compared 19 items, the first choice selected by Egyptian respondents was different from the choice of the EU respondents six times. While non-southern respondents tended to put more emphasis on civil society, human capital, the private sector and reform, respondents from Egypt tended to put more emphasis on government, infrastructure, security and financial assistance.

The views of Egyptian respondents reflect Egypt's recent political experience, where the years of political turmoil and terror accentuated the importance of stability, security, and order.

Views of Egyptian respondents reflect Egypt's recent political experience, where the years of political turmoil and terror accentuated the importance of stability, security and order (see graph 4).

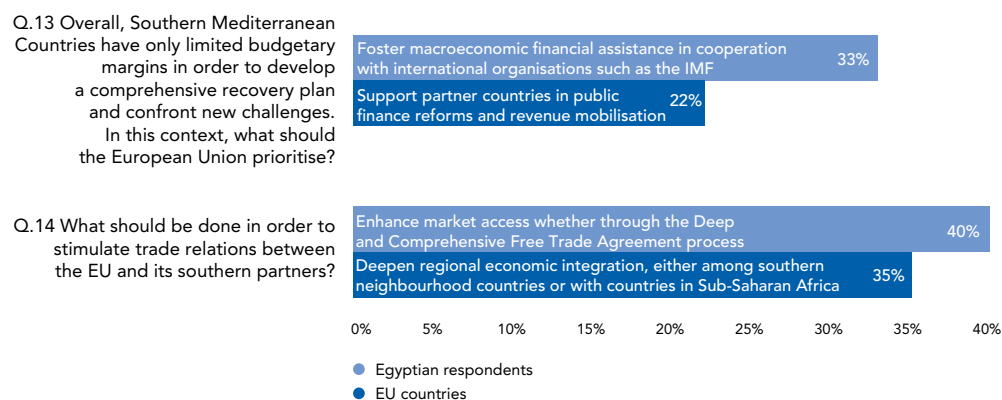
**Graph 4: Divergent views of EU and Egyptian respondents (top options in %)**



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

Views of Egyptian respondents also reflect Egypt's struggle with chronic poverty and sluggish development, which creates a strong pressure for centralised mobilisation of resources towards rapid growth (see graph 5).

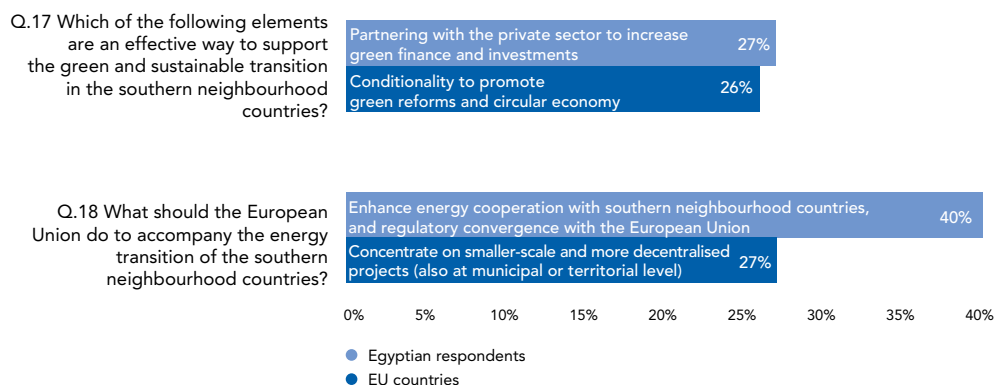
**Graph 5: Divergent views on sustainable and inclusive economies EU and Egyptian respondents (top options in %)**



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

However, the divergence on question 17 is really interesting (see graph 6). Question 17 asks about the means to support green and sustainable transition in the south. While EU respondents selected working with the private sector, Egyptian respondents selected conditionality. This is the only case where Egyptian respondents supported conditionality, which can be interpreted as an indication of how important the environment is for middle-class educated Egyptians. It could also be argued that it is unlikely that a government so preoccupied with economic growth will pay enough attention to the environment unless lobbied by external partners.

**Graph 6:** Divergent views on green agenda EU and Egyptian respondents (top options in %)



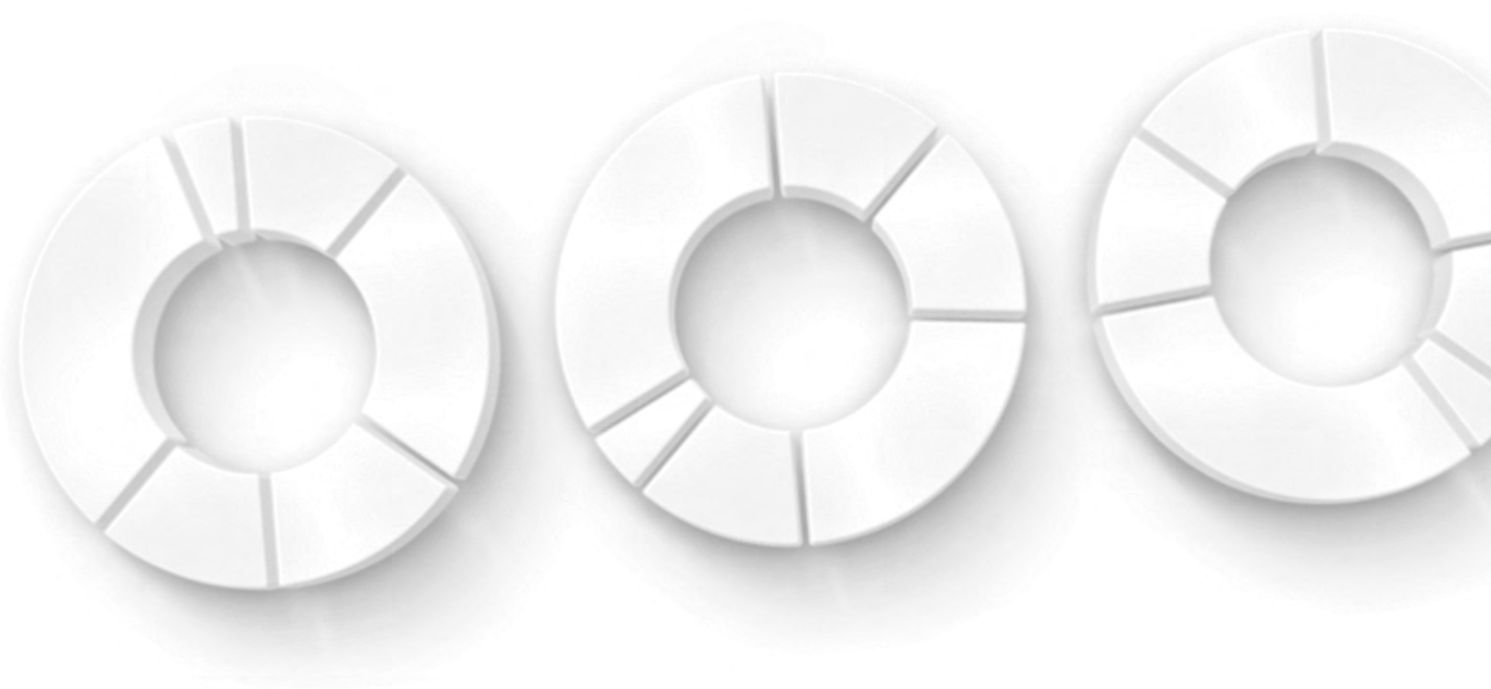
Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

However, the Survey reveals that, notwithstanding divergences, certain policy directions receive the agreement of different groups. These include:

- Promoting an inclusive socioeconomic agenda and sustainable and inclusive development. The political turmoil of the recent past has been instrumental in making the case for inclusive and sustainable development to face the risks of exclusion and marginalisation.
- Corruption, insufficient governance and institutional capacity are obstacles to growth and regional integration. Views around the Mediterranean might be different regarding democracy and rights. However, the agreement on governance and institutionalisation helps to bridge the gap between the two shores.
- Importance of establishing networks and platforms to link civil society actors. Although differences exist regarding the political role of civil society, there is a greater agreement vis-à-vis its developmental role.

- Building economic opportunity and addressing root causes of irregular migration. This is an area where the EU and the southern countries are in a clear win-win situation.
- Adapting education and training to requirements of digitalisation. There is a shared agreement that digitisation is the wave of the immediate future. It is an area in which the Southern Mediterranean turns north in search of knowledge and expertise.
- The importance of promoting green reforms and circular economy. Even though the Southern Mediterranean is occupied with economic growth, there is sufficient understanding of the importance of green economy and recycling. The EU has established itself successfully as the global champion of the protection of the environment. Southern partners appreciate this reality, and are ready to make use of it.
- Promote sustainable water security. Water scarcity is a concern for many nations in the southern neighbourhood, and the EU is invited to play a constructive and effective role addressing this vital issue.
- EU members should unify positions and speak with one voice. Such a wish can hardly be met. However, agreement on this issue reflects the losses and missed opportunities caused by divisions among EU members.







# ANNEXES

I METHODOLOGY

II LIST OF RESPONDENTS

III SAMPLE OF THE SURVEY

IV QUESTIONNAIRE

SET OF RESULTS

(only available online at [www.iemed.org](http://www.iemed.org))



# I METHODOLOGY

## METHODOLOGY

### The Questionnaire

The questionnaire was organised into five thematic blocks including 23 questions on main aspects that were expected to feature in a renewed partnership with the southern neighbourhood which cover various issues of strategic importance. First block had a number of introductory questions related to new opportunities for Euro-Mediterranean cooperation, its impact and regional dimension. After that, there was a block of questions related to human development, governance and migration. The third set included questions on inclusive, resilient and sustainable economies. The fourth set of questions was about the environment, energy and climate change resilience, and the fifth one was about peace and security cooperation.

The questionnaire combined open-ended questions and multiple-choice questions with predefined answers offering respondents the possibility to choose and rank among several options or the possibility to grade on a “very low” to “very high” scale. For those questions, an optional space was provided to elaborate on the answer. This open part was considered of great importance for a Survey of this kind as it contributes to improving the interpretation of its overall results and provides with additional valuable material.

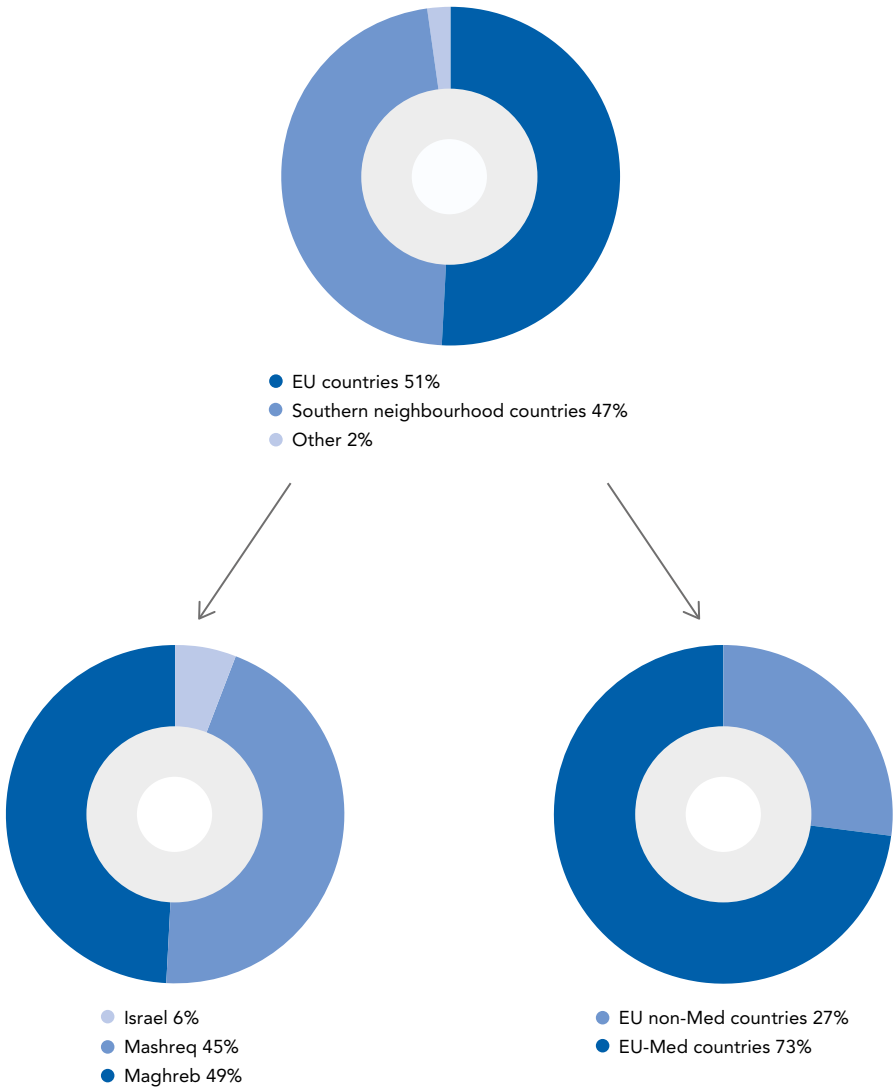
### Survey Sample

To conduct the Survey, a universe of 6,100 experts, actors and policy-makers from the EU and southern neighbourhood countries was selected. They received an invitation to participate. As in previous years, geographical distribution, institutional affiliation, field of knowledge and gender balance were the reference criteria for selecting the universe.

For this survey a second participation modality was introduced: a public campaign on the consultation inviting to participate through an open link. This modality aimed to reflect the specific nature of this edition and the need to be as inclusive as possible. 44% of the total 789 respondents accessed the survey through this open link modality.

Concerning the distribution by geographical origin, 51% came from the European Union and 47% from southern neighbourhood countries.

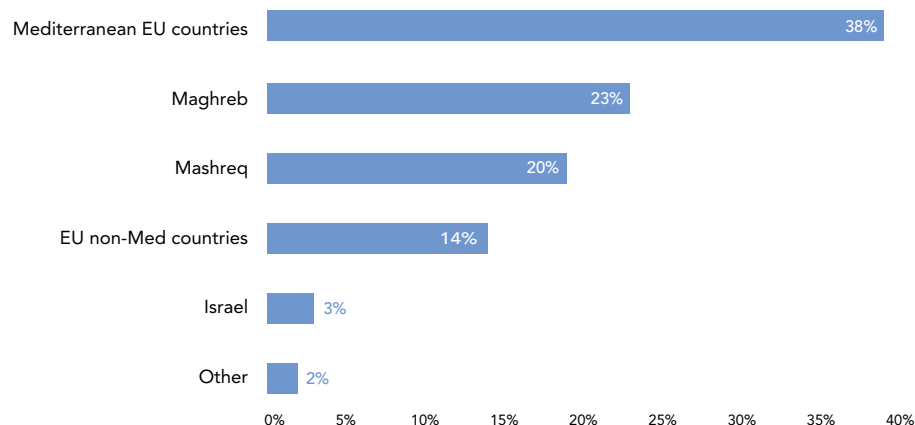
Breakdown of respondents by geographical origin



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

The Mediterranean EU countries<sup>1</sup> (38%) and the Maghreb countries<sup>2</sup> were the sub-regional groupings with an important number of responses. The remaining Mashreq<sup>3</sup> countries and EU countries came in third and fourth position.

#### Breakdown of respondents by region



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

Reaching a representative distribution by country continued to be a difficult task. Some countries were over-represented and others under-represented. In order to avoid bias in the results, we weighted them according to distribution of the target by the countries in the sample. With this weighting we avoid the over-representation of Spain, France, Italy Morocco and Tunisia largely determining the results of respondents overall.

1. Spain, France, Italy, Portugal, Malta, Cyprus, Greece, Croatia and Slovenia. The first three alone account for nearly 85% of responses from this region.

2. Maghreb countries include Morocco, Algeria, Tunisia and Libya.

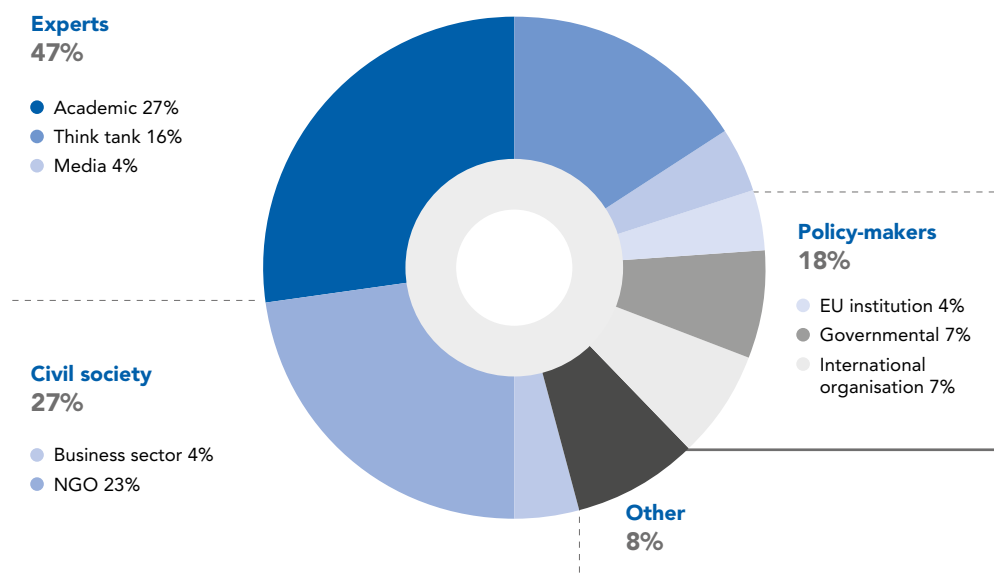
3. Mashreq countries include Egypt, Jordan, Lebanon, Palestine and Syria.

## Profile of respondents

In the first block of questions, in addition to providing their country of origin, respondents were asked to indicate their gender and the type of institution they belonged to<sup>4</sup>.

As shown in the graph below, the majority of respondents to the questionnaire are “experts”, an aggregated category that includes respondents from think tanks, media and, above all, academia. Altogether, these groups account for 47% of the total number of responses. The other categories are “civil society” (encompassing companies and NGOs) account for 27% and “policy-makers” (embracing responses from European or international institutions and governments), 18% of the total number of responses.

Breakdown of respondents by type of institution

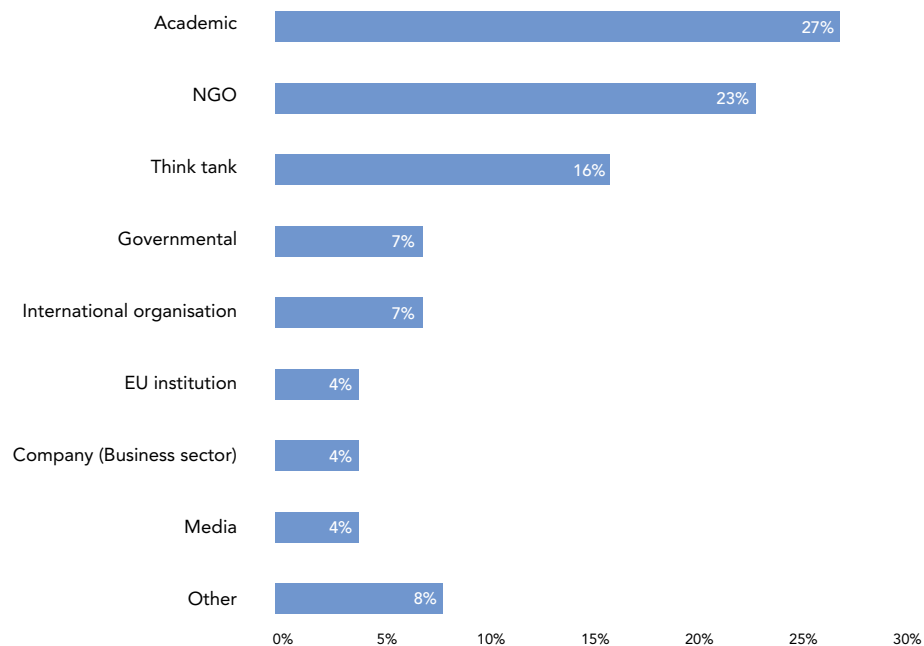


Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

4. Governmental, EU institution, international organisation, think tank, academic, media, NGO, company (business sector).

When looking specifically at the individual groups, academia emerges as the most represented institution (27% of total responses), followed by NGOs (23%) and think tanks (16%). Altogether, these groups account for two thirds of the total responses.

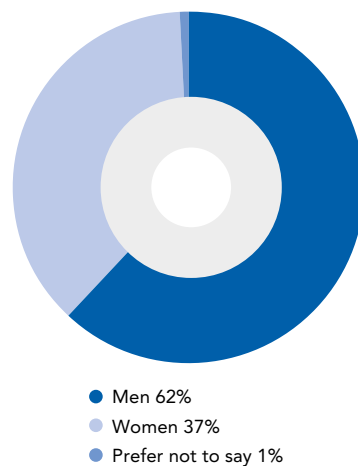
#### Breakdown of respondents by type of institution



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

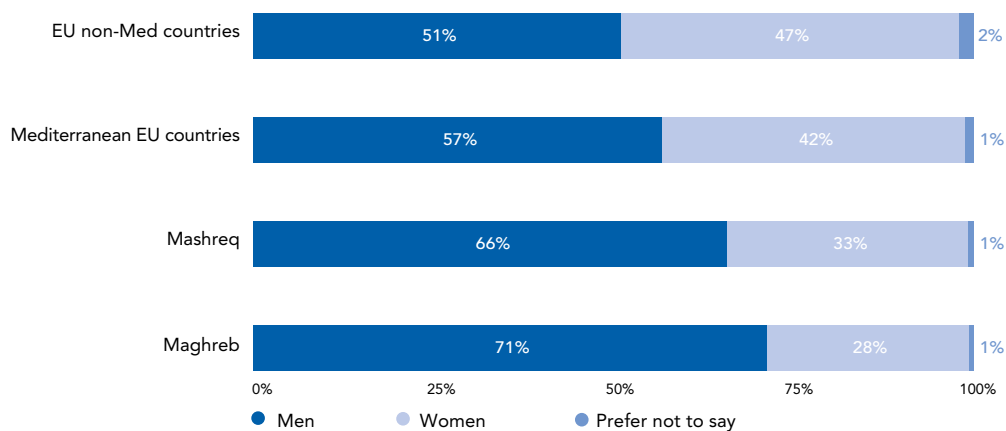
Finally, to complete the description of the sample on which this Survey is based, it is important to note that 37% of respondents were women. When analysing the North/South dimension, the aggregate proportion of women amounts to 30% for southern neighbourhood countries, while it increases to 44% for EU countries. By regional groups, the Maghreb fall below the overall gender ratio.

#### Breakdown of respondents by gender

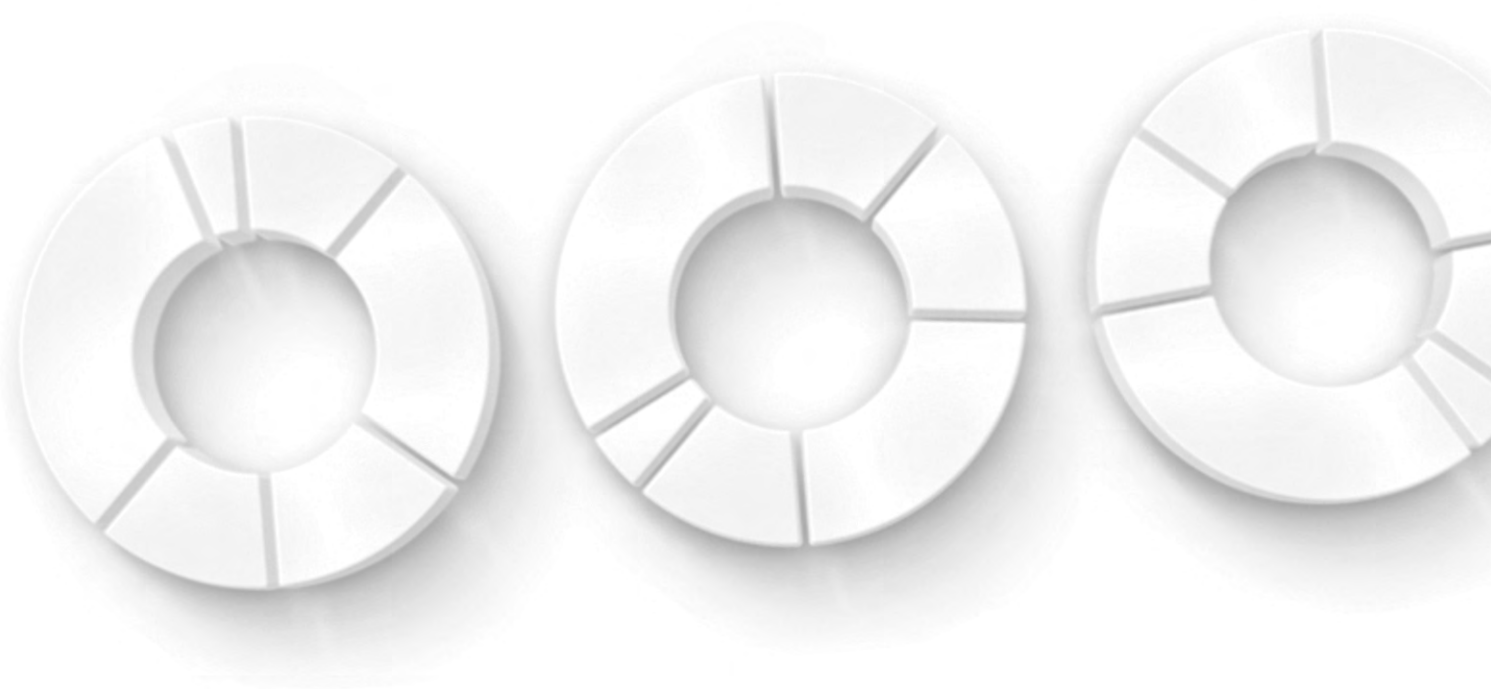


Source: Compiled by the IEMed based on the results of the EuroMeSCo Euromed Survey

#### Breakdown of respondents by gender and regional groups



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



## **II LIST OF RESPONDENTS**

## LIST OF RESPONDENTS

Respondents could participate to the survey appearing as an institution or as an individual. 258 answered as institution and 531 answered as individuals. Respondents had the option of not appearing on the final list of participants. 99 out of the 789 that answered chose not to be included; therefore, this list has a total of 258 names of institutions and 430 individual names.

### List of organisations that have answered the survey

#### Academic

**ASOCIACIÓN GRUPO DE ESTUDIOS EUROPEOS Y MEDITERRÁNEOS (AGREEM).** Spain

**AN-NAJAH NATIONAL UNIVERSITY.** Palestine

**AZM UNIVERSITY.** Lebanon

**BETA TECH. CENTER** – University of Vic / Central University of Catalonia. Spain

**BREDA UNIVERSITY OF APPLIED SCIENCES.** The Netherlands

**CENTRE OF INTERNATIONAL RELATIONS,** Faculty of Social Sciences, University of Ljubljana. Slovenia

**CENTRE POPULATION ET DÉVELOPPEMENT – IRD.** France

**CERI SCIENCES PO PARIS.** France

**CONSIGLIO NAZIONALE DELLE RICERCHE (CNR).** Italy

**CORVINUS UNIVERSITY OF BUDAPEST.** Hungary

**DEUTSCHES INSTITUT FÜR ENTWICKLUNGSPOLITIK / GERMAN DEVELOPMENT INSTITUTE (DIE).** Germany

**ÉCOLE NORMALE SUPÉRIEURE.** France

**EURO-MEDITERRANEAN UNIVERSITY.** Slovenia

**FACULTY OF MANAGEMENT UNIVERSITY OF WARSAW.** Poland

**GIGA INSTITUTE FOR MIDDLE EAST STUDIES.** Germany

**HAIGAZIAN UNIVERSITY.** Lebanon

**HASHEMITE UNIVERSITY** – International Relations and Strategic Studies Program. Jordan

**HASSIBA BENBOUALI UNIVERSITY.** Faculty Law and Political Science. Algeria

**INSTITUTE FOR DEVELOPMENT AND INTERNATIONAL RELATIONS.** Croatia

**INSTITUTE FOR EUROPEAN STUDIES, UNIVERSITY OF MALTA.** Malta

**INSTITUTE FOR GROWTH AND FLUCTUATIONS,** University of Hamburg. Germany

**INSTITUTE OF MEDITERRANEAN AND ORIENTAL CULTURES.** Polish Academy of Sciences. Poland

**INSTITUTE OF THE ENVIRONMENT** – University of Balamand. Lebanon

**INSTITUTE FOR STUDIES ON MEDITERRANEAN.** National Research Council of Italy (ISMed-CNR). Italy

**INTERDISCIPLINARY RESEARCH GROUP ON IMMIGRATION (GRITIM)** – Universitat Pompeu Fabra (UPF). Spain

**JEAN MONNET EURO-MED CENTRE,** University of Catania. Italy

**LASEI - UAM,** Madrid (Escuela de Inteligencia Económica y Relaciones Internacionales de la UAM). Spain

**LUXEMBOURG INSTITUTE FOR EUROPEAN AND INTERNATIONAL STUDIES.** Luxembourg

**NATIONAL AUTHORITY FOR REMOTE SENSING AND SPACE SCIENCES (NARSS).** Egypt

**POLYTECHNIC INSTITUTE OF LISBON.** Portugal

**REFUGEE, DISPLACED PERSONS AND FORCED MIGRATION STUDIES CENTER.** Jordan

**SABANCI UNIVERSITY.** Turkey

**SOUTH EAST EUROPEAN RESEARCH CENTRE.** Greece

**SOUTH MEDITERRANEAN UNIVERSITY.** Tunisia

**TAMPERE PEACE RESEARCH INSTITUTE.** Finland

**UNIVERSITÉ CATHOLIQUE DE LOUVAIN.** Belgium

**UNIDAD DE INVESTIGACIÓN SOBRE SEGURIDAD Y COOPERACIÓN (UNISCI).** Spain

**UNIVERSITÀ DEGLI STUDI DI MODENA E REGGIO EMILIA.** Italy

**UNIVERSITÀ INTERNAZIONALE DELL'ARTE.** Italy

**UNIVERSITÉ LIBRE DE BRUXELLES.** Belgium

**UNIVERSITÉ MOULAY ISMAIL.** Morocco

**UNIVERSITY OF ROMA LA SAPIENZA.** Italy

**YARMOUK UNIVERSITY.** Jordan

## Civil society organisation

**A GROUP FOR YOU.** Libya

**ACADEMIA ARABESCAS VÄNFÖRENING.** Sweden

**ACTIONS IN THE MEDITERRANEAN (AIM).** Belgium

**ASSOCIATION POUR LE DÉVELOPPEMENT DES INITIATIVES CITOYENNES ET EUROPÉENNES (ADICE).** France

**ASSOCIATION OF ORGANISATIONS OF MEDITERRANEAN BUSINESSWOMEN (AFAEMME).** Spain

**AGDZ VOLUNTEERS WITHOUT BORDERS.** Morocco

**AGENCE DE DÉVELOPPEMENT LOCAL-BÉNI-ABBÈS.** Algeria

**AL-HAYAT CENTER.** Jordan

**AMEC – Asociación Multisectorial de Empresas.** Spain

**ARAB NGO NETWORK FOR DEVELOPMENT.** Lebanon

**ARAB WORLD DEMOCRACY AND ELECTORAL MONITOR AL MARSAD.** Palestine

**ASSOCIATION "NOUR" IMC/IMOC.** Algeria

**ASSOCIATION FORUM MAROCAIN DES FEMMES.** Morocco

**ASSOCIATION AL FIDA POUR LE DÉVELOPPEMENT ET LA SOLIDARITÉ SOCIALE (AFDESS).** Morocco

**ASSOCIATION ALIZDIHAR POUR L'ÉDUCATION, FORMATION ET DÉVELOPPEMENT DURABLE.** Morocco

**ASSOCIATION ANARUZ POUR LA CULTURE, LE DÉVELOPPEMENT ET L'ENVIRONNEMENT À DEMNATE.** Morocco

**ASSOCIATION CITOYEN PROMETTEUR.** Morocco

**ASSOCIATION FÉMININE AICHA OUM EL MOUMININE – AFLOU (AFAOM).** Algeria

**ASSOCIATION FOR CIVIL SOCIETY DEVELOPMENT BONSAI.** Croatia

**ASSOCIATION FOR SUPPORTING OF INFORMAL EDUCATION, CRITICAL THINKING AND PHILOSOPHY IN PRACTICE "PETIT PHILOSOPHY".** Croatia

**ASSOCIATION FUTUR POUR LE DÉVELOPPEMENT BATNA.** Algeria

**ASSOCIATION KARAMA DE LA FAMILLE ARABE (AKFA).** Tunisia

**ASSOCIATION SHAMS.** Tunisia

**ASSOCIATION TUNISIENNE DES MÉDIAS ALTERNATIFS.** Tunisia

**AU GRAIN DE SÉSAME.** Morocco

BALKAN AGENCY FOR SUSTAINABLE DEVELOPMENT. Bulgaria

BAYTNA. Syria

CARE. Egypt

CENTRE DE DÉCOUVERTE MER ET MONTAGNE (CDMM). France

CENTRE FOR ADULT EDUCATION VALIDUS. Croatia

CENTRE FOR EUROPEAN INITIATIVES. Bulgaria

COLLECTIF DES FAMILLES DE DISPARUS EN ALGÉRIE. Algeria

COMMUNITY DEVELOPMENT AND CONTINUING EDUCATION INSTITUTE-CDCE-I. Palestine

COMMUNITY FOUNDATION SLAGALICA. Croatia

COOPERA ONGD. Spain

COORDINATING COMMITTEE FOR INTERNATIONAL VOLUNTARY SERVICE (CCIVS)

CORPORATION FOR COMMUNITY DEVELOPMENT ASSOCIATION. Palestine

CULTURE CLASHU. The Netherlands

DART ALEGHWAN. Jordan

DEVELOPMENTAL ACTIVITY ASSOCIATION. Lebanon

EDUCATION FOR EMPLOYMENT. Egypt

EGYPT FOUNDATION FOR YOUTH AND DEVELOPMENT. Egypt

EGYPTIAN COUNCIL FOR FOREIGN AFFAIRS. Egypt

EL WAFA ONG. Mauritania

ENTREPRENEURSHIP AND SOCIAL ECONOMY GROUP (E.K.O.). Greece

EPD TUNISIE. Tunisia

ESPACE ASSOCIATIF POUR LE DÉVELOPPEMENT PARTICIPATIF. Morocco

EURO-ARAB. Spain

EURODEMOS YOUTH MOBILITY. Italy

EUROMED FEMINIST INITIATIVE. France

EUROMED RIGHTS. Denmark

EUROPEAN UNION – NORTH AFRICA WATERWAYS ENDEAVOUR. Belgium

FAROS TOU KOSMOU. Greece

FÉDÉRATION ALGÉRIENNE DES PERSONNES HANDICAPÉES FAPH. Algeria

FÉDÉRATION DES LIGUES DES DROITS DES FEMMES. Morocco

FONDATION AHMED TLILI POUR LA CULTURE DÉMOCRATIQUE. Tunisia

**FORUM ASSOCIATIF DE MARTIL.** Morocco

**FORUM FEMMES MEDITERRANÉE.** France

**GLOBAL YOUNG LEADERS ORGANIZATION.** Tunisia

**GRENZENLOS - INTERKULTURELLER AUSTAUSCH.** Austria

**GROUPEMENT INTERPROFESSIONNEL DES PRODUITS DE LA PÊCHE.** Tunisia

**I'KOTLER.** Morocco

**IN ACTIO KULTUROS CENTRAS.** Lithuania

**INAASH ASSOCIATION.** Lebanon

**INTER ALIA.** Greece

**ITALIAN NETWORK FOR THE EURO-MEDITERRANEAN DIALOGUE RIDE-APS.** Italy

**ITALIAN RED CROSS.** Italy

**JUSTICE AND PEACE-BUILDING.** Egypt

**KENANA ASSOCIATION FOR SUSTAINABLE DEVELOPMENT AND WOMEN EMPOWERMENT.** Egypt

**LEADERSHIP FOR SUSTAINABLE DEVELOPMENT.** Lebanon

**LIGUE ALGÉRIENNE POUR LA DÉFENSE DES DROITS DE L'HOMME (LADDH).** Algeria

**LOCAL DEMOCRACY AGENCY SISAK.** Croatia

**LOTA'S BOX.** Croatia

**MAABER.** Syria

**MADRASATI INITIATIVE.** Jordan

**MAHARAT FOUNDATION.** Lebanon

**MAJALAT**

**MAKHZOUMI FOUNDATION.** Lebanon

**MANUFACTURER ASSOCIATION OF ISRAEL.** Hungary

**MEDITERRANEAN ECO-OPERATION PROGRAM (MEP).** Spain

**NATIONAL CENTER FOR STUDENTS EDUCATIONAL SUPPORT AND DEVELOPMENT.** Libya

**NOVACT.** Spain

**ORGANISATION TUNISIENNE POUR L'ÉDUCATION ET LA FAMILLE.** Tunisia

**OBSERVATOIRE RÉGIONAL DES MIGRATIONS ESPACES & SOCIÉTÉS (ORMES).** Morocco

**PEACE BANI WALID ASSOCIATION FOR CHARITABLE WORK.** Libya

**PEACE INITIATIVES.** Lebanon

PMC-EUROPE. France

PRINCE TALAL BIN MOHAMMED HOUSING SUBURB ASSOCIATION FOR SOCIAL DEVELOPMENT. Jordan

REBUKE. Libya

REF - RÉSEAU EUROMED. France

RÉSEAU EUROMED DES ONG. Morocco

ROBERTO CIMETTA FUND. France

ROLES FOR SOCIAL CHANGE ASSOCIATION - ADWAR. Palestine

SAWA FOR DEVELOPMENT ASSOCIATION. Lebanon

SHAD. Egypt

SNESC SOLIDARITÉ NUMÉRIQUE ÉDUCATION ET SANTÉ CASTRES. France

STICHTING MISSION LANKA. The Netherlands

THE EGYPTIAN ASSOCIATION FOR THE ADVANCEMENT OF COMMUNITY PARTICIPATION IN FAYOUM. Egypt

THE JORDANIAN HASHEMITE FUND FOR HUMAN DEVELOPMENT (JOHUD). Jordan

THE NATIONAL FOUNDATION FOR CIVIL SOCIETY DEVELOPMENT. Croatia

TRANSHOMOSDZ. Algeria

TUNISIAN ACTIVE NETWORK FOR SOCIAL ACCOUNTABILITY. Tunisia

TUNISIAN FORUM FOR YOUTH EMPOWERMENT. Tunisia

UN PONTE PER NGO. Italy

WATER DYNAMIC ORGANISATION. Tunisia

WE PARTICIPATE FOR CIVIL SOCIETY DEVELOPMENT. Jordan

WESTERN SAHARA RESOURCE WATCH. Belgium

WEYOUTH ORGANIZATION. Tunisia

WOMEN AND SOCIETY FOR COMPREHENSIVE DEVELOPMENT. Egypt

WOMEN'S NGOS COOPERATION NETWORK OF LATVIA. Latvia

YALA ACADEMY. Morocco

YOUTH AND CIVIL INITIATIVES IN THE ROSE VALLEY. Bulgaria

YOUTH DEVELOPMENT ORGANIZATION YDO. Lebanon

YOUTH SPIRIT CENTER. Jordan

## **Company (business sector)**

**AHA MOMENTS, CENTRE FOR INTERCULTURALITY, SOLUTIONS FOCUS AND HOST LEADERSHIP.** Bulgaria

**ASTATIS.** Luxemburg

**BUSINESS SOLUTIONS.** Tunisia

**CABINET DONIA HEDDA ELLOUZE.** Tunisia

**ITALIAN BANKING, INSURANCE AND FINANCE FEDERATION (FEBAF).** Italy

**JORDAN PHARMACISTS ASSOCIATION.** Jordan

## **EU institution**

**ETF, EUROPEAN TRAINING FOUNDATION**

**EU DELEGATION TO LEBANON**

**EU DELEGATION TO PALESTINE**

**EU INSTITUTE FOR SECURITY STUDIES**

## **Governmental**

**ASSOCIATION EUROMED IHEDN.** France

**CONSEIL RÉGIONAL OCCITANIE.** France

**DIPUTACIÓ DE BARCELONA.** Spain

**DIRECTORATE GENERAL OF ANTIQUITIES AND MUSEUMS.** Syria

**GENERAL SECRETARY FOR EXTERNAL ACTION - JUNTA DE ANDALUCÍA.** Spain

**LEBANESE STATE SECURITY.** Lebanon

**MINISTRY FOR GOZO.** Malta

**MINISTRY OF JUSTICE.** Lebanon

**MINISTRY OF TRADE AND INDUSTRY.** Egypt

**MUNICIPALITY OF ZAHLE - MAALAKA & TAANAYEL.** Lebanon

**POLISH INSTITUTE OF INTERNATIONAL AFFAIRS.** Poland

**PROVENCE-ALPES-CÔTE D'AZUR RÉGION.** France

**STATE SECURITY.** Lebanon

## International organisation

**COPPEM - COMITATO PERMANENTE PER IL PARTENARIATO EURO-MEDITERRANEO DEI POTERI LOCALI E REGIONALI.** Italy

**ECONOMIC RESEARCH FORUM.** Egypt

**EURO-MEDITERRANEAN WOMEN'S FOUNDATION.** France

**EUROPEAN ENDOWMENT FOR DEMOCRACY.** Tunisia

**INTERNATIONAL CENTRE FOR AUDIOVISUAL CREATIVITY - UNESCO AUDIOVISUAL E-PLATFORM.** Spain

**INTERNATIONAL LABOUR ORGANIZATION (ILO)**

**LEAGUE OF ARAB STATES**

**NORTH-SOUTH CENTRE OF THE COUNCIL OF EUROPE**

**PLAN BLEU.** France

**REHABIMED**

**RÉSEAU MÉDITERRANÉEN DES ORGANISMES DU BASSIN**

**THE UNITED RELIGIONS INITIATIVE - MENA**

**UNESCO**

**UNION FOR THE MEDITERRANEAN**

**UNODC**

## Media

**ARAB WOMEN MEDIA CENTER.** Jordan

**ATALAYAR.COM.** Spain

**CORREOMAADRID.COM.** Spain

**DARAJ.** Lebanon

**OBSERVATÓRIO IBÉRICO ENERGIA.** Portugal

**STUDIO MASR.** Egypt

## Think tank

**AL-AHRAM CENTER FOR POLITICAL AND STRATEGIC STUDIES (ACPSS).** Egypt

**ARAB FORUM FOR ALTERNATIVES FOR SOCIAL STUDIES.** Lebanon

**ARAB REFORM INITIATIVE.** France

**ASSOCIATION DES ÉTUDES INTERNATIONALES.** Tunisia

**CANDID FOUNDATION PARIS OFFICE.** France

**CENTER FOR SOCIAL AND ECONOMIC RESEARCH (CASE).** Poland

**CENTER FOR STRATEGIC STUDIES.** Jordan

**CENTRE MAROCAIN D'ÉTUDES ET DE RECHERCHE INTERNATIONALES.** Morocco

**CYPRUS RESEARCH CENTRE.** Cyprus

**EUROPEAN ENDOWMENT FOR DEMOCRACY.** Belgium

**FORUM EUROMÉDITERRANÉEN DES INSTITUTS DE SCIENCES ÉCONOMIQUES (FEMISE).** France

**FUNDACIÓN ALTERNATIVAS.** Spain

**GROUPEMENT D'ÉTUDES ET DE RECHERCHE SUR LA MÉDITERRANÉE (GERM).** Morocco

**IAG.** Syria

**IDEAZ INSTITUTE FOR INTERCULTURAL AND COMPARATIVE RESEARCH.** Austria

**INSTITUTE FOR NATIONAL SECURITY STUDIES (INSS).** Israel

**INSTITUT ROYAL DES ÉTUDES STRATÉGIQUES (IRES).** Morocco

**INTERNATIONAL INSTITUTE FOR SOCIAL AND ECONOMIC STUDIES.** Austria

**ISTITUTO AFFARI INTERNAZIONALI (IAI).** Italy

**LIBERAL DEMOCRACY INSTITUTE.** Egypt

**MEDITERRANEAN PROTECTED AREAS NETWORK (MEDPAN).** France

**THE ISRAELI INSTITUTE FOR REGIONAL FOREIGN POLICIES (MITVIM).** Israel

**MOROCCAN INSTITUTE FOR POLICY ANALYSIS.** Morocco

**NEW WORLD ORDER DEVELOPMENT FORUM (NWOD FORUM).** Sweden

**OBSERVATOIRE TUNISIEN DE LA TRANSITION DÉMOCRATIQUE.** Tunisia

**PALESTINIAN CENTER FOR MEDIA, RESEARCH AND DEVELOPMENT.** Palestine

**POLICY CENTER FOR THE NEW SOUTH.** Morocco

**RABAT SOCIAL STUDIES INSTITUTE (RSSI).** Morocco

**THE FMES INSTITUTE.** France

**THE MACRO CENTER FOR POLITICAL ECONOMICS.** Hungary

**THE MEDITERRANEAN GROWTH INITIATIVE / ELIAMEP.** Greece

**THE SPIRAL, HOLISTIC EDUCATION, HUMAN VALUES, LIFELONG LEARNING.** Greece

**THE WEST ASIA - NORTH AFRICA (WANA) INSTITUTE.** Jordan

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- ATTALLA, MARIAM.** Egypt
- ATTAR, SAMAR.** Syria
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- BADR, HANAN.** Professor. Egypt
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**LAGRO, ESRA.** Vice-President. CIRP. Turkey

**LAHLOU, MEHDI.** Professeur. INSEA - Université Mohamed V. Morocco

**LAHOUARI, ADDI.** Professeur émérite. Sciences Po Lyon. Algeria

**LAMA, HAITHEM.** Director of Public Relations. Peace Bani Walid Association for Charitable Work. Libya

**LANDABURU, ENEKO.** Institut Jacques Delors. Spain

**LANQUAR, ROBERT.** Professor Director Research. UMEF Swiss University. France

**LAPIDOT-FIRILLA, ANAT.** Israel

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**LAZZERI, YVETTE.** France

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**LEVI, GIOVANNI.** Italy

**LEVITE, HERVÉ.** France

**LUBANOV, CARMIT.** Executive Director. Association of Environmental Justice in Israel (AEJI). Israel

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**MALVANI, MATTEO.** Italy

**MANSOUR, SANDRINE.** France

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**MAREE, ABDULLAH.** Palestine

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- MEKOUAR, MEROUAN.** Associate Professor. York University. Morocco
- MELASUO, TUOMO.** Professeur émérite. Institut de Recherche sur la Paix à Tampere, Université de Tampere. Finland
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- MESGHOUNI, NADIA.** Tunisia
- MESSAOUDI, AHMED.** Directeur Général de la Migration du Travail. Ministère de la Formation Professionnelle et de l'Emploi. Tunisia
- MICHON, ANTOINE.** President. Sine Qua Non. France
- MIEHE, LUCA.** Germany
- MINGOZZI, CHIARA.** Italy
- MIQUEL, SERGE.** Président. Association La Goutte d'Ô. France
- MIRA, LAMIA.** Algeria
- MIRALLES CODORNIU, CLARA.** Legal Counsel. Spain
- MITCHELL, GABRIEL.** Israel
- MLADENOVA, CALINA.** Italy
- MOKRANI, ALI.** Algeria
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- MORANDINI, VERA.** Programme Manager EU. Italy
- MORENO, JUAN ANTONIO.** Spain
- MOSCHIS-GAUGUET, ALIKI.** Member of Advisory Council. Anna Lindh Foundation. Greece
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**NARI, SABINA.** Italy

**NATORSKI, MICHAL.** Assistant Professor. Maastricht University and United National University-MERIT. Poland

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**ÖZGÖKER, CELIL UĞUR.** Cyprus

**PANEBIANCO, STEFANIA.** Jean Monnet Professor. University of Catania. Italy

**PECORA, GIULIO.** Journalist. Consultant on international media relations. Italy

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**PÉREZ BARRIOS, FERNANDO.** Spain

**PÉREZ, SONIA.** Spain

**PERSAUD, ALBERT.** Co-Founder-The Centre for Applied Research and Evaluation - International Foundation. (CAREIF). United Kingdom

**PETIAU-KERZERHO, CATHERINE.** Spain

**PIAI, CRISTINA.** Italy

**PUIGVÍ, JOSEP.** Spain

**QADAFI, FATIMAH.** Member. Shaghef Organization. Libya

**QUAGLIAROTTI, DESIRÉE.** Researcher, CNR-ISMed. Italy

**RABAH, BENZINA.** Manager. Algeria

**RABOUZY, FATIMA-ZAHRA.** Étudiante en Master 2. Institut Agronomique Méditerranéen de Montpellier. Morocco

**RAEI, LAMIA.** Jordan

**RAMADAN, MOHAMMAD.** Country Director. Cowater International / SEED Project. Jordan

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**REY, MARIE-ESTELLE.** Senior Advisor, MENA-OECD Programme on Competitiveness. OECD. France

**RICHARD, JEAN-CLAUDE.** France

**RIDANOVIC, AIDA.** Croatia

**RITAB, FATIMA ZAHRA.** Morocco

**RIVERA ESCARTÍN, ADRIÀ.** IBEI. Spain

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**RODRÍGUEZ GARCIA, LETICIA.** PhD Candidate. Granada University. Spain

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**ROMANS I TORRENT, ARIADNA.** Former president and member of deba-t.org. Spain

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**ROSSI, GIUSY.** Cultural planner. Italy

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**RÓZSA N., ERZSÉBET.** Professor. Institute of World Economics. Hungary

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**SALAZAR, ALMUDENA.** Spain

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**SALHI, SALAH EDDINE.** Assistant Professor. Université Abou Bekr Belkaid. Tlemcen. Algeria

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**SANSON, MAXIME.** Président. TIME4. France

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- STRANGIS, DAVIDE.** Executive Director. Conference of Peripheral Maritime Regions. Italy
- SUAREZ COLLADO, ANGELA.** Spain
- SULEIMAN, HUSSEIN MOHAMMED.** Egypt
- SVEDKAUSKAS, ZILVINAS.** Researcher. University of Tübingen. Lithuania
- TAL, ABRAHAM.** Manager and owner. A.TAL Satellite Imagery. Israel
- TALBOT, VALERIA.** Co-head MENA Centre. ISPI. Italy
- TANNOUS, HALA.** Communication and Information Focal Point. UNESCO. Palestine
- TARLAO, MICHELE.** Anti Narcotics and Organized Crime Advisor. Eupol Copps CSDP Mission. Italy
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- TASTAN, KADRI.** Senior Fellow. GMF. Belgium
- TAWFIK-EDDINE, CHERBAL.** Executive Manager. Lab. support services. Algeria
- TERRUSO, FILIPPO.** Italy
- THIEUX, LAURENCE.** Professeur. Université Complutense. France
- TLEMÇANI, RACHID.** Professeur. Algeria
- TORBEY, CHARBEL.** Lebanon
- TORJMANE, SALMA.** Student. College of Europe. Tunisia
- TOTH, RICHARD.** Counsellor. Permanent Representation of the Slovakia to the EU. Slovakia
- TOUATI, HOUARI.** Directeur d'études. École des hautes études en sciences sociales (EHESS, Paris). Algeria
- TOUHTOUH, RACHID.** Associate Professor. INSEA. Morocco
- TOVIAS, ALFRED.** Emeritus Professor. Department of International Relations. Hebrew University. Israel
- TRAMONTINI, LESLIE.** Germany
- TRIVIÑO SALAZAR, JUAN CARLOS.** Spain
- TRUNK, NADA.** Slovenia
- TUKA, AGNES.** Assistant professor. Department of Political Science and International Studies, University of Pécs. Hungary
- ULIED, AGUSTÍN.** Professeur. ESADE. Spain

**UNLUHISARCIKLI, OZGUR.** Ankara Office Director. GMFUS. Turkey

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**VAN HELTEN, JEAN JACQUES.** The Netherlands

**VARELA ORTEGA, CONSUELO.** Professor Emeritus. Universidad Politécnica de Madrid. Spain

**VARELLA, EVANGELIA.** Professeur. Université Aristote de Thessalonique. Greece

**VASCONCELOS, ALVARO.** Forum Demos. Portugal

**VELASCO, MARCO.** Spain

**VELICHKOV, KAMEN.** Lecturer. Sofia University. Bulgaria

**VENTURA OLLER, JOSEP.** Spain

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**VICARIO, LETICIA.** Spain

**VICENS I VICENS, ANTONI.** Director General for External Relations. Govern de les Illes Balears. Spain

**VIDAL, ALBERT.** Spain

**VIDAL, ÉMILIE.** France

**VIDAL, LURDES.** Department Director. IEMed. Spain

**VLOEBERGHES, WARD.** Belgium

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**WAHEED, MARIAM.** Assistant Professor. Faculty of Economics and Political Science, Cairo University. Egypt

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**WIDDERSHOVEN, CYRIL.** Director. VEROCY. The Netherlands

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**ZARE, KAMBIZ.** France

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**ZAYED, MENNA.** Egypt

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**ZEITOUN, ANAN.** Jordan

**ZEKRI, AHMED.** Professeur de l'Enseignement Supérieur. Université Mohammed V Rabat. Morocco

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**ZUREIQAT, HALA.** Media Consultant. Roya TV. Jordan

# III SAMPLE OF THE SURVEY

## SAMPLE OF THE SURVEY

	ANSWERS 2017		ANSWERS 2018		ANSWERS 2019		ANSWERS 2020	
COUNTRY	TOTAL	% TOTAL SURVEY	TOTAL	% TOTAL SURVEY	TOTAL	% TOTAL SURVEY	TOTAL	% TOTAL SURVEY
Morocco	63	8,4%	97	11,9%	78	10,4%	64	8,1%
Algeria	27	3,6%	43	5,3%	53	7,1%	51	6,5%
Turkey	35	4,7%	30	3,7%	30	4,0%	-	-
Egypt	35	4,7%	43	5,3%	41	5,5%	48	6,1%
Tunisia	68	9,1%	70	8,6%	54	7,2%	51	6,5%
Syria	6	0,8%	6	0,7%	7	0,9%	8	1,0%
Israel	24	3,2%	24	2,9%	17	2,3%	23	2,9%
Palestine	16	2,1%	22	2,7%	17	2,3%	21	2,7%
Lebanon	24	3,2%	26	3,2%	35	4,7%	46	5,8%
Jordan	20	2,7%	18	2,2%	26	3,5%	37	4,7%
Mauritania	6	0,8%	14	1,7%	2	0,3%	-	-
Libya	5	0,7%	4	0,5%	5	0,7%	12	1,5%
Albania	3	0,4%	5	0,6%	12	1,6%	-	-
Bosnia and Herzegovina	2	0,3%	1	0,1%	4	0,5%	-	-
Montenegro	1	0,1%	3	0,4%	0	0,0%	-	-
<b>TOTAL MPCs</b>	<b>335</b>	<b>44,9%</b>	<b>406</b>	<b>49,7%</b>	<b>381</b>	<b>50,7%</b>	<b>361</b>	<b>46,7%</b>
France	52	7,0%	56	6,9%	53	7,1%	80	10,1%
Spain	63	8,4%	71	8,7%	69	9,2%	106	13,4%
Italy	68	9,1%	60	7,3%	58	7,7%	66	8,4%
Germany	35	4,7%	39	4,8%	25	3,3%	24	3,0%
United Kingdom	21	2,8%	22	2,7%	16	2,1%	-	-
Belgium	13	1,7%	14	1,7%	16	2,1%	18	2,3%
Portugal	4	0,5%	12	1,5%	9	1,2%	9	1,1%
Greece	12	1,6%	13	1,6%	22	2,9%	23	2,9%
Netherlands	15	2,0%	9	1,1%	5	0,7%	9	1,1%
Poland	14	1,9%	11	1,3%	8	1,1%	8	1,0%
Romania	4	0,5%	5	0,6%	1	0,1%	3	0,4%
Denmark	7	0,9%	1	0,1%	1	0,1%	2	0,3%
Czech Republic	10	1,3%	9	1,1%	3	0,4%	2	0,3%
Finland	8	1,1%	8	1,0%	6	0,8%	6	0,8%
Sweeden	6	0,8%	6	0,7%	6	0,8%	7	0,9%
Austria	9	1,2%	9	1,1%	10	1,3%	6	0,8%
Ireland	4	0,5%	7	0,9%	3	0,4%	0	0,0%
Hungary	9	1,2%	5	0,6%	2	0,3%	3	0,4%
Cyprus	5	0,7%	5	0,6%	2	0,3%	2	0,3%
Slovakia	3	0,4%	2	0,2%	2	0,3%	2	0,3%
Slovenia	6	0,8%	10	1,2%	5	0,7%	3	0,4%
Lithuania	2	0,3%	2	0,2%	3	0,4%	3	0,4%
Malta	4	0,5%	5	0,6%	4	0,5%	4	0,5%
Latvia	1	0,1%	1	0,1%	5	0,7%	1	0,1%
Bulgaria	2	0,3%	7	0,9%	7	0,9%	6	0,8%
Estonia	4	0,5%	1	0,1%	0	0,0%	0	0,0%
Luxembourg	3	0,4%	2	0,2%	2	0,3%	2	0,3%
Croatia	8	1,1%	6	0,7%	19	2,5%	13	1,6%
<b>TOTAL EU</b>	<b>392</b>	<b>52,5%</b>	<b>398</b>	<b>48,7%</b>	<b>362</b>	<b>48,2%</b>	<b>408</b>	<b>51,3%</b>
<b>OTHER*</b>	<b>19</b>	<b>2,5%</b>	<b>13</b>	<b>1,6%</b>	<b>8</b>	<b>1,1%</b>	<b>20</b>	<b>2,6%</b>
<b>TOTAL</b>	<b>746</b>	<b>100,0%</b>	<b>817</b>	<b>100,0%</b>	<b>751</b>	<b>100%</b>	<b>789</b>	<b>100,0%</b>

## **IV QUESTIONNAIRE**

## COMPOSITION OF THE SAMPLE

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.

### Gender

Male	
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Female	
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### Nationality

Albania	
Algeria	
Austria	
Belgium	
Bulgaria	
Croatia	
Cyprus	
Czech Republic	
Denmark	
Egypt	
Estonia	
Finland	
France	
Germany	
Greece	
Hungary	
Ireland	
Israel	
Italy	
Jordan	

Latvia	
Lebanon	
Lithuania	
Luxembourg	
Libya	
Malta	
Morocco	
Netherlands	
Palestine	
Poland	
Portugal	
Romania	
Slovakia	
Slovenia	
Spain	
Sweden	
Syria	
Tunisia	
Other	

### Sector

	Civil society organisation
	Think tank
	Academic
	Media
	Company (business sector)

	Government
	International organisation
	EU institution
	Other

## BLOCK I

### NEW OPPORTUNITIES FOR EURO-MEDITERRANEAN COOPERATION, ITS IMPACT AND REGIONAL DIMENSION

Q.1 Renewing the partnership between the European Union and its southern partners, as part of the European Neighbourhood Policy, will provide an opportunity to further tackle common challenges.

For which of the following challenges are greater efforts needed? Please choose and rank your top 3 options

1. Environmental degradation and climate change	
2. Governance and rule of law	
3. Human rights and equality	
4. Inclusive economic growth and social dimension	
5. Migration and human mobility	
6. Peace, security and stability of the region	
7. Other:	
8. Comments:	
I have no particular views on this matter	

Q.2 While dealing with these challenges, what are the main opportunities that the European Union and its southern partners should jointly seize? Please choose and rank your top 3 options

1. Cooperation on research and innovation	
2. Crafting a new trade and investment agenda, including the possibility to promote shorter value chains	
3. Crafting a shared digitalisation agenda	
4. Promoting an inclusive socioeconomic agenda, for the benefit of youth, women and vulnerable groups	
5. Renewing cooperation on migration	
6. Working together to make the green transition possible	
7. Other:	
8. Comments:	
I have no particular views on this matter	

Q.3 In dealing with the challenges you identified in Q.1, which of the following do you consider the most effective regional and multilateral partner(s) for the European Union?

	Union for the Mediterranean	League of Arab States	African Union	Gulf Cooperation Council	NATO	United Nations	World Bank Group and International Financial Institutions	Other
1. Chosen option in Q.1								
2. Chosen option b in Q.1								
3. Chosen option c in Q.1								
I have no particular views on this matter								

Q.4 Regional and sub-regional initiatives have been consolidated over the last few years, including the Union for the Mediterranean, the 5+5 Dialogue, the WestMED initiative, the EastMed Gas Forum and the Agadir Agreement. What could the European Union do to further support these institutional frameworks and their potential in addressing the challenges in the region?

Please share your thoughts:	
I have no particular views on this matter	

Q.5 What is the European Union's added value compared to other global players that are increasingly active in the region? Please choose and rank your top 3 options

Its commitment to:	
1. Addressing security and migration challenges in the region	
2. Becoming climate-neutral by 2050 and promoting a Green Agenda	
3. Contributing to sustainable and inclusive economic development	
4. Cooperating on a range of mutual priorities, such as research or cultural dialogue	
5. Promoting good governance, democracy, rule of law and human rights	
6. Respecting the principles of the European Neighbourhood Policy, including ownership and differentiation, vis-à-vis its partners	
7. Supporting civil society	
8. Supporting regional integration and multilateralism	
9. Other:	
10. Comments:	
I have no particular views on this matter	

Q.6 Over the last five years, there have been several factors limiting the success of the cooperation between the European Union and its southern neighbours, and ultimately its impact on improving the life of people in southern neighbouring countries.

What were the major constraints? Please choose and rank your top 3 options

1. Corruption, insufficient governance and institutional capacity	
2. Donor dispersion and lack of coordination	
3. Insufficient communication about the benefits of the joint cooperation and of European Union assistance	
4. Lack of mobilisation of the private sector	
5. Lack of regional integration and cooperation among countries, including on infrastructure connectivity	
6. Prevailing conflict situations	
7. Wrong priorities co-identified by the European Union and its partners	
8. Other:	
9. Comments:	
I have no particular views on this matter	

Q.7 What is the most successful action of the European Union in the southern neighbourhood or in your own country (if you are indeed from a southern neighbourhood country)?

Please share your thoughts:	
I have no particular views on this matter	

Q.8 In a few words, tell us what should change by 2030 in order for you to assess that the Euro-Mediterranean cooperation has delivered?

Please share your thoughts:	
I have no particular views on this matter	

## BLOCK II

### HUMAN DEVELOPMENT, GOVERNANCE AND MIGRATION

Q.9 Civil society plays a major role in delivery of services and advocacy for better governance but in some countries it is under pressure.

What could the European Union do to further support civil society in Southern Mediterranean Countries in fully playing its role? Please choose and rank your top 3 options

1. Help establish networks and platforms to link up civil society actors	
2. Involve civil society in policy dialogue	
3. Strengthen the capacity of civil society actors	
4. Use dialogue with partner countries to push for more space for civil society	
5. Other:	
6. Comments:	
I have no particular views on this matter	

Q.10 When it comes to supporting reforms in the fields of good governance, democracy, the rule of law and human rights:

Please choose 1 option

1. The European Union should be more assertive vis-à-vis governments and make use of conditionality, when commitment by partners to such reforms is lacking	
2. The European Union should continue to strengthen its engagement with civil, economic and social actors to make the case for fundamental reforms with partners	
3. The European Union should support governments for reforms in key areas such as justice, rule of law and human rights	
4. Other:	
5. Comments	
I have no particular views on this matter	

Q.11 The New Pact on Migration and Asylum presented by the European Union in September 2020 aims to maximise the impact of mutually beneficial international partnerships. It outlines 5 priorities for action on the external dimension.

Which of these actions are the most important to you? Please choose and rank your top 3 options

1. Building economic opportunity and addressing root causes of irregular migration	
2. Developing legal pathways to Europe and Talent Partnerships	
3. Improving return and readmission, stepping up voluntary returns and helping reintegration	
4. Partnerships to strengthen migration governance and management, including fighting migrant smuggling	
5. Protecting those in need and supporting countries hosting refugees	
6. Other:	
7. Comments:	
I have no particular views on this matter	

## INCLUSIVE, RESILIENT AND SUSTAINABLE ECONOMIES

Q.12 What are the most effective ways to foster more inclusive economies in the southern neighbourhood countries? Please choose and rank your top 3 options

1. Developing vital infrastructures in areas such as energy, transport, digital, health and housing, also at local and municipal level	
2. Enhancing access to finance for businesses and entrepreneurs, with a focus on financial inclusion	
3. Greater investments in human capital by reforming education, vocational training and reskilling	
4. Improving social protection schemes and equitable delivery of basic services	
5. Promoting cooperation on research and innovation to enhance knowledge sharing and skills	
6. Promoting new and inclusive business models, such as green, circular and social economies	
7. Supporting an enabling environment for conducting business, trade and investment	
8. Other:	
9. Comments:	
I have no particular views on this matter	

Q.13 Overall, Southern Mediterranean Countries have only limited budgetary margins in order to develop a comprehensive recovery plan and confront new challenges.

In this context, what should the European Union prioritise? Please choose and rank your top 3 options

1. Foster macroeconomic financial assistance in cooperation with international organisations such as the IMF	
2. Privilege grants rather than loans and financial instruments, especially in fragile countries	
3. Promote a discussion with its member states and IFIs on the possibility of rescheduling debt payments	
4. Provide blended finance and guarantees so that countries have access to finance at lower and concessional rates	
5. Support partner countries in public finance reforms and revenue mobilisation	
6. Other:	
7. Comments:	
I have no particular views on this matter	

Q.14 What should be done in order to stimulate trade relations between the EU and its southern partners? Please choose and rank your top 3 options

1. Deepen regional economic integration, either among southern neighbourhood countries or with countries in Sub-Saharan Africa	
2. Enhance market access – whether through the Deep and Comprehensive Free Trade Agreement process or through modernisation of agreements – by including services and investment	
3. Make better use of agreements already in place, and implement existing provisions, focusing on their potential (Association Agreements, Free Trade Agreements)	
4. Provide additional support to partners to modernise often outdated technical regulations that impede trade	
5. Support European Union businesses to shorten supply chains and develop regional value chains in targeted sectors in the southern neighbourhood	
6. Other:	
7. Comments:	
I have no particular views on this matter	

Q.15 What should be done to boost EU Foreign Direct Investment to southern neighbourhood countries? Please choose and rank your top 3 options

1. Partners should step up their efforts for a conducive investment climate through regulatory reforms and modernisation	
2. The European Union should aim to ensure that investment yields a positive impact on job creation and contributes to sustainable development, for instance by enhancing links with the local economy, increasing value creation, and fostering financial inclusion	
3. The European Union should expand the capacity of the European Fund for Sustainable Development and its blending operations beyond its current list of partners and include new and innovative actors	
4. The European Union should expand the number of existing investment facilities and improve accessibility for specific target groups, such as refugees, women entrepreneurs and green and social entrepreneurs	
5. The European Union should target investment in areas where new opportunities arise, notably for the green and digital transitions	
6. Other:	
7. Comments:	
I have no particular views on this matter	

Q.16 What are the most effective ways to support a digitalisation agenda in the southern neighbourhood countries? Please choose and rank your top 3 options

1. Adapting education and vocational training to the requirements of digitalisation	
2. Enhancing digitalisation in the public sector and promoting e-governance	
3. Improving the regulatory framework and its enforcement, including competition and protection of consumer and individual rights	
4. Providing physical infrastructure, including connectivity and broadband with a special focus on rural areas	
5. Reinforcing the digital capacity of the private sector, especially micro and small enterprises with the aim of fostering innovation and new services	
6. Other:	
7. Comments:	
I have no particular views on this matter	

## BLOCK III

### ENVIRONMENT, ENERGY AND CLIMATE CHANGE RESILIENCE

Q.17 Which of the following elements are an effective way to support the green and sustainable transition in the southern neighbourhood countries? Please choose and rank your top 3 options

1. Conditionality to promote green reforms and circular economy	
2. Engaging with civil societies and NGOs as agents for change	
3. Partnering with the private sector to increase green finance and investments	
4. Tailored and needs-based transfers of knowledge and technology	
5. Targeted investments and donor support	
6. Other:	
7. Comments:	
I have no particular views on this matter	

Q.18 What should the European Union do to accompany the energy transition of the southern neighbourhood countries? Please choose and rank your top 3 options

1. Concentrate on smaller-scale and more decentralised projects (also at municipal or territorial level)	
2. Enhance energy cooperation with southern neighbourhood countries, and regulatory convergence with the European Union	
3. Mobilise investments in strategic and mega-projects for clean energy, building upon the potential of southern neighbourhood countries in renewable energies	
4. Promote technical and policy dialogues to support southern neighbours in improving their regulatory framework, including at regional level.	
5. Support its southern neighbours in increasing their energy efficiency and deployment of renewable energies by promoting reform and an improved business environment	
6. Other:	
7. Comments:	
I have no particular views on this matter	

Q.19 Recent scientific reports on climate and environmental change in the Mediterranean have recommended a number of measures, including the following ones.

What do you think should be addressed as a matter of priority? Please choose and rank your top 3 options

1. Improve management of non-indigenous species that may threaten human livelihoods	
2. Integrate approaches to promote sustainable water security	
3. Promote coastal adaptation practices to mitigate sea-level rise and its effects	
4. Promote measures to reduce the burden of climate change on human health	
5. Promote good practices in flood management	
6. Promote sustainable land management to halt the loss of land and protect the ecosystem	
7. Reinforce the resilience of the sectors most vulnerable to sea acidification (including tourism and recreation, red coral extraction and fisheries)	
8. Support the development of more integrated local climate plans	
9. Transformative changes in fire management practices	
10. Comments:	
I have no particular views on this matter	

## PEACE AND SECURITY COOPERATION

Q.20 The EU and its southern Mediterranean neighbours continue to be hit by terrorism.

Do you think the cooperation between the European Union and its counterparts in the southern neighbourhood in Prevention of Violent Extremism (PVE) and Countering Violent Extremism (CVE) since the review of the European Neighbourhood Policy in 2015 is working?

1. Yes	
2. No	
3. Don't know	
4. If No: what should be done differently?:	
I have no particular views on this matter	

Q.21 The COVID-19 pandemic has had a major impact on global security, including on organised crime and violent extremism. Cybercrime has emerged rapidly as a risk with long-term implications for the growth of criminal markets. The threat of violent extremism is also being exacerbated. More young people are spending more time at home and online, and are thus more susceptible to online recruitment and radicalisation. How should the European Union step up its response to these new security threats, in cooperation with its southern partners?

Please share your thoughts:	
I have no particular views on this matter	

Q.22 In order for the EU to contribute more effectively to solving conflicts in the region:  
Please choose and rank your top 3 options

1. The European Union member states should unify their positions and speak with one voice	
2. The European Union should use its diplomatic convening power (e.g. Syria conference)	
3. The European Union should make more strategic use of its sanctions	
4. The European Union should make more integrated use of its Common Security and Defence Policy and cooperation instruments	
5. Other:	
6. Comments:	
I have no particular views on this matter	

Q.23 Maritime security/border control in the Mediterranean (EUNAVFOR MED IRINI) and counter-terrorism in the Sahel (EUTM Mali, EUCAP Sahel Mali, EUCAP Sahel Niger) are key Common Security and Defence Policy (CSDP) actions of the EU in the region. In both cases, EU cooperation with its direct southern partners is pivotal. How do you assess the cooperation of the European Union with its southern partners?

	Very bad	Bad	Neither good nor bad	Good	Very good	Don't know
1. On maritime security?						
2. What should be improved?						

	Very bad	Bad	Neither good nor bad	Good	Very good	Don't know
3. On counter-terrorism in the Sahel						
4. What should be improved?						

5. Comments:					
I have no particular views on this matter					





THE EUROPEAN INSTITUTE OF THE MEDITERRANEAN (IEMED), FOUNDED IN 1989, IS A THINK AND DO TANK SPECIALISED IN EURO-MEDITERRANEAN RELATIONS. IT PROVIDES POLICY-ORIENTED AND EVIDENCE-BASED RESEARCH UNDERPINNED BY A GENUINE EUROMED MULTIDIMENSIONAL AND INCLUSIVE APPROACH.

THE AIM OF THE IEMED, IN ACCORDANCE WITH THE PRINCIPLES OF THE EURO-MEDITERRANEAN PARTNERSHIP (EMP), THE EUROPEAN NEIGHBOURHOOD POLICY (ENP) AND THE UNION FOR THE MEDITERRANEAN (UFM), IS TO STIMULATE REFLECTION AND ACTION THAT CONTRIBUTE TO MUTUAL UNDERSTANDING, EXCHANGE AND COOPERATION BETWEEN THE DIFFERENT MEDITERRANEAN COUNTRIES, SOCIETIES AND CULTURES, AND TO PROMOTE THE PROGRESSIVE CONSTRUCTION OF A SPACE OF PEACE AND STABILITY, SHARED PROSPERITY AND DIALOGUE BETWEEN CULTURES AND CIVILISATIONS IN THE MEDITERRANEAN.

THE IEMED IS A CONSORTIUM COMPRISING THE CATALAN GOVERNMENT, THE SPANISH MINISTRY OF FOREIGN AFFAIRS, EUROPEAN UNION AND COOPERATION, THE EUROPEAN UNION AND BARCELONA CITY COUNCIL. IT ALSO INCORPORATES CIVIL SOCIETY THROUGH ITS BOARD OF TRUSTEES AND ITS ADVISORY COUNCIL.

## INTRODUCTION

## DESCRIPTIVE REPORT

## QUALITATIVE REPORT

CAN THE EU SHARE VALUES WITH ITS PARTNERS IN THE SOUTHERN NEIGHBOURHOOD?

James Moran

FROM HOT SEAT TO POWERHOUSE: MANAGING CLIMATE CHANGE IN THE SOUTHERN NEIGHBOURHOOD

Florence Gaub

DIGITAL TRANSFORMATION IN THE SOUTHERN NEIGHBOURHOOD

Katarzyna W. Sidło

THE NEW EU AGENDA FOR THE SOUTHERN MEDITERRANEAN: PROSPECTS FROM MOROCCO

Nezha Alaoui M'Hamdi

A QUICK SURVEY OF EU-ISRAEL BILATERAL RELATIONS 25 YEARS AFTER THE BARCELONA PROCESS

Alfred Tovias

REFLECTIONS ON EU-JORDANIAN COOPERATION: TOWARDS TERTIARY ECONOMICS

Kareem Sharabi Rosshandler

EGYPT AND THE EU: TEN YEARS AFTER THE ARAB UPRISING

Gamal A. Gawad Soltan

## ANNEXES

