



**ROME** 2016

**MED**

MEDITERRANEAN DIALOGUES

LEAVING  
THE STORM  
BEHIND:  
**IDEAS  
FOR A NEW  
MEDITERRANEAN**

REPORT

SCIENTIFIC  
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# PREFACE

**T**he second edition of Rome MED – Mediterranean Dialogues comes at a time when challenges and threats intensify in a region that has become more and more unstable and fragmented. However, the Mediterranean is not only an area of conflict and crisis, but also a space for momentous opportunities. The ultimate goal of Rome MED 2016 is to overcome pessimism and develop a positive agenda for the region, by turning Rome into a hub for dialogue on four main topics: shared prosperity, shared security, migration, and culture & civil society.

The MED Report intends to build upon these four pillars and provide a useful tool to stimulate debate during Rome MED and beyond. In particular, the Report is meant to launch new ideas to “leave the storm behind” and design a positive agenda for the future building on experts’ insights and policy suggestions. The volume is enriched by infographics and maps depicting the main regional trends. The goal of the Report is not to delve exhaustively into all the questions and the issues that concern the region and on which its future depends, but to provide in-depth insights and to formulate concrete proposals.

This was made possible by the precious contributions of all the MED scientific partners: Bruegel, the Royal Institute of International Affairs-Chatham House, Deutsche Gesellschaft für Auswärtige Politik-DGAP, the European Council of Foreign Relations-ECFR, the European Institute University-EUI, Institut français des relations internationales-IFRI. Special thanks are due to experts and scholars who also contributed to the report and to all those who joined us on the way to MED 2016. Without their support and hard work, this volume would not have been possible.

**Paolo Magri**

ISPI Executive Vice President and Director

# TABLE OF CONTENTS

## SHARED SECURITY

Towards a Shared Security Framework?	6
<i>Formulating a new security architecture for the Middle East,</i>	8
Ellie Geranmayeh, ECFR	
<i>Taking inspiration from the Helsinki process,</i> Julian Weinberg, Forward Thinking	9
The Land of Instability: Which Options for Peace?	10
<i>Some steps to rebuild peace in Syria,</i> Agnès Favier, EUI	12
<i>Overcoming the deadlock in Libya,</i> Arturo Varvelli, ISPI	14
<i>Yemen: avoiding a breakup,</i> Armando Sanguini, ISPI	16
Daesh: Reshaping the Middle East?	18
<i>Why Mosul matters,</i> Vali Nasr, Johns Hopkins University	20
Understanding Radicalization: Daesh as a Magnet?	22
<i>Why Daesh fascinates the youth,</i> Olivier Roy, EUI	24
The Arms Race in the MENA Region	26

## SHARED PROSPERITY

Euro-Med Economic Cooperation: Building New Bridges	30
<i>Finance, business environment and EIB in the MENA region,</i> Debora Revoltella and Frank Betz, EIB	32
Fostering Inclusive Economic Growth	34
<i>The Mediterranean rim: looking for a growth engine,</i> Mina Toksoz, Chatham House	36
Market Liberalization: Still Underway?	38
Increasing Investment for Development	40
<i>How to foster investment in the MENA region,</i> Maria Demertzis, Bruegel	42
Going Digital: Dream or Reality?	44
The Energy Puzzle: Towards Sustainable Security	46
<i>Turning the Mediterranean energy challenges into opportunities,</i>	48
Simone Tagliapietra, Bruegel and FEEM	
<i>Towards an Eastern Mediterranean gas hub?,</i> Manfred Hafner, FEEM	50



Mediterranean Connections: A Global Maritime Hub	52
Blooming the Desert: How to Cope with Water Scarcity?	54
Betting on Education: An Asset for the Future	56
<i>Investing more, investing better</i> , Sarah Hartmann, DGAP	58

## MIGRATION

At the Root of a Complex Phenomenon	62
<i>The Mediterranean: gateway to Europe's history and future</i> , Wolfgang Kaschuba, BIM	64
Migrants in Transit	66
<i>Facing a human and political challenge</i> , Dorothee Schmid, IFRI	68
Europe: What Lies Beyond the "Walls"?	70
<i>A realistic agenda on migrations from Africa</i> , Mattia Toaldo, ECFR	72
Syrian Refugee Crisis: Heading Towards a Better Regional Management	74
<i>Coping with the regional effects of the Syrian refugee crisis</i> , Samir Aita, Circle of Arab Economists	76

## CIVIL SOCIETY AND CULTURE

Cultural Encounters: Reshaping EU-MED Relations	80
<i>Feeding culture from below</i> , Claire Spencer, Chatham House	82
Cultural and Religious Diversity: The Challenge of Pluralism	84
<i>Managing diversity in the MENA region</i> , George Fahmi, EUI	86
How to Ensure Youth Inclusion in Political Transitions?	88
<i>No inclusion without intrusion in the mindset</i> , Dina Fakoussa, DGAP	90
Empowering Women to Empower Society	92
<i>Lessons from the Tunisian experience</i> , Wided Bouchamaoui, UTICA	94
Narrating the Other: How Do the Media Shape Perceptions?	96
<i>Reach out and listen: changing narratives for a new agenda in the Mediterranean</i> , Monica Maggioni, RAI	98
<b>References</b>	101
<b>List of indexes</b>	103

# SHARED SECURITY



# 1

## SHARED SECURITY

- 6 Towards a Shared Security Framework?
  - 10 The Land of Instability: Which Options for Peace?
  - 18 Daesh: Reshaping the Middle East?
  - 22 Understanding Radicalization: Daesh as a Magnet?
  - 26 The Arms Race in the MENA Region
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# TOWARDS A SHARED SECURITY FRAMEWORK?

**M**ore than 40 years ago, the Helsinki Final Act maintained that “security in Europe is closely linked with security in the Mediterranean area as a whole”. Today, the countries on both shores of the basin are still reflecting on the common challenges and opportunities posed by cooperation on security. Times have changed and in a region increasingly mangled by violence and turmoil in the wake of the 2011 Arab uprisings, the threats to stability and security have evolved too. At the same time, there is still the need for efficient and sound security institutions that would provide tangible answers to the multidimensional threats that jeopardize the entire region. This is undoubtedly a thorny issue, as the path towards the creation of a shared security architecture bristles with obstacles.

In order to set the right context to analyze the matter, it should be noted that there is a clear asymmetry in terms of common secu-

for a security framework in the MENA region is a debated issue among the experts.

Secondly, any attempt to set up a common security mechanism across the two shores of the Mediterranean must address a crucial issue: while the initiatives for dialogue have almost invariably followed a north-south approach, it is in fact along the south-south axis that the greatest threats to security are found. Over the last decades, all the efforts made to move towards the construction of a common security architecture – such as the NATO Mediterranean Dialogue and the so-called “5+5 Defense Initiative” – have not fully succeeded in solving the crises from which instability arises. Seemingly, even the Euro-Mediterranean Partnership, launched in Barcelona in 1995, was born under the sign of optimism in the wake of the Oslo accords between Israel and the Palestinians. But twenty years later, not only is the Arab-Israeli conflict – once perceived as the biggest threat to regional stability – still unresolved, but the regional context has actually further deteriorated due to crises in Libya, Syria and Yemen as well as to the establishment of the so-called Islamic State.

Furthermore, it is essential to bear in mind that security issues relate not only to conflicts, but that also to socio-economic aspects that are just as relevant. Both the phenomenon of radicalization and the issue of migration, for example, are in many cases strictly related to structural conditions of poverty and to the absence of prospects for the youth. In this context, in order to ensure a stable environment, security and socio-economic development should go hand in hand. With this approach in mind, a new model for an integrated and comprehensive security framework in the Mediterranean remains a top priority.

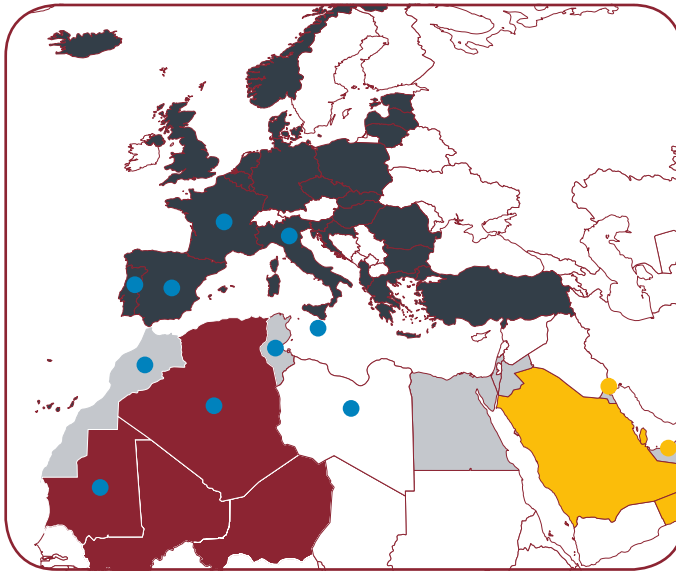
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## SECURITY RELATES NOT ONLY TO CONFLICTS, BUT IT ALSO INCLUDES SOCIO-ECONOMIC ASPECTS

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urity systems between the two shores of the Mediterranean basin. Although over the last decades European integration has grown, NATO still remains the keystone of European security and, through this system, the US too continues to play an important role on the Mediterranean chessboard. However, on the other side of the Mare Nostrum a chronic institutional security vacuum appears to persist and little progress has been made towards the establishment of common security and political mechanisms. The visions and interests of each actor tend to prevail over a shared security strategy. In this case, whether or not Helsinki could represent a “model”

## DEFENSE ALLIANCES AND PARTNERSHIPS



### ● NATO

Albania, Belgium, Bulgaria, Canada, Croatia, Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Turkey, United Kingdom, United States

### ● Major Non-NATO Allies

Bahrain, Egypt, Israel, Jordan, Kuwait, Morocco, Tunisia, United Arab Emirates

### ● 5 + 5 Initiative

Algeria, France, Italy, Libya, Malta, Mauritania, Morocco, Portugal, Spain, Tunisia.

### ● CEMOC COMBINED OPERATIONAL GENERAL STAFF COMMITTEE

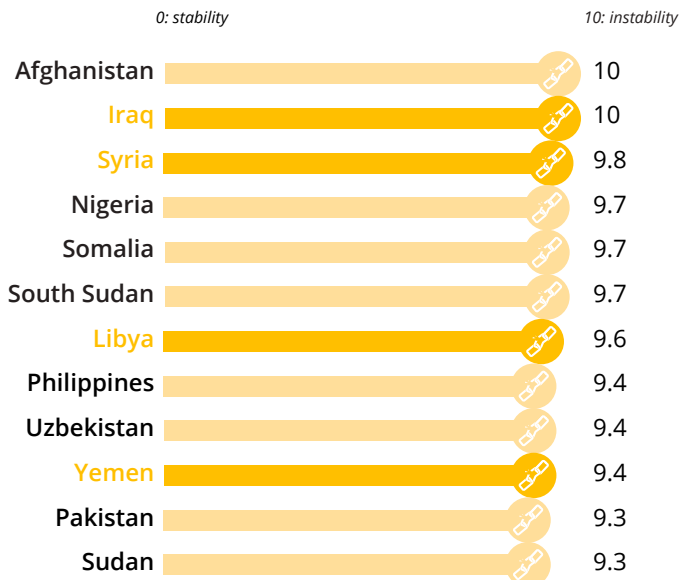
Algeria, Mali, Mauritania, Niger.

### ● GCC GULF COOPERATION COUNCIL

Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates.

Year: 2016

## THE CONCENTRATION OF INSTABILITY (Index of security apparatus instability - Worst countries in the world)



Year: 2016. Data: Fund for Peace



## NEW IDEAS

# FORMULATING A NEW SECURITY ARCHITECTURE FOR THE MIDDLE EAST



**Ellie Geranmayeh**

Policy Fellow, Middle East and North Africa Programme,  
European Council on Foreign Relations (ECFR)

*The power vacuums left in the aftermath of the invasion of Iraq in 2003 and the Syrian civil war, in combination with the surge in terrorist activities, and high levels of civilian loss and displacement from this region have made it more obvious than ever that a security architecture is urgently required.*

*The precedent that has often been used to advocate for a security architecture in the Middle East is the Helsinki OSCE model that took shape following the Cold War. But is such a classic security architecture, aimed at managing and easing tensions between two global powers, underpinned by the notion of stable state actors and clear sovereign territorial boundaries a relevant match for the realities unfolding in the Middle East?*

*Four factors should be considered. First, which regional states will form the pillars for this security architecture in the Middle East? Will today's regional powers, namely Saudi Arabia, Iran, Turkey, Israel and Egypt maintain their geopolitical positions in the next decade? In the coming decade we may well witness the political and military rise of smaller regional actors, such as the UAE and Qatar, which may require a more active role for them in a future security framework.*

*Second, can a security architecture deliver stability in the Middle East if one of the prominent state actors is excluded? To a degree both Israel and Saudi Arabia have already attempted to advance their own formula for security with the aim of containing or defending against a perceived threat from Iran. Any future model will have to provide a stake for the region's prominent and stable actors – to continue an exclusionary policy will likely induce those marginalized states to act as spoilers.*

*Third, what – if any – role ought to be carved out for non-state actors? The past decade of conflicts in the region has made evident that non-state actors will play a prominent role in providing and undermining security at both local and regional level. A security architecture for this region will have to consider what role to provide these groups in ways that minimize destabilization. International and state actors need to formulate a fresh system for interacting with – and possibly including a role for – non-state actors which will be dramatically different to the classic security architectures previously developed.*

*Fourth, is the Middle East likely to be ready for buying-into and implementing a holistic framework over the next decade? Will the necessary thresholds be reached by regional actors, such as Iran and Saudi Arabia, to depart from zero-sum calculations over conflicts in the Middle East? Given the fast-moving shifts and fluidity of security in the Middle East, is it worth devising potential frameworks now to be developed when the timing is right for peace? Is there a role, or enough leverage, for Europe and the US to help forge, in the interim, an informal architecture to be formalized only when this will be possible?*



## TAKING INSPIRATION FROM THE HELSINKI PROCESS



**Julian Weinberg**

Political Dialogues Director and Helsinki Policy Forum Manager,  
Forward Thinking

*The Mediterranean is a region in flux. The countries of the Middle East and North Africa are in a period of historic change, with direct repercussions for Europe. This Mediterranean space is more interconnected than ever, both within itself and beyond its borders. Yet also more fragmented, with a sense of political vacuum in which local, regional and international powers have sought to pursue their own interests at the expense of others.*

*Some of the many symptoms of this phenomenon are the unprecedented migration and refugee crisis, or risks of terrorism, that impact the countries in the Mediterranean. One result is that foreign policy and domestic policy are increasingly interlinked, heightening complexity and uncertainty in addressing the challenges.*

*However, such immediate crises have deeper root causes that must be addressed, including an essential economic component. Stability, to be sustainable, needs to improve the prospects for the region's citizens.*

*During the Cold War, the Helsinki Process provided a framework for dialogue and a mechanism for assessing and addressing the unforeseen consequences of events and crisis as they developed helping to manage tensions in a divided period in recent history.*

*Importantly, it offered a framework to allow co-existence and co-operation despite fundamental differences, and to build trust through dialogue and engagement. The "baskets" of the Helsinki Process were mechanisms to overcome obstacles for dialogue on practical issues.*

*The development of similarly relevant mechanisms is an essential tool to facilitate inclusive, multi-level engagement in the Mediterranean region today, the only way to generate the traction necessary to establish sustainable stability. "Baskets" could include humanitarian issues and migration, security and preventing terrorism, or economic development.*

*For example, addressing the challenges of irregular migration requires new levels of cooperation across the Mediterranean space that are responsive to local challenges in source and transit countries, as well as wider regional and international concerns.*

*With conflict and fragmentation present throughout the region, mechanisms that create informal channels between potential, and active, adversaries and combatants can defuse misunderstandings and tensions. Drawing inspiration from the Helsinki Process, the establishment of a framework for cooperation would support efforts to prevent crisis and address instability.*



# THE LAND OF INSTABILITY: WHICH OPTIONS FOR PEACE?

**T**he Middle East and North Africa are affected by a series of conflicts that undermine the stability and pose considerable risks to the security of the entire region. After the outbreak of the so-called Arab Spring, many countries have been plunged into conflicts, which almost six years on have not yet found a solution. In order to impact positively on the outcome of these conflicts and to reach a stable and lasting peace, it is first necessary to fully understand their nature, the interests at stake, and the positions of the different actors involved. While in some cases the wars on the borders of the Mediterranean are mainly of internal origin, in others they involve external actors too.

The hottest and certainly the most worrying front for the whole international community is that of Syria. More than five years on, the situation has not improved, rather it has

had to leave their homes, of which nearly 5 million are currently refugees abroad, in what is one of the worst humanitarian crises worldwide. The battle of Aleppo could be decisive for the course of the conflict, but it could drag on for months. In this scenario, in the absence of an agreement involving at least Washington, Moscow, Riyadh and Tehran, it is hard to expect any significant improvement.

A similar situation, albeit on a smaller scale, is afoot in Yemen. The Yemeni conflict started out as a struggle between different factions, but the external intervention of a regional (and substantially Sunni) Saudi-led coalition supported by the West has regionalized the conflict. The World Food Program has indicated that Yemen is the most food vulnerable country in the world, with about 14 million people in need of food assistance. Under these circumstances, a deal is all the more urgent, but peace will be possible only by overcoming the “frozen conflict” between Iran and Saudi Arabia.

Finally, on the southern shores of the Mediterranean, Libya represents the biggest conundrum for European diplomacy and its neighbours. The endemic instability of post-Gaddafi Libya could have a negative impact on countries like Tunisia and Egypt, but could also adversely affect the area of the Sahel. Moreover, it represents a potential threat to the northern shore of the Mediterranean. Again, attempts to reach a non-inclusive peace without the engagement of all the actors involved could only trigger new spirals of violence. On the contrary, what is needed is a long and laborious diplomatic effort aimed at facilitating an agreement between the parties that would satisfy both and bring stability in North Africa.

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IT IS NECESSARY TO UNDERSTAND THE NATURE OF  
THOSE CONFLICTS AND THE INTERESTS AT STAKE

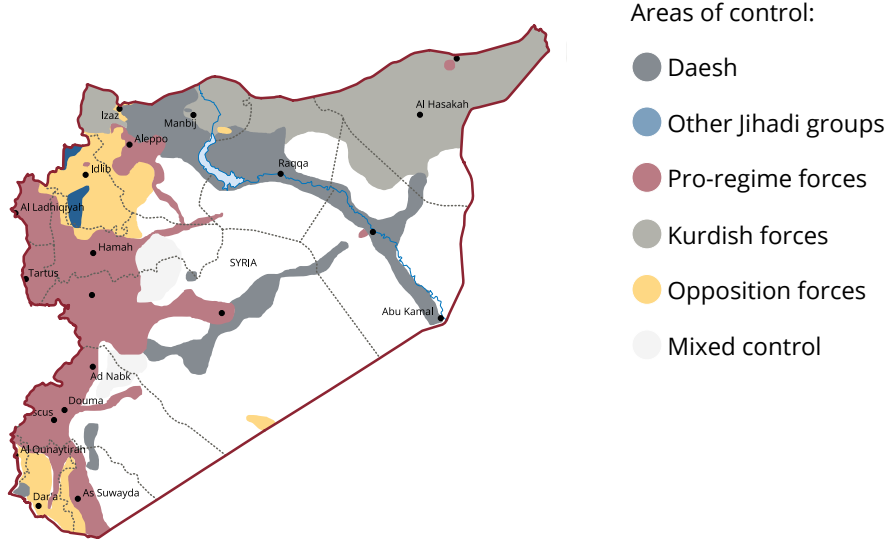
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gradually deteriorated. Bashar al-Assad's regime's determination on the one hand and, on the other, the resistance of the different armed opposition groups have contributed to gradually polarizing the positions on the field. The opening of a third front with the entrance of Daesh in the conflict has further complicated the picture and makes it difficult to find a way towards a solution. From a wider standpoint, the direct intervention of Iran and Russia in support of Assad and that of the US-led international coalition in support of the opposition have actually internationalized the conflict. The death toll exceeds 300,000. About 11 million people



# THE SITUATION ON THE GROUND IN SYRIA

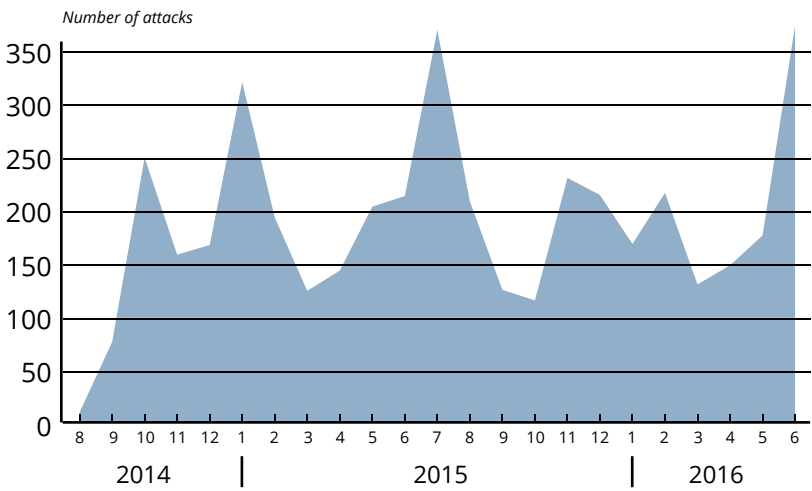
As of October 2016



Year: 2016. Data: Syria Direct; Institute for the Study of War

## AIR STRIKES IN SYRIA

Number of US-led coalition strikes in Syria



Year: 2016. Data: Institute for the Study of War; US Central Command



## NEW IDEAS

## SOME STEPS TO REBUILD PEACE IN SYRIA

**Agnès Favier**

Scientific Consultant on Syria for the Middle East Directions Programme, Robert Schuman Centre for Advanced Studies, European University Institute (EUI)

*Five years of conflict in Syria have deeply fragmented the country and produced divisions along geographical, sectarian, and ethnic lines. A large portion of Syria's urban areas, as well as the country's industrial and agricultural capacities, has been destroyed. The Syrian conflict has seen military intervention by many international and regional actors and the involvement of foreign fighters from Lebanon, Iraq, Afghanistan, China, Chechnya, the Gulf and Europe. Against this backdrop, several steps could be taken to facilitate conflict resolution in Syria.*

*As the US and Russia have failed to find any agreement to curb violence and enforce a ceasefire, the EU and its Member States should play a greater political and diplomatic role at least on two levels:*

- *Strengthen dialogue with Iran and Russia for the following purposes: to impose a no-fly zone in the Aleppo, Damascus, and Latakia governorates; to reach a new international agreement on the cessation of hostilities (CoH) in Syria, with strong monitoring mechanisms; and to provide incentives for all foreign fighters to leave. A new CoH is a pre-condition for any political solution.*
- *Strengthen dialogue with Sunni regional "powers" (the Gulf States, Jordan, North African countries like Tunisia and Morocco), to provide guarantees to Sunni communities in Syria (and elsewhere), and to limit the influence of Jihadist movements.*

*As far as terrorism is concerned, in order to be successful, the fight against Daesh must be comprehensive (both in Iraq and Syria) and should be reinforced by a civilian and military strategy aimed at encouraging native local Arab forces (and not only Kurdish armed forces) to regain control of liberated areas. Other Jihadist groups such as Jabhat Fatah al-Sham (former Jabhat al-Nusra) should also be neutralized by relying on other mainstream Islamist groups.*

*In order to prepare a comprehensive and lasting political solution, a positive agenda might include:*

- *Move the focus of negotiations away from the objective of a centralized power-sharing agreement and towards inclusive negotiations with local leaders and all armed groups (including the regime) on the ground, Kurdish movements, and diaspora leaders. The aim should be to prepare a solution based on political and economic decentralization, including a special status for the Kurds and mechanisms to manage the sectarian diversity.*
- *The security of local actors should be guaranteed, initially by the countries that currently have areas of influence inside Syria (Turkey in the North, Jordan in the South, Russia in the Coastal areas, Iran in Damascus, Qatar in the North West), with UN monitoring.*

# A DRAINED COUNTRY

## The impact of war on Syria



Reduction of overall population size over the last 5 years

– 28%



Reduction in life expectancy over the last 5 years

– 27%



Number of  
refugees

**4.7 million**



Number of internally  
displaced people

**6.6 million**

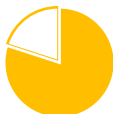


Syrians living  
below the poverty line

**>85%**



Drop in night-time electric-light intensity since  
the start of war



**80%**



Estimated unemployment  
rate



**54%**

Year: 2016. Data: UN; The Economist



NEW IDEAS

## OVERCOMING THE DEADLOCK IN LIBYA



**Arturo Varvelli**

Senior Research Fellow and Head of the Terrorism Program,  
Italian Institute for International Political Studies (ISPI)

*In Libya the intervention of regional powers significantly contributed to the growing polarization between the two fronts. Foreign interference has made it even more difficult to launch a genuine national reconciliation process.*

*At the Vienna Conference (April 2016) it was decided that the international community and the UN Mission would work to include General Khalifa Belqasim Haftar in the structure of the new government while trying to avert the division of the country. The solution to the crisis in Libya can be pursued only through a preliminary agreement among the most influential regional actors based on the application of the concept of "regional ownership".*

*While this possibility may appear remote in the current state of affairs, Europe, the US and the UN should spare no effort to ensure that the Egyptian president Abdel Fattah al-Sisi, Haftar's main supporter, adopts a responsible stance in favor of moderation and mediation.*

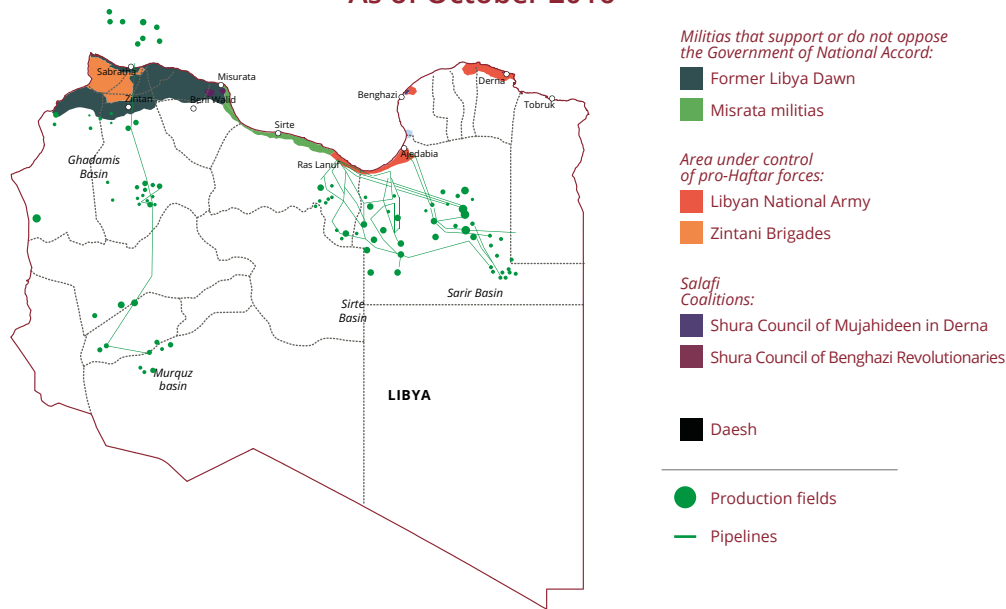
*The recognition of the Egyptian role could contribute to the perception that Cairo's interests are being fulfilled. At the same time, it should be stressed that Haftar will be integrated in the government structure only provided that his ambitions are contained. For example, the legitimacy of the Tobruk parliament should be reconsidered, since according to existing political agreements and to the constitutional declaration it should have been dissolved by now.*

*Mediation could be intensified on the levels of civil society, local representatives, and economic elites; nevertheless new negotiations involving especially key security actors are crucial.*

*In parallel, the international community should strengthen the Presidential Council's capacity to address the economic issues on the table (first of all, the liquidity crisis) and it should be encouraged to adopt a policy to selectively allocate funding to the militias, in an attempt to establish a closer connection between financial support and the internal reintegration of the new national powers.*

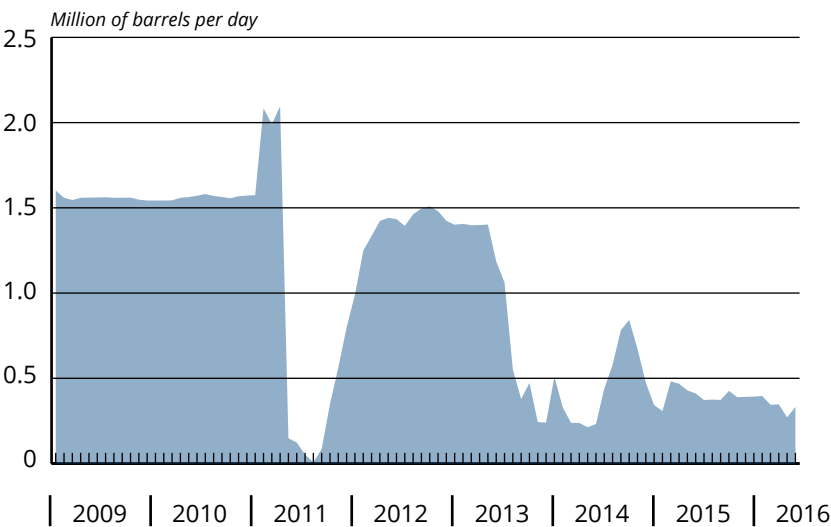
# CRUDE RIVALRY DIVIDES LIBYA

## As of October 2016



Year: 2016. Data: Bloomberg Reporting

# THE COLLAPSE IN OIL PRODUCTION IN LIBYA



Year: 2016. Data: OPEC; JODI-Oil



## NEW IDEAS

## YEMEN: AVOIDING A BREAKUP

**Armando Sanguini**

Former Italian Ambassador to Tunisia and Saudi Arabia,  
Scientific Advisor, Italian Institute for International Political  
Studies (ISPI)

*It is still open to discussion whether the partially successful military takeover by the Houthis was the unavoidable outcome of a long frustrated liberation struggle or an unacceptable aggression against the legitimate government of Mansour Hadi. What is not disputable is the outright condemnation expressed by the International Community (UN Security Council Resolution 2216) and its deep concern for the foreseeable, devastating repercussions of the civil war in a country that is strategically important but also a de-facto failed state and, what is more, one that is challenged by a serious terror threat.*

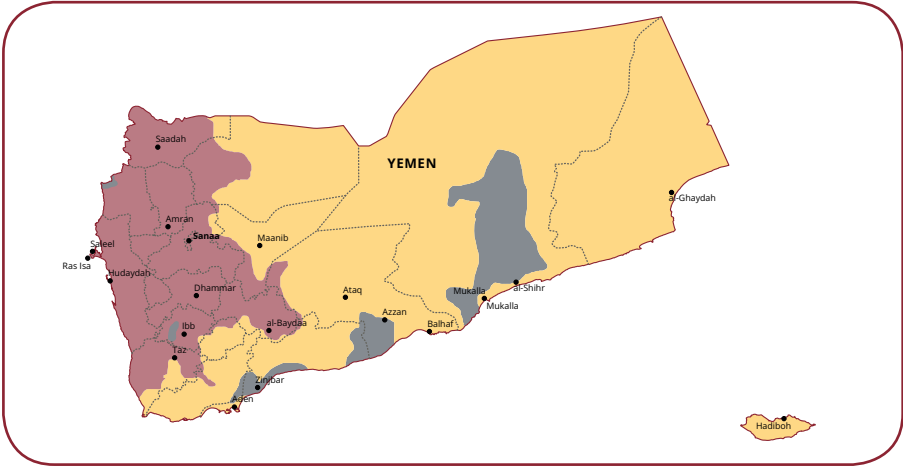
*The politically meaningful Resolution was adopted after – and not before – the launch by the Saudi-led Arab coalition (Egypt, Sudan, Morocco, Jordan, most Gulf monarchies) of the attacks against the Houthis and the allied forces loyal to former President Ali Abdullah Saleh, their enemy for nearly a decade. It was adopted after – and not before – the internationally voiced allegations of an intolerable Iranian complicity in that war, as part and parcel of Tehran's regional destabilization strategy. It was a proxy war that required a timely and resolute response, which took the form of a visible "Sunni" counterstrike, one that was requested – and legitimized – by Mansour Hadi, the elected President.*

*Was it a tantalizing trap or a vital security operation? One year and a half after the first attack, the hope of a blitzkrieg has vanished. It would appear that the Saudi coalition is in fact stuck in a troublesome quagmire. Security and stability threats are still looming large, and death and destruction – more than 6,000 dead, 2.4 million forcibly displaced, 14.4 million people in food insecurity, etc. – are undermining the credibility and legitimacy of the entire operation. The long series of failed mediation efforts have not discouraged the UN Special Envoys – most recently, Ismail Ould Cheikh Ahmed – but it is questionable whether a viable exit strategy should be still based on the tough demands of Resolution 2216 or on a more flexible, more political approach open to a workable power-sharing arrangement. As no one side appears close to a decisive military victory and the Houthis still retain control of a very strategic part of the country it would not be advisable to insist on Hadi's renewed call to the rebels to withdraw from all areas under their control and lay down their arms, as a pre-condition to negotiate. Finding ways and means to open the door to Houthis' basic, longstanding claims could create the best grounds for Saudi Arabia and its allies to reach a sustainable regional security and stability perspective, thus averting the looming specter of a split of the country and granting al-Qaeda and the self-proclaimed Islamic State additional breeding ground.*

# MILITARY SITUATION IN YEMEN

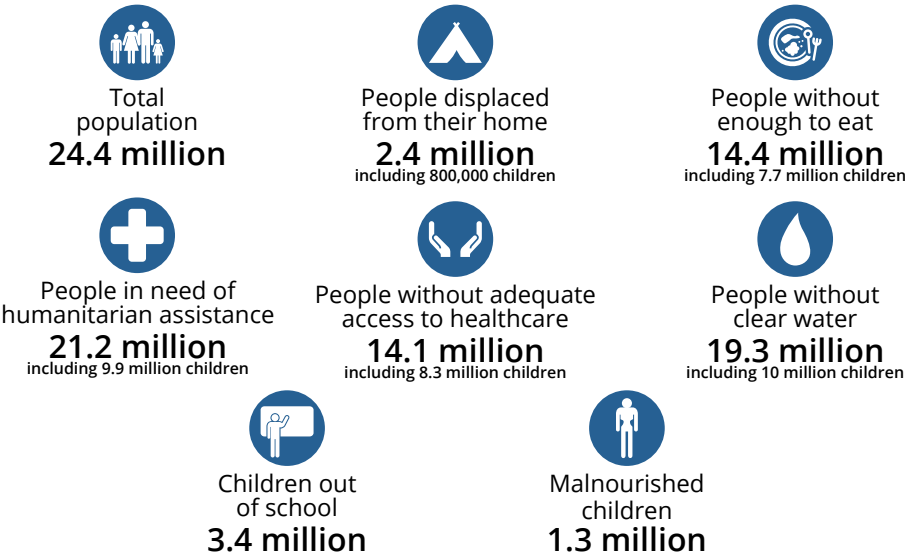
## As of October 2016

- Government, popular resistance committee & tribal allies
- Former government, Houthis militants & tribal allies
- Al-Qaeda & tribal allies



Year: 2016. Data: Risk Intelligence

# THE EFFECTS OF WAR ON YEMEN



Year: 2016. Data: UN OCHA; UNICEF

# DAESH: RESHAPING THE MIDDLE EAST?

**Since its foundation, Daesh has not limited itself to inspiring and sustaining a struggle by vanguards,** but rather it has used violence as a creative tool to control territories, change societies, reshape local balances of power and, finally, influence geopolitics. It is through such understanding that it is possible to recognize how Daesh contributed to reshaping the Middle East and to imagine the region it will leave behind once defeated.

At a micro level, since 2003 Daesh's forerunners proved capable of sweeping into local socio-political cleavages, manipulating and exploiting the weaknesses of the central government, internal divisions and separatist challenges to create the necessary chaos to build upon its "new" order. The sectarian rivalry perfectly met its objective to spoil the future of post-Saddam Iraq. Politically, sectarianism served to re-orient and re-shape alliances and traditional hierarchies, recruiting those who felt isolated, marginalized or excluded. It did so within towns and rural areas, with tribes and highly-skilled Baathist members imposing them as the new source of authority and power. At the social level, religious minority cleansing drastically altered local diversity and plurality, a condition necessary to create its propagandized new and pure society.

At a regional level, since 2011, thanks to the civil war in Syria, Daesh was able to further expand its agenda, which culminated in the historic erasure of the border between Syria and Iraq. Indeed, it is impossible to think about today's Daesh without the Syrian civil war. It was from Raqqa that the organization swept into Mosul, where it self-proclaimed its Caliphate. The clearing of the "lines in the sand" of the Sykes-Picot agreement transformed Daesh from a menace to Iraq into a

regional actor and a geopolitical factor. An increasing number of foreign fighters headed to Syria, partially replacing whoever left the country as a refugee. This served Daesh's purpose of fabricating a "new" society. But, more important, the control of territories across Syria and Iraq allowed the group to blur the borders of conflicts and competitions within the region.

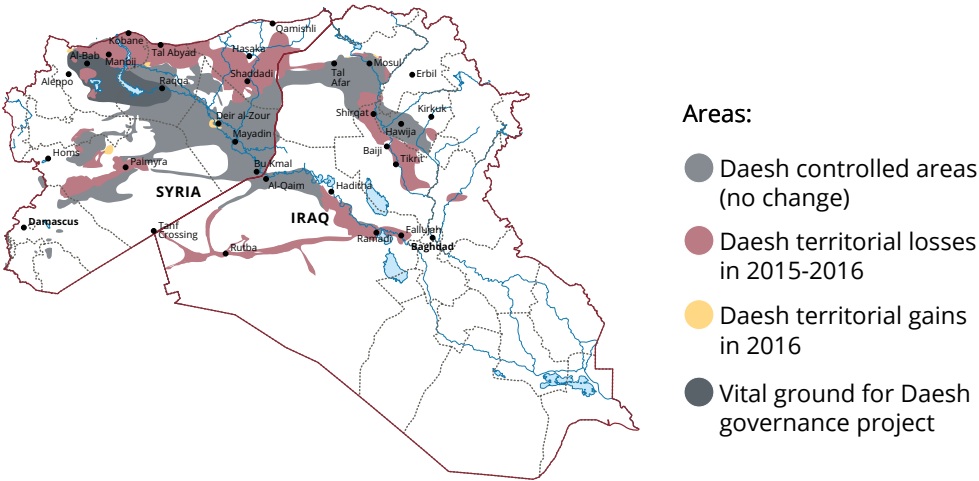
Daesh has been able to enter the regional and international geopolitical competition, indirectly serving competing interests and agendas and becoming one of the pivots in the shifting alliances and rivalries for regional hegemony. This occurred despite the fact that all the regional and international actors recognized Daesh as a substantial threat to their stability and security.

However, it is necessary to acknowledge that what is shattering the Middle East is deeper than Daesh. This organization has contributed to widening already existent socio-political cleavages, mistrust and polarization. Today, the region is less plural and diverse and it is more securitized than it was before. At the same time, the struggle for regional hegemony is still ongoing and continues to represent the major factor of instability. Moreover, after two years of Daesh control, its defeat will create yet again a temporary power vacuum. Recognizing that, historically, Middle Eastern conflicts rarely end with outright victory and permanent stability, the international community needs to be ready to fill this vacuum and to support official institutions and authorities. It needs to engage in the state-building process in the long term, fostering mutual understanding and power sharing, experimenting with new forms of decentralization and, more importantly, working for a permanent agreement among regional and international powers.



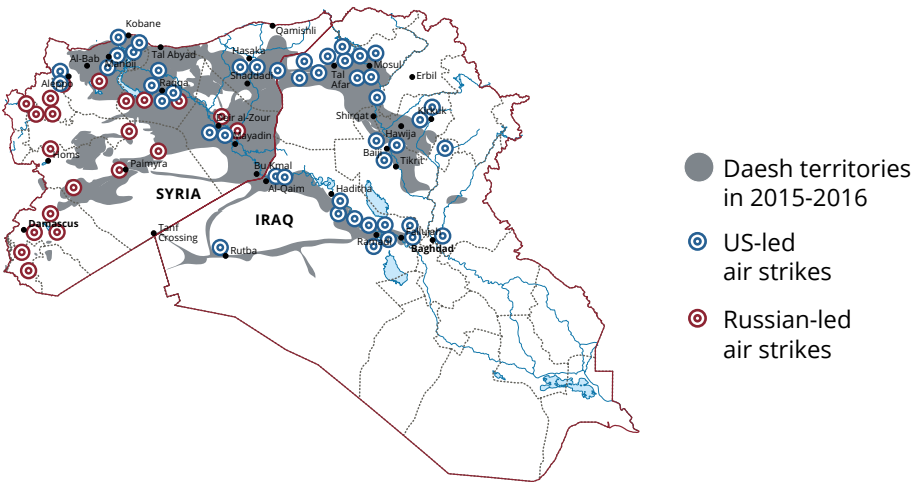
# LOSING GROUND

Daesh territorial losses between January 2015 and November 2016



Year: 2016. Data: HIS Conflict Monitor

## US AND RUSSIAN AIR STRIKES IN SYRIA (2014-2016)



Year: 2016. Data: Institute for the Study of War; US Central Command



NEW IDEAS

# WHY MOSUL MATTERS



**Vali Nasr**

Dean, Paul H. Nitze School of Advanced International Studies,  
Johns Hopkins University

*It is almost certain that Daesh will lose Mosul before long. Daesh exploded on the world stage when it captured Mosul; losing its control will be the beginning of the end for Daesh.*

*This would be an important victory for Iraq and the Western coalition that has supported its effort to win back control over the country's second largest city; to protect the integrity of the Iraqi nation-state, and reassert sovereignty over all of its territory. The fall of Mosul will also serve as a powerful symbolic defeat for Islamic extremism and its self-described caliphate. It was battlefield victory and the claim of a caliphate controlling large parts of Iraq and Syria that fed Daesh's aura of power. After Mosul, that will be no more.*

*Victory in Mosul, however, will not end the cataclysm that is tearing the Middle East apart. Iraq and Syria are suffering from the failure of state institutions that cannot provide tenable and effective governance over their territories. This vacuum of power is stoking civil conflicts between tribes, ethnic groups and religious sects, worried about their future or hoping to gain the upper hand. State failure has opened the door to rebalancing the distribution of power, whereby winners seek to protect their gains and losers seek to reverse their fortunes.*

*The civil conflict is drawing in the region's power brokers - Turkey, Iran and Saudi Arabia - whose national interests are tied to the outcome of the civil conflicts.*

*The defeat of Daesh will not resolve the contestation over power that is driving the civil and regional conflicts raging in the Middle East, but how peace and governance is restored to Mosul could show the region a way out of the impasse it finds itself in.*

*After war must come peace, and peace will be enduring if it is equitable, just and acceptable to all parties. The end game in Mosul can either nudge the Middle East toward peace or further inflame its conflicts. Regional peace could start with peace in Mosul. The international community was not able to give Iraq an enduring political settlement in 2006, after Mosul it has a second chance. Planning for that outcome should start now.*

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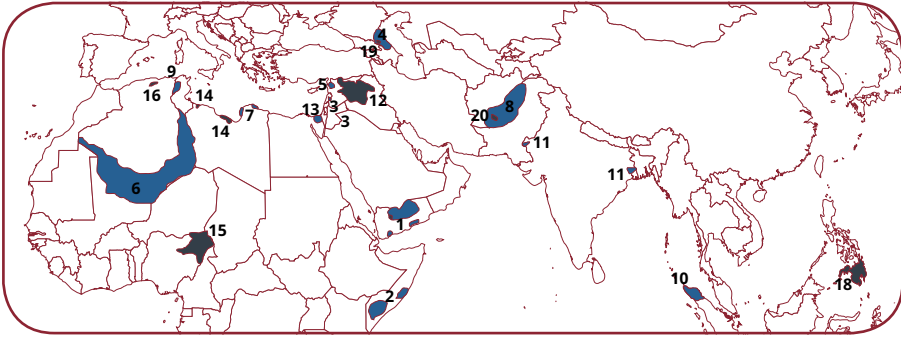
# JIHADIST GROUPS AROUND THE WORLD

## Al-Qaeda Network

1. Al-Qaeda in the Arabian Peninsula (AQAP) / Ansar al-Shari'a (Yemen)
2. Al-Shabaab (Somalia)
3. Abd Allah 'Azzam Brigades (Lebanon)
4. Islamic Emirate of Caucasus (Russia)
5. Jabhat Fatah al-Sham (former Jabhat al-Nusra, Syria)
6. Al-Qaeda in the Islamic Maghreb (AQIM) and allies: Muajo, Mourabitoun (Algeria, Mali, Tunisia, Niger)
7. Ansar al-Shari'a (Libya)
8. Tehrik-i-Taliban / Al-Qaida Khurasan (Pakistan, Afghanistan)
9. Katibat 'Uqba ibn Nafi (Tunisia)
10. Jemaah Islamiyah (Indonesia)
11. Al-Qaeda in the Indian Subcontinent (AQIS, India)

## Daesh-linked groups

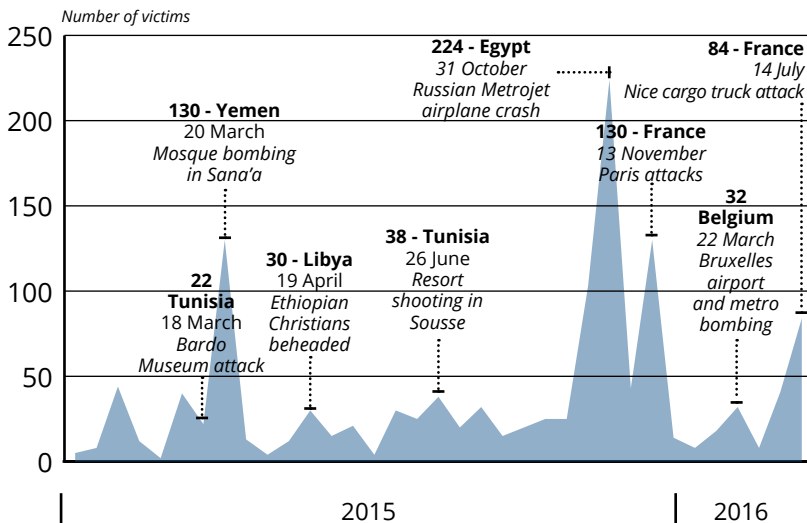
12. Organization of the Islamic State (Daesh, Syria, Iraq)
  13. Ansar Bayt al-Maqdis – Wilayat Sina' (Egypt)
  14. Islamic State of Libya – Wilayat al-Barqa, Wilayat al-Tarabulus (Libya)
  15. Boko Haram – Wilayat al-Sudan al-Gharb (Nigeria, Chad, Cameroon)
  16. Jund al-Khalifa – Wilayat al-Jazair (Algeria, Tunisia)
  17. Islamic State of Yemen – Wilayat al-Yemen (Yemen)
  18. Abu Sayyaf Group (Philippines)\*
  19. Islamic State of Caucasus – Wilayat Kavkaz (Russia)
  20. Islamic State of Khorasan (Afghanistan, Pakistan)
- \* *Oath of allegiance (bay'ah) not accepted yet*



Year: 2016. Data: Jihadology (Aaron Zelin)

## WHEN DAESH STRIKES

### Daesh major attacks in Europe and MENA region



Year: 2015-2016. Data: The New York Times

# UNDERSTANDING RADICALIZATION: DAESH AS A MAGNET?

**A**lthough radicalization has been a well-established topic among a number of analysts and in research in different area studies for quite some time, it is only recently that this term has entered daily vocabulary and become a complementary word to refer to today's jihadism. The reasons for this increasing concern with the issue of radicalization most probably lie in the fast growth of two different phenomena: the so-called "lone wolves" and the substantial wave of foreign fighters. Two phenomena that have become particularly worrisome, nurtured by the tumultuous geopolitical situation in the wider Mediterranean basin, but also two dynamics that can explain some important features of today's jihadism along the continuum between al-Qaeda and Daesh. In 2010 CIA Director Leon Panetta defined lone wolves' attacks as "the main threat to" the USA. These attacks have since taken

ty to attract and draw in individuals from all over the world. Estimates show the number of foreign fighters who joined Daesh since the beginning of the Syrian civil war to be between 31,000 and 38,000, representing nearly 120 different countries around the world. The foreign-fighter phenomenon is not new in history. Nevertheless, today's dynamic is particularly worrisome. Although it is estimated that roughly half are dead, the number of returnees or people that have moved to another territory is already sizable (over 300 in the UK, 270 in Germany and 250 in France, just to mention some cases). This situation inevitably translates into an increased threat and perception of insecurity.

It is challenging to draw an exact profile of radicalized individuals. Case studies show that there are no single causes for or pathways into radicalism and violent extremism, but a mixture of pull and push factors. The only thing that seems to characterize this recent wave of radicalization across the board is the age factor, since most are young people under 35 years. Magnus Ranstorp describes this mixture with the image of the kaleidoscope and it is precisely the ability to play with its different grains, colors and shades that has determined the success of Daesh in recent years. Daesh's message coalesces the local and universal dimensions, using the context to explain and experiment its worldwide ideology and prove the validity of its message. The very existence of a clearly identifiable "state" with its own borders has given Daesh a strong power of attraction, a focal point for a wide array of different individuals who have turned to it as a source of inspiration or a credible destination in which to live, militate and fight as "born-again" citizens of Daesh's totally alternative socio-political project.

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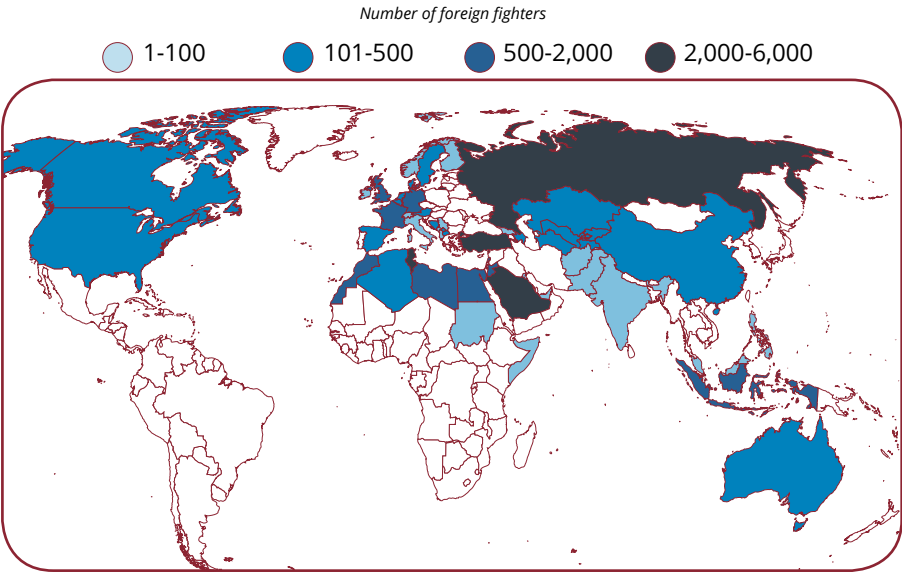
## CASE STUDIES SHOW THAT THERE ARE NO SINGLE CAUSES FOR OR PATHWAYS INTO RADICALISM

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place in a variety of countries both in the West and in the Mediterranean area. While al-Qaeda, and in particular its Gulf Peninsula branch, was initially considered the main instigator behind most of these attacks over the last ten years, more recently Daesh has also increasingly called for lone-wolf attacks. At the same time, taking advantage of a crisis in security services, governments' failures and the persistence of violence in Iraq, Libya and Syria, radical groups have seized on a strategic boost to develop their agendas. Daesh proved particularly skillful in manipulating these weaknesses and imposed itself as a real magnet for the multifarious galaxy of militants and sympathizers with today's jihadist ideology, standing out for its capaci-

# THE GLOBAL DAESH CALL

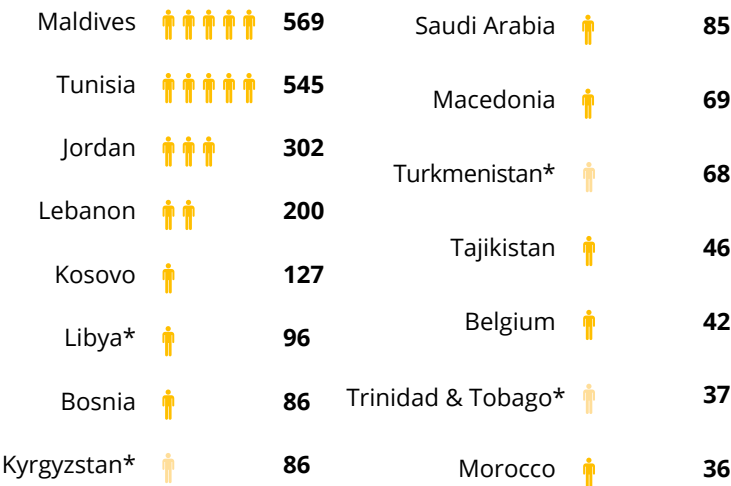
## Origin of foreign fighters



Year: 2016. Data: Soufan Group

# RADICALIZATION HOTBEDS

First 15 countries by foreign fighters per million people



\*Non official data

Year: 2016. Data: ISPI Elaboration on Soufan Group Data



## NEW IDEAS

# WHY DAESH FASCINATES THE YOUTH



**Olivier Roy**

Professor at the Robert Schuman Centre for Advanced Studies and Scientific Advisor of the Middle East Directions Programme, European University Institute (EUI)

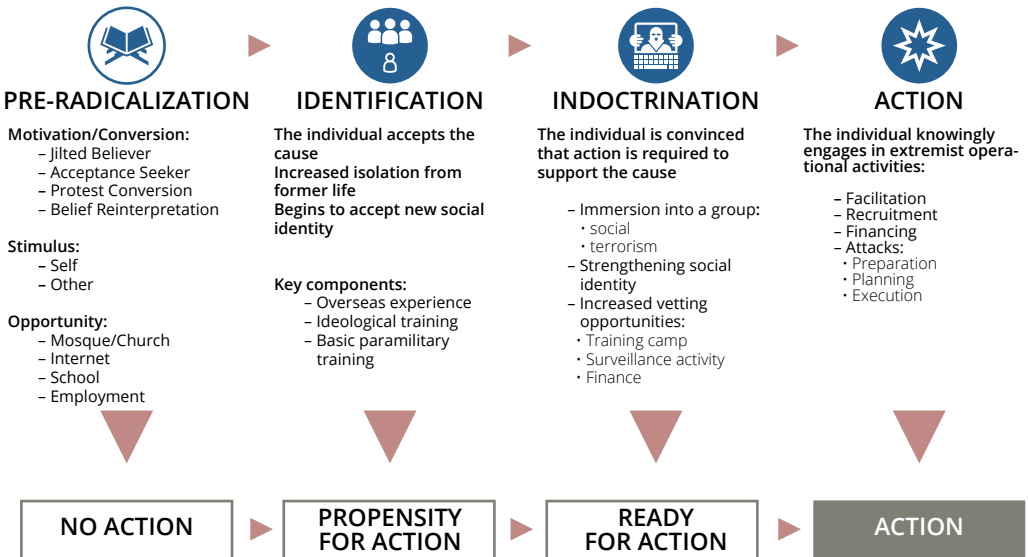
*If we consider the trajectories of its militants, it is clear that joining Daesh is not just a direct consequence of a radicalization process of young Muslim migrants. Mosques are not the place of recruitment, as shown by the fact that most of the “nominal” Muslims who join are born-again, and that a growing proportion are converts (around 30 percent in France and the USA, slightly less in Germany, Holland and Denmark), women and minors. The fascination for Daesh comes from its narrative of heroism, revenge, glory and death, constructed by using contemporary technics (videogames) and an aesthetic of violence and death that is pervasive in the modern youth culture. This narrative is then recast into a traditional Islamic imaginary (Jihad, caliphate, martyrdom).*

*To debunk Daesh’s narrative, we should first deprive these young Muslims of the de facto monopoly they claim to have on Islam and, second, we should address the “malaise” of the youth. A few suggestions would be:*

- *To allow the development of Islam as a normal and “visible” religion in Europe. This is key if we want to avoid pushing Islam to the margins, where it could be manipulated by the radicals;*
- *To develop a European Islam, intended not as a “liberal” theology, but rather as one that is connected with Europe’s history and culture;*
- *To stop searching for a “good” foreign Islam (Turkey, Morocco or Egypt) that could be used to fight a “bad” foreign Islam. It should be acknowledged that Islam is not solely a Middle Eastern issue;*
- *To develop a subtler approach towards Daesh “returnees”. Joining Daesh should not be just a one-way trip ending in death. While the threat posed by some has to be addressed, others may have a story to tell that can help to reduce the attractiveness of Daesh;*
- *More broadly, to address the issue of the youth’s disenchantment towards politics.*

# THE RELIGIOUS RADICALIZATION PROCESS

## From conversion to terrorism: a model of individual pattern



Year: 2016. Data: FBI

# THE EUROPEAN FOREIGN FIGHTERS

## Sociological aspects of a domestic phenomenon



Total European foreign fighters:  
**3,922-4,294**

Returned:  
**30%**

Confirmed dead:  
**14%**



Gender:  
**17%**  
of European foreign fighters are female



Residence:  
**90-100%**  
of European foreign fighters come from urban or build-up areas



Converts:  
**6-23%**  
of European foreign fighters are converts

Year: 2016. Data: ICCT

# THE ARMS RACE IN THE MENA REGION

**In recent years, arms transfers to the Middle Eastern region have witnessed the most impressive growth in the world, reflecting the mounting instability of the area.** Between 2011 and 2015, arms imports in the MENA region have indeed increased by 61 percent if compared to the years 2006-10. In the same period, in Asia too there was an increase, but only by 26 percent, while in Europe arms imports decreased. The data on military expenditure on GDP show that as many as 7 countries among the top ten in the world belong to the MENA region: Oman, Saudi Arabia, Libya, Iraq, Algeria, United Arab Emirates, and Israel. Although the latter is also the only country in the region equipped with nuclear weapons for the time being, many fear that in the short to medium term the Gulf powers could take the path of nuclear development too. The inherent danger of this situation is further aggravated by the

chased 24 combat helicopters, nine air defense systems and 3 airborne early warning aircraft from the USA, 24 combat aircraft from France and 52 tanks from Germany. By the same token, Saudi Arabia has signed contracts for more than US\$ 30 billion for the purchase of 150 combat aircraft and thousands of air-to-surface and anti-tank missiles. Other countries are also focusing their interests on the enlargement of their fleets and the purchase of submarines: Turkey and Egypt especially from Germany, and Algeria from Russia.

Besides the Gulf monarchies, Iraq deserves special attention as a country that has almost doubled its arms imports over the past five years. In order to meet the security challenges posed by the emergence of Daesh, Baghdad needs to modernize its army and is focusing on the development of its airpower as well as on the purchase of armored vehicles from Russia and the United States. The latter is the first supplier of weapons to Middle Eastern countries (53 percent of total imports of the region), followed by the UK (9.6 percent) and Russia (8.2 percent). Moreover, Washington has a global military aid program that focuses specifically on its Middle Eastern partners, above all Israel, Egypt, and Jordan.

In light of the present trend, concerns are on the rise. The civil conflicts in countries such as Libya and Syria, the Saudi-led intervention in Yemen, the militarization of regimes like Egypt, the fight against jihadist terrorism and the competition between Iran and the Arab Gulf states all contribute to intensifying the arms race in the region. For the time being these issues remain open and seem to indicate that in the years to come the trend will not reverse, but will rather continue to gain momentum.

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## BETWEEN 2011 AND 2015, ARMS IMPORTS IN THE MENA REGION HAVE INCREASED BY 61 PERCENT

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fact that Saudi Arabia resents the Iranian nuclear program.

According to the Stockholm International Peace Research Institute (SIPRI), Saudi Arabia, the UAE and Turkey are the three largest arms importers in the Middle East in absolute terms, with Saudi Arabia accounting for more than a quarter of all imports of weapons in the region over the past five years, with an increase of 275 percent. But in the past five years the widest percentage increase concerned expenditure in Qatar (+279 percent over the 2006-10 period). This figure confirms the Gulf's weight in the balance of the arms race in the Middle East. In particular, during the last years Qatar pur-



# INTERNATIONAL ARMS TRADE

● Export  
(% of global exports)




















● Import  
(% of global imports)



Year: 2015. Data: SIPRI

## US MILITARY AID









































### First 10 recipients worldwide

US aid (million of dollars)		
Israel	     	3,100
Egypt	    	1,300
Jordan		300
Iraq		250
Pakistan		280
Lebanon		80
Philippines		40
Colombia		25
Tunisia		25
Yemen		25

Year: 2015. Data: US Department of State

## THE ARMS RACE

### First ten MENA countries

Military expenditures (% of GDP)		
Oman	       	14.7
Saudi Arabia	       	13.5
Libya	   	8.0
Iraq	   	7.8
Algeria	  	6.2
UAE	  	5.7
Israel	  	5.4
Lebanon	  	4.8
Yemen	 	4.6
Bahrain	 	4.4

Year: 2015. Data: SIPRI

# SHARED PROSPERITY





# 2

## SHARED PROSPERITY

- 30 Euro-Med Economic Cooperation: Building New Bridges
  - 34 Fostering Inclusive Economic Growth
  - 38 Market Liberalization: Still Underway?
  - 40 Increasing Investment for Development
  - 44 Going Digital: Dream or Reality?
  - 46 The Energy Puzzle: Towards Sustainable Security
  - 52 Mediterranean Connections: A Global Maritime Hub
  - 54 Blooming the Desert: How to Cope with Water Scarcity?
  - 56 Betting on Education: An Asset for the Future
-

# EURO-MED ECONOMIC COOPERATION: BUILDING NEW BRIDGES

**O**ver the last two decades Euro-Med relations have intensified significantly. Although the so-called Barcelona Process launched in 1995 was far from achieving all its ambitious aims – among which the creation of a Mediterranean Free Trade Area by 2010 – north-south Mediterranean trade flows increased substantially and the European Union (EU) became the first trade partner in almost every sector of the majority of Southern neighbors. This was achieved through bilateral economic agreements between the EU and the Southern Mediterranean countries in the framework of the Euro Mediterranean Partnership (EMP) – Association Agreements – and later of the European Neighborhood Policy (ENP). Among the biggest economies of the Southern Mediterranean, the EU represents today 64 percent of the total trade flows in Tunisia, 56 percent in Morocco, and 55 percent in Algeria and 31 percent in Egypt.

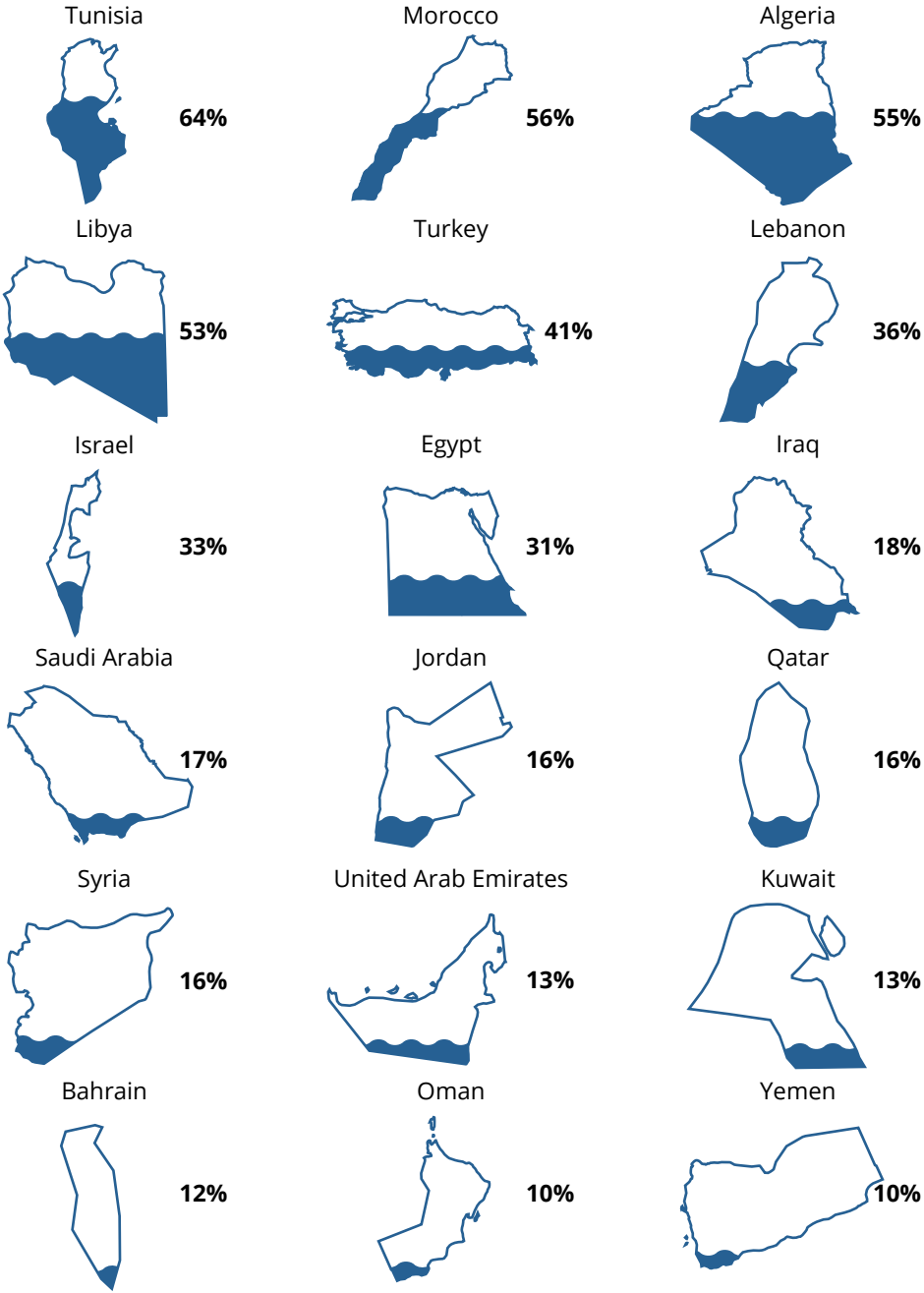
However, economic relations experienced a discontinuous evolution, with countries such as Morocco and Tunisia that gained an advanced status within the ENP and countries such as Syria that, before the current civil conflict, was still in the negotiation phase of the Association Agreement. Furthermore, the focus on north-south bilateral agreements contributed to overlooking the south-south integration despite its inclusion among the objectives of the EMP. In fact, while north-south trade relations witnessed a dramatic increase reaching 318 billion euros in 2015 (it was 220 billion euros in 2005), south-south trade relations stagnated along the same period, with approximately only 10 percent of the total trade occurring between Southern Mediterranean economies. Finally, the mismanagement of the economic changes brought about by market openness

led several economic sectors to suffer from the competition of EU products often causing unemployment and social malaise.

After the 2011 uprisings that dramatically shook the institutional structures of several Southern Mediterranean countries, the EU has tried to improve its political and economic approach taking into account the delicate period which many of these economies were going through. The new approach includes an increased attention toward institution building and the support of small and micro enterprises and start-ups in order to improve the business environment and the employment-creation capacity of the Southern Mediterranean economies. The EU has inaugurated incentive-based “umbrella programs” within the framework of the European Neighborhood Instrument (ENI) which provides additional financial support through EU Financial Institutions to the countries that undertake significant steps ahead in the implementation of sustainable democracy and economic reforms. The European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD) are involved in these efforts with programs aimed at developing local infrastructures and expanding and supporting the private sector, in particular local SMEs. Tunisia, which after the 2011 revolution successfully undertook a transition towards a full-fledged democratic system, has been the main beneficiary of the new program with 3.5 billion euros allocated since 2011. However, in spite of this new approach and additional financial incentives, important steps still need to be carried out, especially in terms of inclusive and fair economic development and institution building, in order to achieve a far-reaching and efficient north-south and south-south economic cooperation.

# TRADING ACROSS THE SEA

Trade with the EU as a percentage of total national trade





## FINANCE, BUSINESS ENVIRONMENT AND EIB IN THE MENA REGION



**Debora Revoltella**

Director, Economics Department,  
European Investment Bank (EIB)



**Frank Betz**

Economist, Economics Department,  
European Investment Bank (EIB)

*In 2013 and 2014 the European Bank for Reconstruction and Development (EBRD), the European Investment Bank (EIB), and the World Bank Group (WBG) jointly financed and implemented the MENA Enterprise Survey (MENA ES). The MENA ES provides representative samples of the formal private sector in eight middle-income economies in the region: Djibouti, the Arab Republic of Egypt, Jordan, Lebanon, Morocco, Tunisia, the West Bank and Gaza, and the Republic of Yemen. The main results of the survey have been published in a report produced jointly by the three IFIs.<sup>1</sup> The report focuses on the quality of the business environment, access to finance, jobs and skills, and firms' competitiveness.*

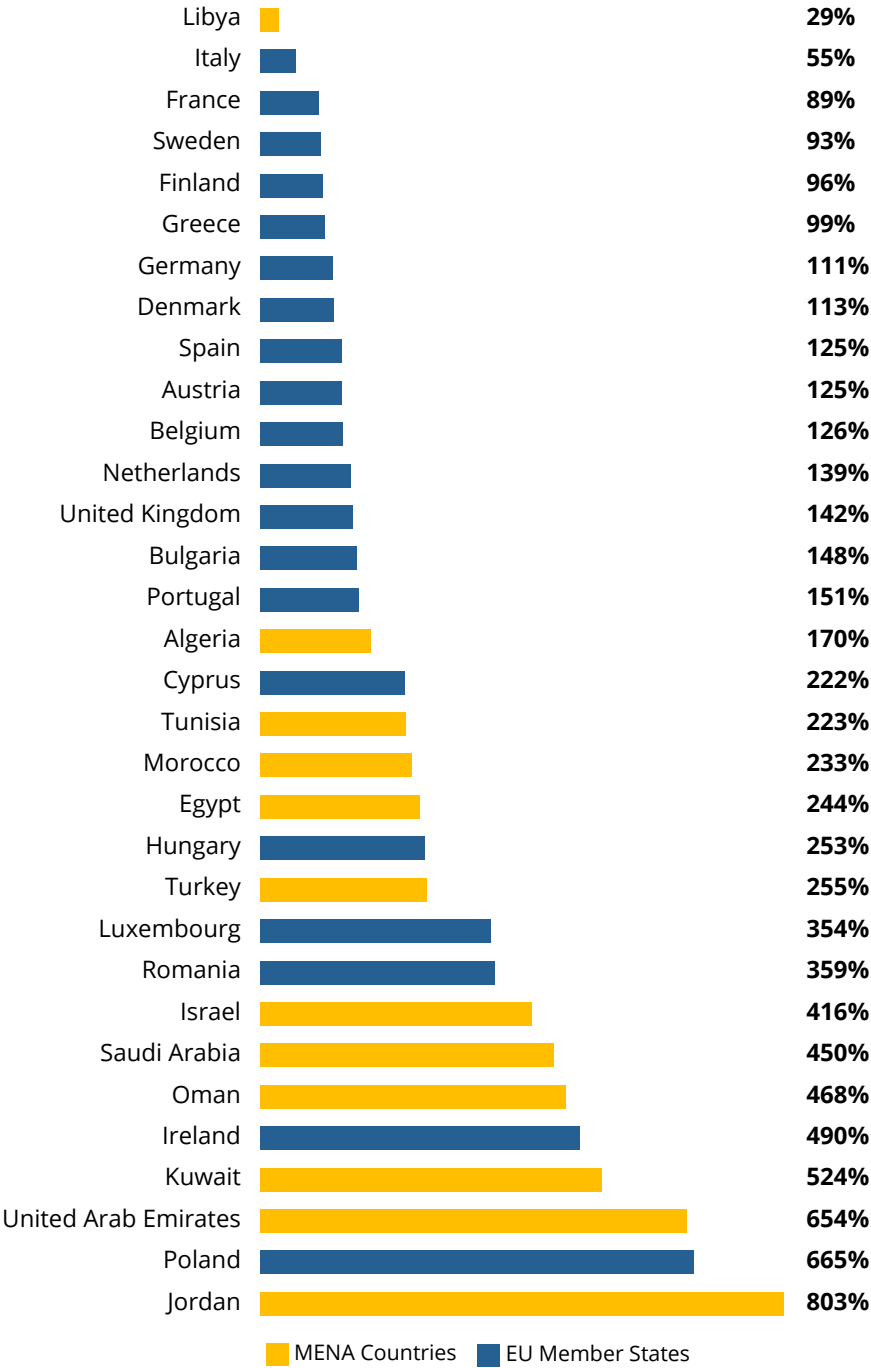
*With the attention of policy makers focused elsewhere, many economies in the MENA region have slipped in business environment rankings. According to the MENA ES, four aspects of the business environment are particularly concerning for entrepreneurs: political instability, corruption, unreliable electricity supply, and inadequate access to finance.*

*Banking sectors in the region differ considerably in their ability to provide access to finance for a broad cross-section of firms. While in Lebanon, Morocco and Tunisia firms make ample use of banks to finance working capital and investments, this does not apply to the same extent to the other MENA ES economies. Measures of credit constraints provide a way to assess whether the supply of credit is able to meet demand. Firms are considered credit constrained if they either have their loan application rejected or are discouraged from applying in the first place. While the share of credit constrained firms in the population is low compared to peer economies, this reflects weak demand for loans rather than ample supply of credit. The high share of firms that do not have a checking or savings account suggests that the disconnect between firms and banks is not just cyclical but also has a structural component.*

*In the Southern Neighborhood the European Investment Bank adopts a three-pillar strategy to provide and attract funding for long-term growth: lending, blending, and advising. On the lending side, the Bank provides loans that cover up to 50 percent of project costs. Besides lending, EIB seeks complementary grant funding by blending its loans with support from the EU funded Neighbourhood Investment Facility (NIF). The Bank's advisory services support the implementation but also allows for upstream technical assistance. Total signatures from 2011 to 2016 amount to €6.34bn. Key sectors include energy, transport, water and wastewater infrastructure as well as SME support. Main beneficiary countries in recent years have been Morocco, Egypt, and Tunisia.*

# STAIRWAY TO GROWTH

## GDP growth between 1990 and 2015



# FOSTERING INCLUSIVE ECONOMIC GROWTH

**D**uring the first decade of this century, the MENA region has experienced economic growth and increasing investment, as a consequence of the oil-price boom and the open-market reforms undertaken by several Southern Mediterranean governments. In this period, most MENA countries enjoyed average annual real GDP growth rates of 4-5 percent, and Egypt performed even better averaging 6.2 percent in 2006-2010. Additionally, the region as a whole witnessed improvements in life expectancy and educational and health indicators as well as a decline in infant mortality rates.

However, in many instances growth did not translate into a reduction of poverty and inequalities. Local autocratic regimes often lacked the solidity to guarantee the degree of accountability and transparency necessary for a balanced and harmonized management of the economic transactions underpinned by the new investment and trade opportunities. Institutional deficiencies and economic mismanagement created three main areas of imbalances that fostered social malaise and protests in several countries, namely:

- Crony capitalism: open-market economic reforms required the regimes to privatize significant shares of the national economies previously under the control of the state and utilized for decades to build social support through clientelism and job over-creation. In order to carry out the required privatizations while at the same time maintaining control over most of the economy, local autocrats resorted to a system of crony relations with business figures intimately connected with their regimes – often even through family ties – who were put in charge of large sections of the economy through piloted privatizations. This new elite empowered with non-accountable control on the main economic activities managed in most cases to divert most of the

profits generated by the new open-economy reforms to their own benefit.

- Geographical imbalances: Local regimes often preferred to direct new investments toward urban areas and regions inhabited by social groups that make up their consensus base. In several countries – most notably Tunisia, Syria, and Egypt – this translated into a widespread neglect of vast areas, such as Tunisia's southern and inner regions or Egypt's Said, that later became a hotbed of social protests.

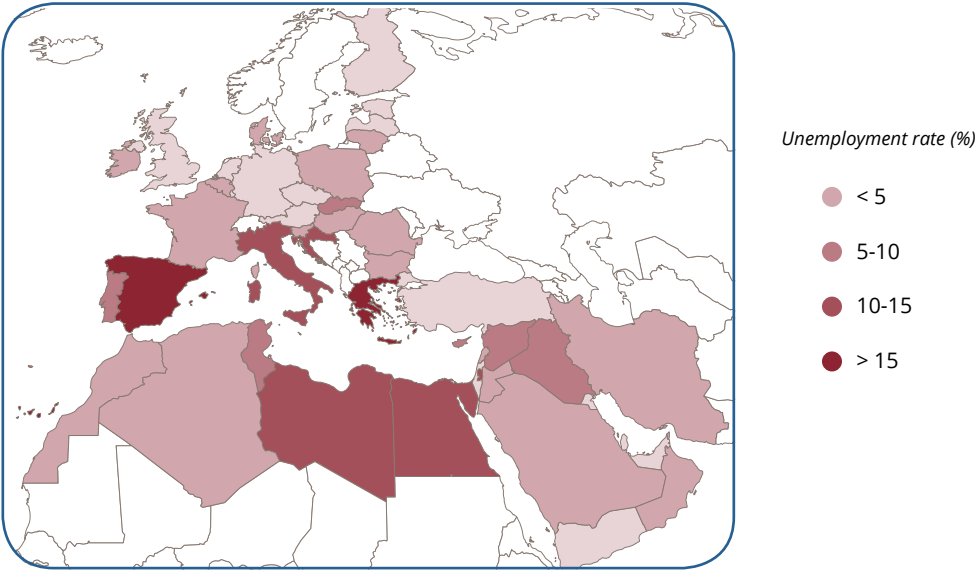
- Propensity for non-labor-intensive investment: The concentration of the economy in the hands of a small crony elite and the institutional difficulties to set up efficient fiscal and bank systems able to support labor-intensive SMEs and start-ups led to the concentration of new investments and economic plans into mega-projects and mostly capital-intensive economic sectors such as oil and gas, telecommunications, and retail. These sectors should foster economic growth, but have proven dramatically inadequate to create the necessary amount of new jobs, especially in societies characterized by a very young population and growing numbers of individuals entering the job market every year.

Increasing social imbalances and skyrocketing youth unemployment are considered the main socio-economic factors that spurred the 2011 wave of uprisings. After 2011, the need to generate more inclusive economic growth became the main focus of cooperation between the countries of the Southern shore, their economic partners, and the international institutions. In particular, the European Union has devoted its new economic cooperation plans with its Southern neighbors to encouraging more inclusive economic growth through direct support to professional education and the development of local SMEs and start-ups.



# A COMMON CHALLENGE

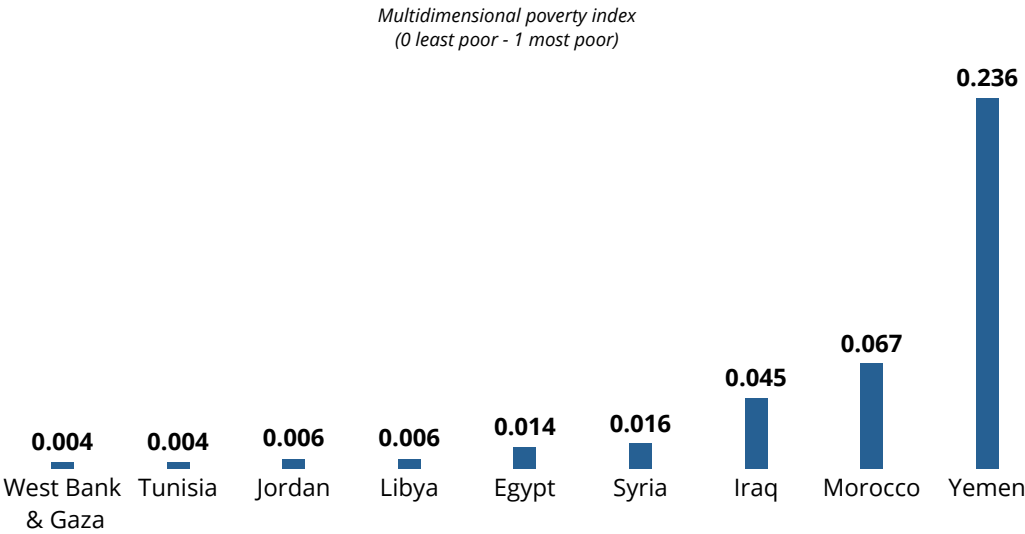
## Unemployment rates in the EU and MENA region



Year: 2016. Data: World Bank

# THE PICTURE OF POVERTY

## Poverty in selected countries



Year: 2016. Data: Oxford Poverty and Human Development Index



## THE MEDITERRANEAN RIM: LOOKING FOR A GROWTH ENGINE\*



**Mina Toksoz**

Associate Fellow, International Economics, Chatham House

*The wave of global integration in the past decade mostly passed by the Mediterranean rim, leaving it fragmented with the national economies on its shores looking elsewhere for growth. Since the southern enlargement of the EEC in the 1980s, the EU single market in the 1990s and the eastern enlargement in the 2000s, northern-Med economies have increasingly turned northwards and inwards to the EU single market. This created problems for the excluded periphery, stunting bilateral relations across the shores of the Mediterranean Sea.*

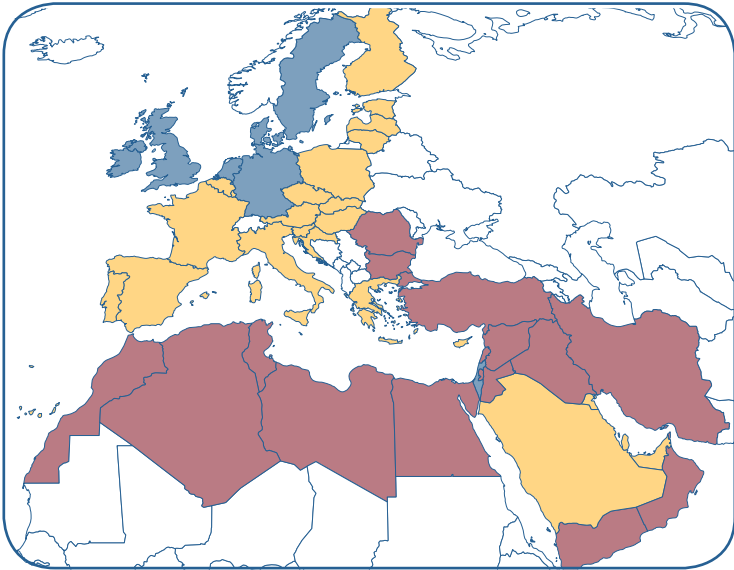
*While the EU turned inwards, the economies on southern shores of the Mediterranean looked to the rapidly growing Gulf and Asia. However, the social benefits of a decade of growth in the 2000s remained limited due to oligopolistic economic structures that had to be supported by expanding public sectors and debt. The regime changes in Egypt and Tunisia only chipped away at structures that hamper competition in the domestic market, foster corruption and keep unemployment and social conflict high. These issues are echoed in the southern EU economies, where the bursting of the credit bonanza, above all for Greece, has left behind stagnant growth and high indebtedness and unemployment. Structural reforms are struggling to reduce the hold of patronage-relations, barriers to competition in services, and lack of transparency and corruption in finance and local authorities.<sup>2</sup>*

*Existing trade clusters in the Mediterranean rim suggest that a focus on sub-regional cooperation has the potential to provide new regional growth engines assuming there is further progress on structural reforms. This should be combined with investment to support logistics infrastructure in coastal growth centers. In line with this, the EU should focus its Mediterranean policies to reinforce potential national growth engines and support coastal centers of logistics and trade rather than general all-encompassing policies with dispersed impact. The EU also needs to continue to address the negative repercussions of the agglomeration effect of the EU single market on its periphery and support a more active diplomacy to reduce regional conflicts.*

*\*This essay focuses on the non-oil economies in the Mediterranean rim and also excludes for now Libya and Syria.*

# THE PICTURE OF DEVELOPMENT

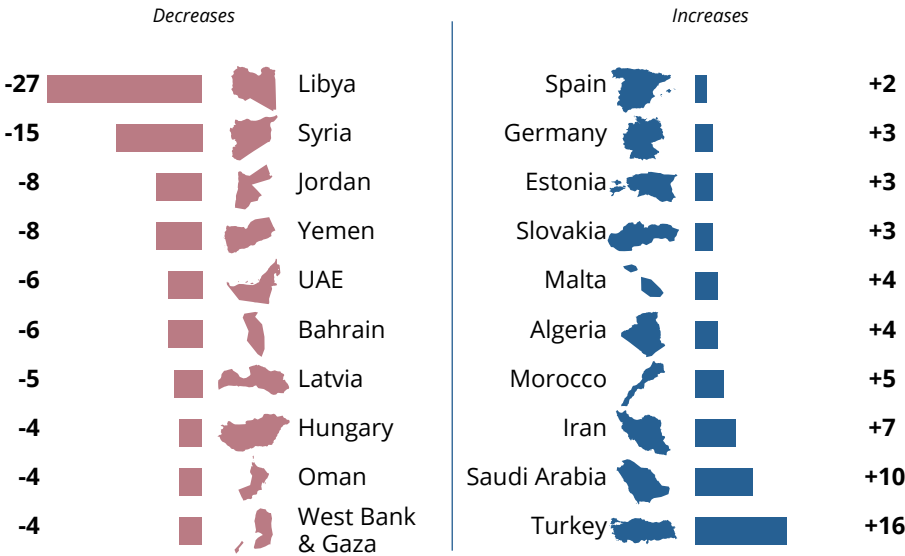
## Human Development Index



Year: 2016. Data: UNDP

# PROGRESS AND SETBACKS

## Change in HDI rank (2009 - 2014)



Year: 2016. Data: UNDP

# MARKET LIBERALIZATION: STILL UNDERWAY?

## **M**arket reforms have been a core element of the development agenda in

the MENA region since the 80s when the IMF- and World Bank-supported economic reform programs were first implemented to handle the severe macroeconomic crisis that the countries of the region were facing. These reforms included the reduction of the size of the public sector through privatization, the lifting of regulation on investment and capital flows, as well as the removal on a number of tariffs on imports and price controls to be replaced with market-based pricing schemes. Social unrest sparked by grievances over escalating prices and rising unemployment dissuaded MENA governments and autocrats from engaging in further reforms, resisting attempts by international organizations to deepen market liberalization, especially as regards price distortions and the possibility of subsidy elimination.

The Arab Spring and the transitional processes it prompted brought the question of market reforms back to the limelight. Lack of market freedom was deemed among the main causes of the widespread social discontent and frustration. Crony capitalism practices, corruption, and overregulated economic systems were pinpointed as binding constraints for private sector development and, consequently, for inclusive and sustained growth.

Since 2011, huge resources have been deployed for development aid programs in the MENA region. The first relevant initiative was the Deauville Partnership - launched in May 2011 by the G8 countries, the EU, the main multilateral development banks, the GCC countries, Turkey and some MENA countries - which aimed at mobilising financial resources for a wide range of initiatives to enhance economic governance and strengthen competitiveness in the region. Market reforms and liberalization became, once again, a cornerstone for the achievement of these goals and both international donors and

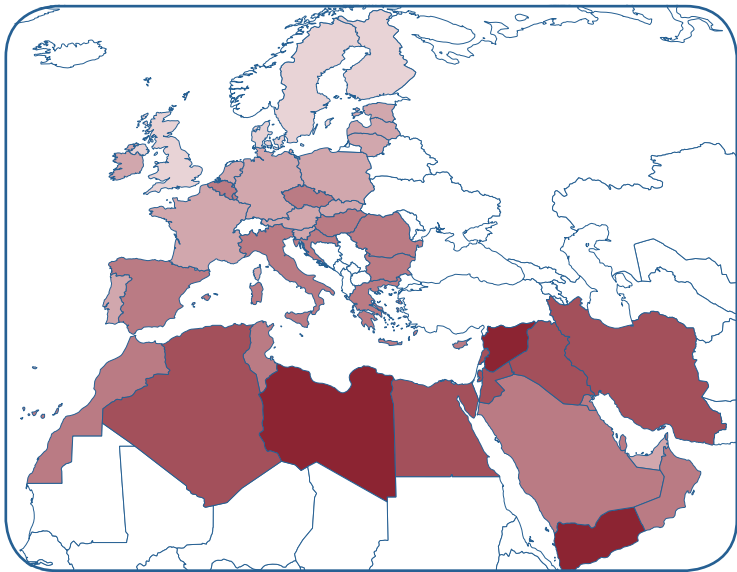
the new governments in the region committed to a large-scale reform process to improve the business environment in order to encourage private sector participation and attract foreign investors.

More than five years after the Arab Spring, there is still a long way ahead. Most of the MENA region countries have lost several positions in the Ease of Doing Business ranking between 2011 and 2016, with the only exceptions of Tunisia (stable in 74th position) and Morocco, which climbed more than 50 places in 5 years. The uncertainties of a bumpy transition process challenged by terrorism-related security issues have slowed down the introduction of structural reforms, but the engagement of the leaders and officers currently in power to stabilise the economy and promote investment remains unchanged. While Morocco pursues investment policy reforms to attract foreign direct investments - also leveraging on its higher political stability compared to the rest of the region - the new Tunisian government is working on a new investment code and measures to fight corruption and improve governance and transparency. Egypt and Jordan have been in constant dialogue with international organizations about economic and financial reform programs for fiscal consolidation and a better business climate. Following the oil price drop, Algeria has recently announced its intention to borrow from international organizations after more than ten years, which will likely lead to negotiations on market and investment regulation reforms.

Such efforts must be thoroughly supported by the international community, in order to unleash the full potential of the MENA economies and pave the way for more sustained and inclusive growth. The lesson of the 80s shall not be forgotten, bearing in mind the importance of a public sector strongly committed to its development goals that complements market reforms prioritising social exclusion and poverty.

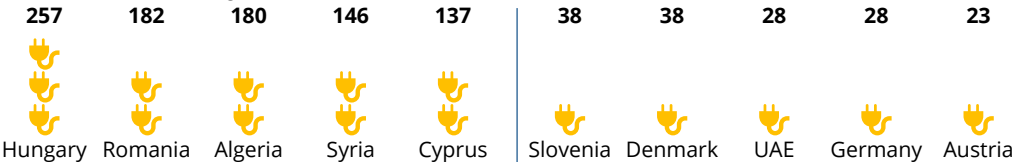
# BUSINESS: UNLEASHING THE FULL POTENTIAL

## Ease of Doing Business Index



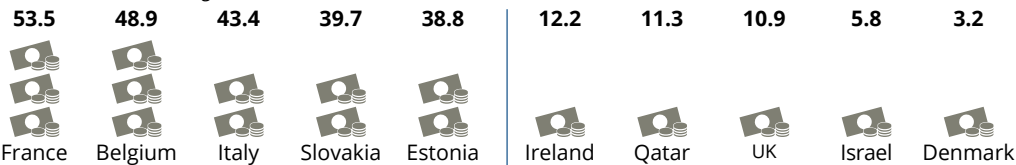
## Getting electricity

Time required for a business to obtain a permanent electricity connection for a newly constructed warehouse (in days)

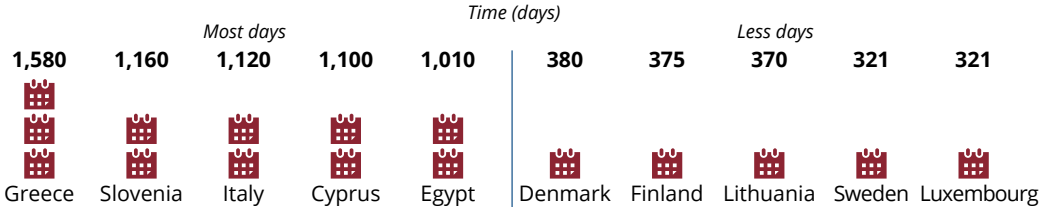


## Taxes

Labor taxes and contributions that a medium-sized company must pay in a year (% of profits)



## Time to resolve a commercial dispute



# INCREASING INVESTMENT FOR DEVELOPMENT

**L**ow investment rates have been a major constraint for development in the Middle East and North Africa since the early 80s.

The average investment ratio of the MENA region (excluding the Gulf countries) between 1995 and 2014 is approximately 25 percent of GDP, compared to 35 percent in East Asia and nearly 30 percent in South Asia. The Asian economies have outperformed their MENA counterparts over the last 15 years through massive capital accumulation that translated into sustained growth rates.

After the Arab Spring, stability- and security-related issues have negatively impacted the MENA economies, but sluggish investment is a structural problem dating far back in time, due to premature de-industrialization in the 80s and a service-dominated development model.

For decades, dominant patronage and rentier economic relations have looked for investment opportunities with short-term returns in real estate, finance and other services, namely activities with limited job creation potential and low technology content. Despite a lack of reliable estimates, there is general agreement that capital flight is also a widespread phenomenon in the region, draining huge resources from the MENA economies.

FDI inflows to the MENA region are mainly directed towards the hydrocarbon sector, which is still by far the most profitable despite the drop of the oil price. However, revenues in hydrocarbon-exporting countries such as Algeria and Libya were not re-invested to diversify the productive structure and absorb the labor force. FDIs in the Middle East and North Africa are also associated with the re-location of economic activities based on the relatively lower cost of the labor force and close access to the EU market. This is the case

with countries such as Morocco, Tunisia and Egypt, which have hardly benefited from any technology spillover nor improved their position in the global value chains, still limited to low value-added sectors.

As noted in the UNDP 2011 Arab Development Challenges Report, the MENA region “is richer than it is developed”. More than five years later, channeling resources into productive activities for job creation is still the main economic challenge for these countries, which are confronted with the need to increase investment and, following the Asian example, engage in managing investment flows to improve their infrastructure endowment, diversify their economies, and enhance their productivity and competitiveness.

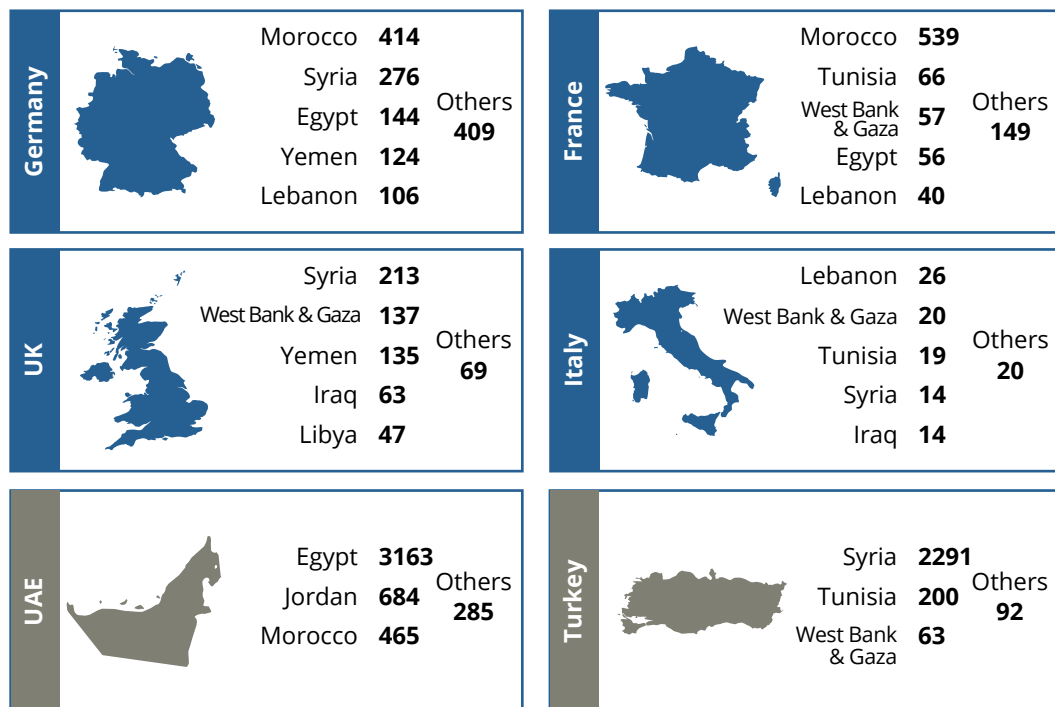
Nonetheless, in recent years some progress has been made to foster investment and promote structural transformation for a more inclusive development pattern in the MENA region. In March 2015 Egypt organized a conference in Sharm el Sheikh to present its ambitious investment plan for infrastructure. Morocco has been carrying out its investment policy to stimulate private sector participation and attract FDIs, particularly in the green economy. Tunisia is working to encourage investment in its underdeveloped areas. Jordan and Algeria have been considering possible strategies to diversify their economies and develop a manufacturing sector.

Much remains to be done to create “developmental” states in the region and overcome a model that has undermined the MENA region's growth potential for at least three decades. International cooperation must continue to support these countries to boost overall investment, but should also assist in strengthening their capacity to target economic sectors with higher technology content and better job creation prospects.

## SUPPORTING REGIONAL DEVELOPMENT

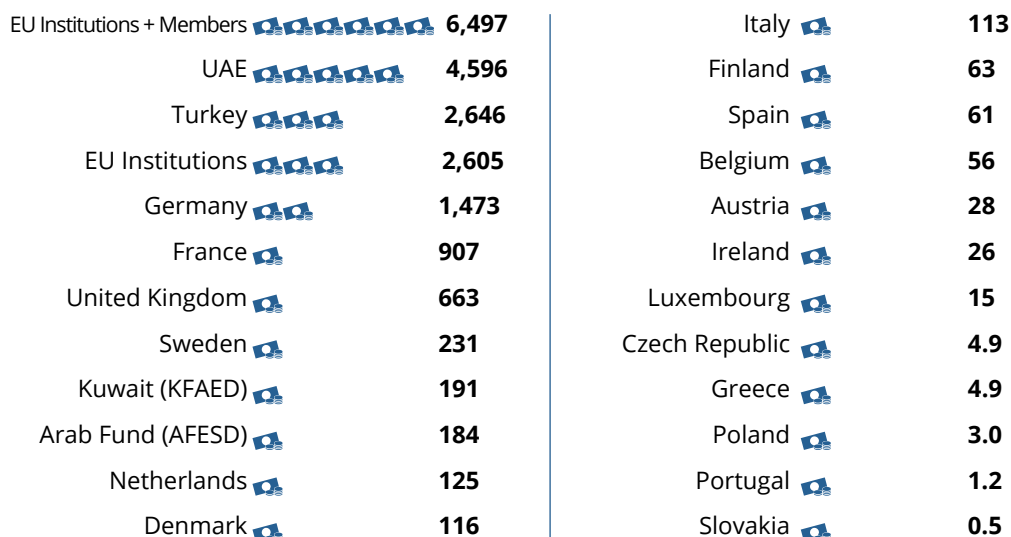
### Official Development Assistance (ODA) in the MENA region

in million dollars



### Total ODA to MENA region by donors

in million dollars



Year: 2015. Data: OECD



## HOW TO FOSTER INVESTMENT IN THE MENA REGION



**Maria Demertzis**  
Research Fellow, Bruegel

*In the recent World Bank Ease of Doing Business Index, most countries of the MENA region saw their position deteriorate considerably (with Morocco and Iran being notable exceptions). This comes with a deterioration in the investment climate, fueled by political uncertainty and a poor outlook. Policies that can help halt and hopefully revert this process, will have to be well targeted but also more strategic in terms of encouraging economic dynamism and inclusive growth.*

*Such strategic policies will have to deal with ways of opening up and strengthening the region's economic capacity. These entail:*

- Encouraging interregional trade and import substitutions such that MENA region economies can be better incorporated in global production chains.*
- Rebalancing the role of the private sector versus the government and ensuring that private businesses are not crowded out by government activities. In this respect explicit commitments should be provided to being pro-business and supporting free markets.*
- Improving institutions, governance and the rule of law.*
- Adopting social policies with a view to engaging the middle classes, women and the young.*
- Targeted policies need to urgently address the following specific areas.*
- Reform education with the specific aim of having an adequately skilled labour force for what each country's markets demand.*
- Address inefficiencies in the labour market that lead to perverse effects like greater unemployment among the better educated, disincentives from hiring or employment in the government sector crowding out business employment.*
- Encourage female participation in the labour market and target the reduction of unemployment among the young.*
- Invest in upgrading infrastructure and ensure the provision of electricity throughout the year.*
- Lastly, the region is going to need capital inflows to finance investment and growth for many years to come. Conditions need to be in place to encourage foreign direct investments and improve access to finance.*

*The importance of political stability and contained uncertainty notwithstanding, financial flows depend crucially on properly functioning banking systems and good lending practices. Efforts to improve governance should therefore aim to enforce proper accounting regulation and financial reporting, protect creditor rights and improve overall business transparency.*

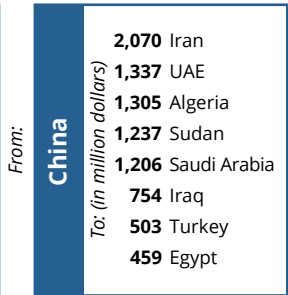
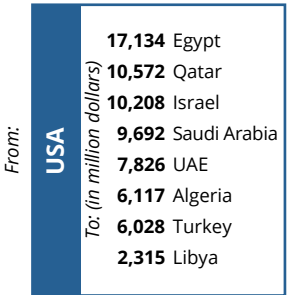
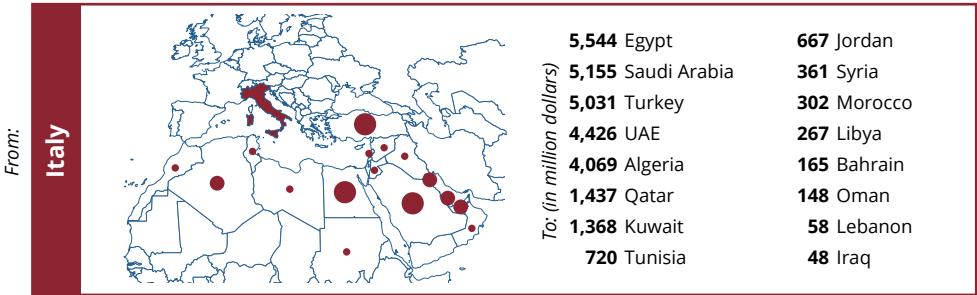
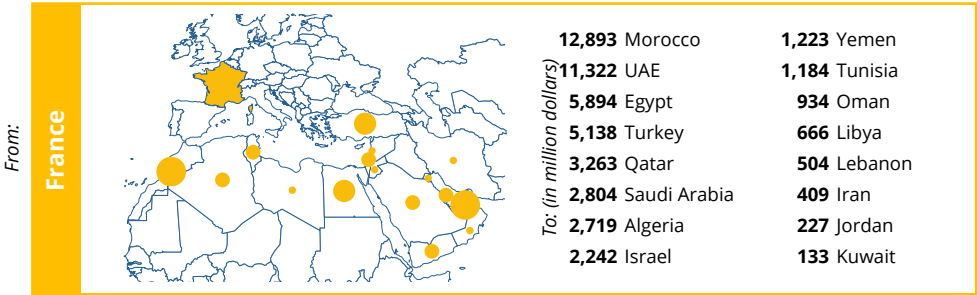
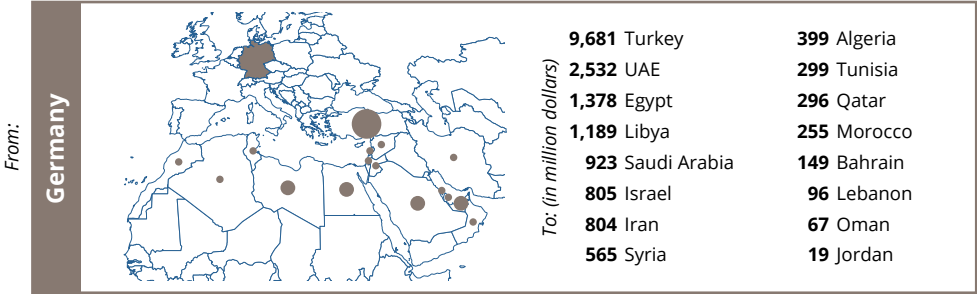


# INVESTING IN THE MENA REGION

FDIs from Germany, France, Italy, USA, China and EIB in the MENA region

Investments in million dollars

● < 1,000    ○ 1,000-5,000    ○ 5,000-10,000    ○ > 10,000



## EIB investments in the region

in million dollars

Country	Sector
2,070 Egypt	758 Energy
1,337 Tunisia	350 Transport
1,305 Israel	175 SME financing
1,237 Jordan	125 Water, sewerage, soil
1,206 Morocco	9 Industry
754 Others	2 Financial sector

# GOING DIGITAL: DREAM OR REALITY?

**O**ver the last two decades, the digital revolution has gradually come to permeate society, to various extents, in most countries of the world. Digitalization, access to broadband internet and to information and communication technologies (ICT) have transformed our daily lives, with multiple effects in the most diverse sectors and domains. From industry to trade, from finance to sciences, from communication to research and innovation, the impact of digital technology extends well beyond increased productivity, to the point that a country's level of digitalization is commonly regarded to as a key indicator of its socio-economic development.

World Bank data show that huge disparities exist in terms of digitalization between the Eurozone and the MENA region, where 78 and 38 people respectively out of 100 en-

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IT IS UNDENIABLE THAT ECONOMIES  
IN THE MENA REGION HAVE BENEFITTED  
FROM DIGITALIZATION

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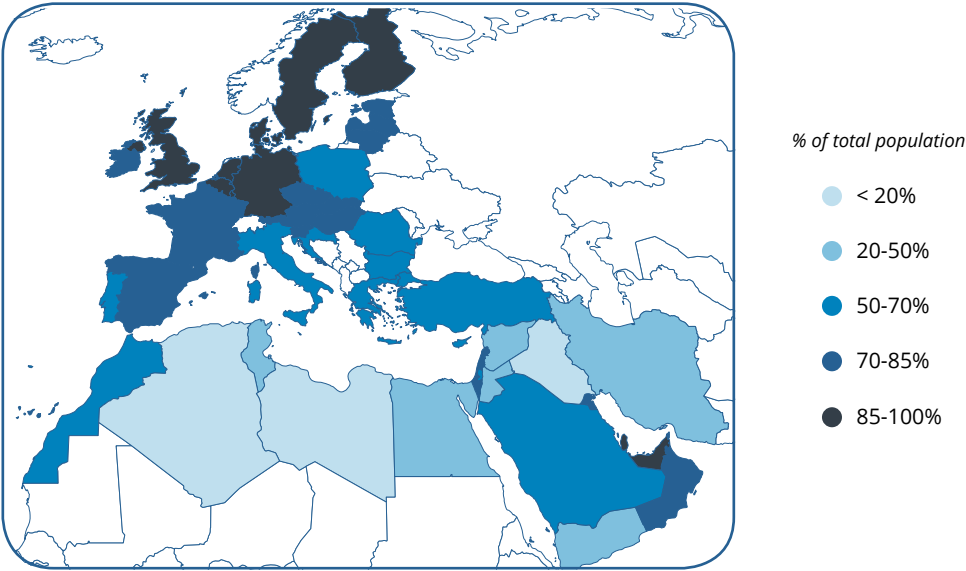
joy broadband internet connection. At first glance, European countries seem to have taken full advantage of the digital revolution, while MENA countries have not been able to keep up. However, on closer inspection, the picture that appears is in fact quite different. The largest disparities are not registered between north and south, but rather between countries within the MENA region itself. For instance, while the Gulf monarchies enjoy almost complete internet access – with Bahrain, Qatar or the UAE performing much better than Italy, Greece or France – in other countries like Iraq, Libya or Yemen ICT accessibility is severely limited (World Bank).

In broad terms, from an economic perspective, it is undeniable that economies in the MENA region have benefitted from digitalization. Between 2013 and 2015, more than \$750M were invested in tech enterprises to launch e-commerce websites, online banking systems, mobile apps, social networks, TV channels and start-ups (ArabNet). The UAE in particular is emerging as a global business hub in this field, but also Lebanon and Jordan are improving, while 'less digital' countries like Egypt and Saudi Arabia are lagging well behind. Also in socio-political terms, digital technology has proved to be a key driver for change, as was shown by recent events in the MENA countries. During the uprisings of the Arab Spring, ICT and the social media became one of the main channels for popular mobilization, by amplifying social discontent and "making the revolts international".

However, beyond best practices in both the economic and socio-political fields, the digital divide in the Mediterranean still represents a reality that cannot be ignored. Unequal distribution of technologies, indeed, risks to be a vector of social inequality, by opening up a rift not only between countries, but also between urban and rural areas, upper and lower social classes, richest and poorer urban districts. What lies behind this divide is a lack of knowledge and skills, which requires investments in education, training and research. Public funding, international cooperation and new financial tools should intervene in this sense. Nowadays the digital dream represents an opportunity not to be missed, which is not confined to the technological sphere, but which is part of a broader strategy for sustainable development and social inclusion.

# THE REGIONAL DIVIDE

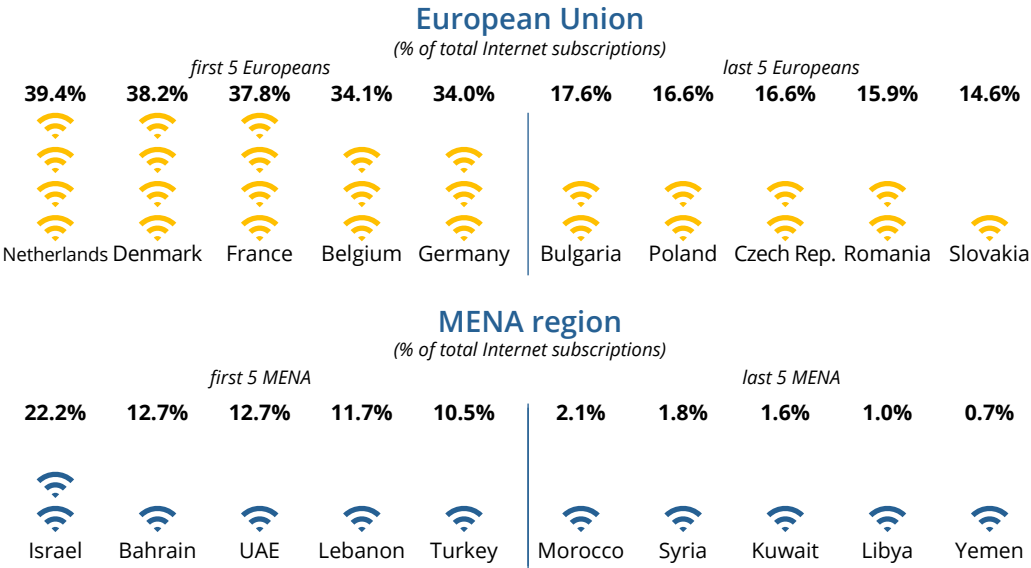
Internet users in the EU and the MENA region



Year: 2015. Data: World Bank

## THE BROADBAND HIGHWAY

Broadband subscriptions



Year: 2015

# THE ENERGY PUZZLE: TOWARDS SUSTAINABLE SECURITY

**P**ipelines and energy shipments have crisscrossed the Mediterranean and its coastal states for decades. While countries

on the Northern seashore are all net energy importers, the situation on the Southern shores is much more varied, with some of the most energy-rich countries in the world (Algeria, Libya) neighboring energy-poor states (Tunisia, Morocco). Others are in the middle of the pack. Egypt, for example, is almost self-reliant in terms of energy supply, although over the last few years it has moved from net exporter to net importer of natural gas.

New changes in the energy landscape – especially for Egypt, Israel, and possibly Cyprus – have originated from the recent discovery of significant natural gas reserves in the Eastern Mediterranean basin. Israel, highly energy dependent overall, is already experiencing a boom in natural gas production that allowed the country to even mull exporting some of it. Today, Mediterranean countries are confronted with two main puzzles: coping with the effects of the 2014 collapse in hydrocarbon prices, and decarbonizing their energy sectors. In energy rich countries, the oil price crash has brought about calls for economic diversification, all the while ushering in a period of austerity as fiscal revenues dwindled. Many countries have been forced to curb public sector wages, and slash gasoline, electricity and water subsidies. Although this complicates their short-term prospects, it might allow them to achieve a better position in terms of economic rebalancing, as experts regarded some reforms as long overdue. On the other hand, low oil and natural gas prices have been a shot in the arm for energy poor countries on both shores of the Mediterranean. But lower costs of hydrocarbon imports have also raised worries of a possible slowdown in long-term efforts to both diversify the energy mix

and move away from carbon-intensive and price-volatile fossil fuels.

This is where the debate on when and how to decarbonize the energy mix comes into play. Over the last twenty years, Northern shore countries have experienced a massive penetration of renewable energy sources (RES) in their energy grid. Italy's share of renewables in power generation is already 31 percent, while the European Union average stands at 25 percent. The picture on the Southern shore is much more diversified, with net energy exporters still lagging behind in terms of RES deployment. But a few Southern shore countries already stand out. Turkey's share of RES power production was 23 percent in 2014, and the country's wind power production (12 TWh in 2015) puts it among the global Top 20. Morocco's integration in the European electricity grid allows it to import "clean" power from Spain. Still, a number of hurdles bog down Southern shore countries that would benefit from higher RES penetration, such as Jordan. One of the key problems experienced by these countries is the significant initial fixed costs needed to deploy big solar and wind projects and connect them to the grid, requiring subsidy schemes that might be unavailable to fiscally-stretched countries.

Increased cooperation between the two shores, along with expanding regional trade of both fossil fuels and electricity, can help address energy puzzles. In the power sector, the establishment in 2007 of MedReg, the Association of the Mediterranean Energy Regulators, allowed for a more systematic exchange of best practices between the two shores. But there is still no overarching initiative bringing together the Northern and the Southern shores to make the energy mix of each and every Mediterranean country more secure and sustainable.

## EUROPE'S THIRST FOR ENERGY



European Union energy  
dependency rate  
**53.5%**

EU imports  
**90%** of its crude oil  
**66%** of its natural gas



Major oil suppliers to EU

Russia	<b>30.4%</b>
Norway	<b>13.1%</b>
Nigeria	<b>9.1%</b>
Saudi Arabia	<b>8.9%</b>
Kazakhstan	<b>6.4%</b>
Others	<b>32.0%</b>



Major gas suppliers to EU

Russia	<b>37.5%</b>
Norway	<b>31.6%</b>
Algeria	<b>12.3%</b>
Qatar	<b>6.9%</b>
Libya	<b>2.1%</b>
Others	<b>9.5%</b>

Year: 2015. Data: EUROSTAT

## MENA'S TREASURE TROVE

Proved reserves of oil (first 10 countries)  
*billion barrels*



Venezuela	<b>300.9</b>	Russia	<b>102.4</b>
Saudi Arabia	<b>266.6</b>	Kuwait	<b>101.5</b>
Canada	<b>172.2</b>	UAE	<b>97.8</b>
Iran	<b>157.8</b>	USA	<b>55</b>
Iraq	<b>143.1</b>	Libya	<b>48.4</b>

Proved reserves of natural gas (first 10 countries)  
*bcm*



Russia	<b>48,700</b>	Saudi Arabia	<b>8,600</b>
Iran	<b>33,600</b>	Iraq	<b>6,400</b>
Qatar	<b>24,700</b>	Venezuela	<b>5,724</b>
Turkmenistan	<b>17,500</b>	Nigeria	<b>5,100</b>
USA	<b>9,860</b>	Algeria	<b>4,500</b>

Year: 2015. Data: BP



## TURNING THE MEDITERRANEAN ENERGY CHALLENGES INTO OPPORTUNITIES



**Simone Tagliapietra**

Research Fellow, Bruegel

and Senior Researcher, Fondazione Eni Enrico Mattei (FEEM)

*A secure, competitive and sustainable energy system is a fundamental prerequisite to economic and social development. The current energy situation in the Southern Mediterranean is characterised by a rapid increase of energy demand, a trend also exacerbated by low energy efficiency and low domestic energy prices due to energy subsidies. This situation is not sustainable and poses several risks to the prospects of socio-economic development of the region, particularly if considering the expanding - and urbanizing - population.*

*However, the region's growing energy demand also represents an opportunity for investment and sector reform. If the Southern Mediterranean could turn its vast regional renewable energy potential into reality, it would help to meet the increasing energy demand and it would also release the region's gas resources for profitable export.*

*Large-scale deployment of renewable energy in the region could only occur by scaling up private investment. Europe can offer support on this, particularly through its long-term public investors such as the European Investment Bank, the European Bank for Reconstruction and Development, Germany's Kreditanstalt für Wiederaufbau, Italy's Cassa Depositi e Prestiti and France's Caisse des Dépôts et Consignations.*

*These investors already finance renewable energy in the region. However, being their actions not coordinated, they have limited leverage in making the sector more attractive to private investors. So, the impact of their investments is often limited to the financing of pilot projects.*

*Instead, the Mediterranean activities of these long-term investors should be coordinated at European level, to enable economies of scale and stronger leverage. To facilitate the coordination work, a new "Euro-Med Sustainable Energy Fund" could be established.*

*This mechanism should be able to provide a solid response to the evidence that private investors might fully jump into the southern Mediterranean sustainable energy sector only if a proper risk-adjusted return is considered as guaranteed.*

*This arrangement would help southern Mediterranean countries to better meet domestic energy demand and thus stimulate economic development. It would also contribute to climate change mitigation. And it would represent a business opportunity for European energy companies, which should be particularly welcome given the sluggish energy outlook within Europe.*

# A REGION STILL DEPENDENT ON OIL RENTS



Oil rents (as % of GDP)

<b>MENA</b>	<b>23.5%</b>
Sub-saharian Africa	7.1%
Latin America	3.3%
North America	0.8%
South-East Asia	0.8%
European Union	0.2%

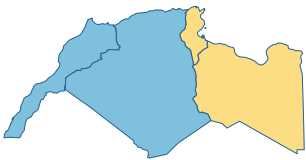
Kuwait	53.0%	UAE	19.0%
Iraq	41.4%	Algeria	18.1%
Saudi Arabia	38.7%	Bahrain	15.3%
Libya	33.3%	Egypt	5.8%
Oman	28.0%	Tunisia	2.9%
Iran	23.6%	Turkey	0.2%
Qatar	19.5%		

Year: 2015. Data: World Bank

## TOWARDS (RE)NEW(ABLE) GOALS

Renewable energy targets declared by MENA countries

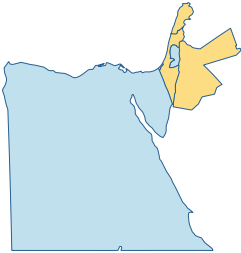
### North Africa



RES power generation over total

	by 2015	by 2020	by 2030
Algeria	6%	15%	40%
Libya	3%	7%	-
Morocco	-	42%	-
Tunisia	11%	-	25%

### East Mediterranean



RES power generation over total

	by 2015	by 2020	by 2030
Egypt	-	20%	-
Israel	5%	10%	-
Jordan	7%	10%	-
Lebanon	-	12%	-
West Bank & Gaza	-	25%	-

### The Gulf States



RES power generation over total

	by 2015	by 2020	by 2025
Bahrain	-	5%	-
Iran	-	-	-
Iraq	2%	-	-
Kuwait	5%	10%	-
Oman	-	10%	-
Qatar	-	2%	-
UAE	-	5%	-
Yemen	-	-	15%

Year: 2014. Data: REN 21/ISEP



NEW IDEAS

## TOWARDS AN EASTERN MEDITERRANEAN GAS HUB?



**Manfred Hafner**

Coordinator of the Energy Scenarios and Policy Research Programme, Fondazione ENI Enrico Mattei (FEEM)

Adjunct Professor, Johns Hopkins University and Sciences Po Paris

*Over the last few years the Eastern Mediterranean has become the ultimate goldmine for the international gas market. With the 2009/2010 discoveries of the Tamar and Leviathan fields in offshore Israel and the 2011 discovery of the Aphrodite field in offshore Cyprus, an unprecedented potential emerged concerning the rise of these areas as a new hotspot in the regional gas markets. However, this initial momentum progressively slowed down in the face of the numerous commercial, political and technical challenges facing the development of the new gas fields.*

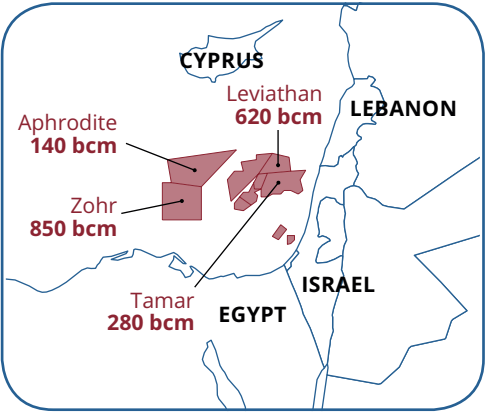
*Suddenly, in 2015 expectations soared again after the discovery of the Zohr gas field in offshore Egypt. Considering its size, this discovery – the largest ever made in the Mediterranean Sea – might potentially represent a game-changer for the regional gas market outlook. Interestingly, Zohr is located only 90 km from Aphrodite, which in turn is only 7 km from Leviathan. This proximity would allow for a coordinated effort to develop the three fields and thus for the creation of the economies of scale needed to put in place a competitive regional gas export monetization scheme. Egypt has already in place a 19 bcm/year LNG export infrastructure, which is currently idle. This infrastructure might be used to export either Egyptian, Israeli, or Cypriot gas to international markets.*

*Such an option would be positive for all the players involved: i) It would be positive for Egypt, that might considerably enhance its geo-economic role in the region, along with its fiscal revenues related to the transit scheme; ii) It would be positive for Israel and Cyprus, that would otherwise not be able to fully exploit their gas resources, which would entail macroeconomic losses; iii) It would be positive for Europe, that would see the materialization of a new, unexpected LNG corridor by 2020, a time when Europe's gas import requirements will grow even if the demand continues to stagnate due to rapidly decreasing domestic production and progressively expiring long-term contracts with Norway and Russia.*



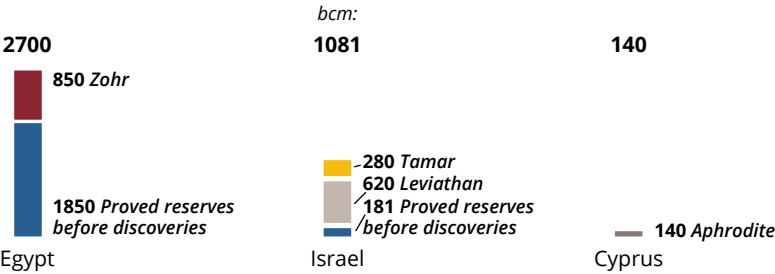
# EASTERN MEDITERRANEAN: ABUNDANCE AWAITS

## New discoveries of natural gas basins

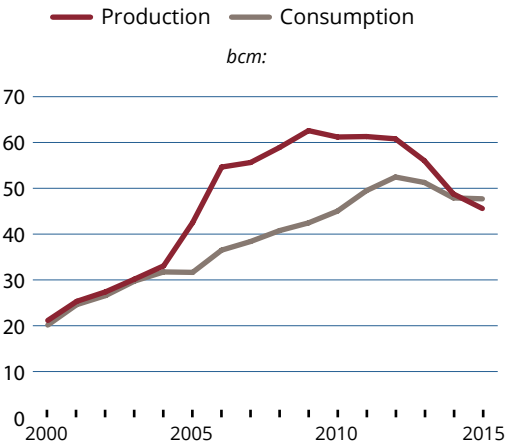


Year: 2015. Data: ENI

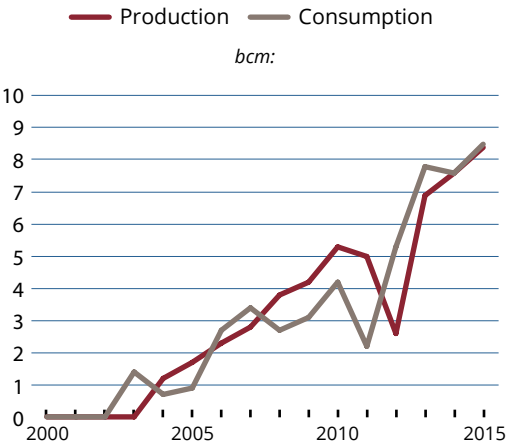
### Proved natural gas reserves and new discoveries



### Natural gas in Egypt



### Natural gas in Israel



Year: 2015-2016. Data: ENI, BP

# MEDITERRANEAN CONNECTIONS: A GLOBAL MARITIME HUB

**G**rowth of international trade over the last two decades has given fresh impetus to the historical vocation of the Mediterranean as a maritime trade route. With 17 ports and 19 percent of global shipping traffic in 2015, the Mediterranean basin has seen a 400 percent growth of container traffic between 1995 and 2015.

The ports of Algeciras and Valencia in Spain rank first and second respectively in terms of TEU (twenty-foot equivalent unit) volume, followed by Port Said in Egypt, Ambarli in Turkey and Piraeus in Greece. Between 2005 and 2015, Port Said and Piraeus have both raised their volume over the total traffic by 4 percentage points; Valencia has expanded it by 2 percentage points, while Algeciras has experienced a drop of 4 percentage points. The Italian port of Gioia Tauro has experienced a dramatic fall of

with the highest volume of exchanges in 2015 (57.9 million of tons) as well as the highest value (50.7 billion euros). Over the last ten years, its competitiveness has improved, as measured by the Linear Shipping Connectivity Index (67.4 in 2015), as has its logistics performance, achieving a score of 3.69 in the Logistics Performance Index.

Nevertheless, much remains to be done to meet the upcoming challenges for the Mediterranean. The trade flows following the Europe-Far East trajectory and connecting the Chinese and the EU markets have increased from 27 percent in 1995 to 44 percent in 2014. This represents a unique opportunity for the Mediterranean to further consolidate its centrality as a privileged route between Europe and Asia. Most of the vessels from Asia and, more specifically, China, in fact, enter Europe via the Suez Canal, whose capacity was basically doubled with the New Suez Canal inaugurated in August 2015. China operates in several Special Economic Zones in Egypt, where it produces a number of goods that are directly shipped to Europe. In January 2016, the Chinese shipping company Cosco acquired a 67 percent stake in the Port of Piraeus.

An untapped potential is to be exploited by Italy and other Mediterranean actors in the future. Bold reform and investment programs are needed to seize the opportunities that may unfold. Not only is the competitiveness of the Mediterranean ports to be enhanced, but new economic activities in sectors such as mechanics or chemistry should be promoted in the Mediterranean basin in order to further boost trade by creating new trade flows, not merely channeling those originating from Asia.

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## MUCH REMAINS TO BE DONE TO MEET THE CHALLENGES OF THE MEDITERRANEAN

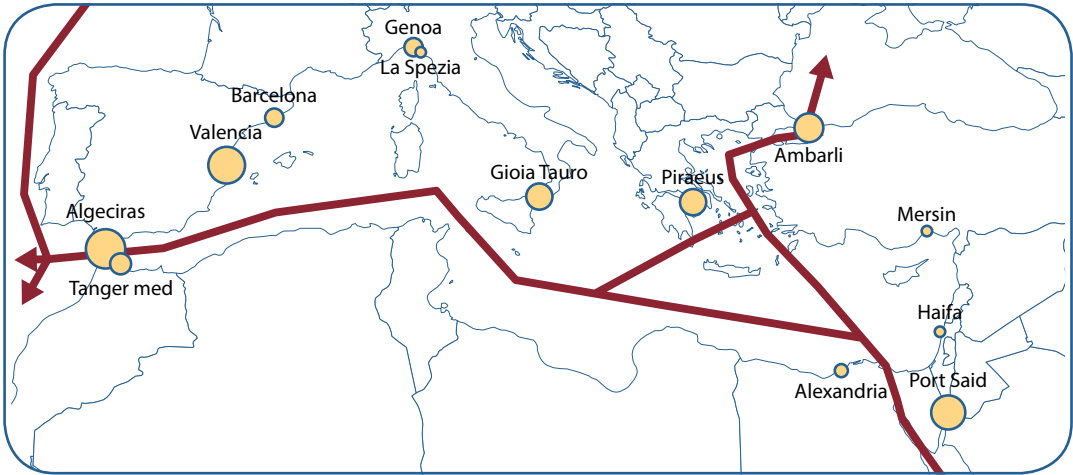
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12 percentage points over the same period, now accounting for 10 percent of total traffic. Tanger Med in Morocco, which has been operational since 2007, now accounts for 11 percent of the TEU traffic. The Moroccan government conceived Tanger Med – aimed to become the largest port in Africa – as part of its ambitious development strategy, coupled with the creation of a Free Trade Zone and an industrial platform where the French automotive company Renault plays a dominant role.

Despite the decline in traffic of the Gioia Tauro port with respect to the other competitors, Italy is still a European leading actor in the Mediterranean maritime trade,

# A SEA OF INTERCONNECTIONS

## Main routes and container ports

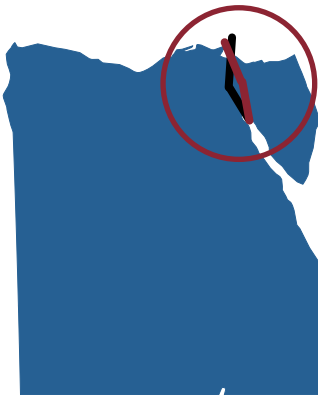


Thousands of TEU (\*Twenty-foot equivalent units)

Algeciras	4,501	Gioia Tauro	3,087	Mersin	1,378
Valencia	4,328	Tanger-Med	2,558	Haifa	1,357
Port Said	4,100	Genoa	1,988	La Spezia	1,298
Ambarli	3,378	Barcelona	1,720		
Piraeus	3,164	Alexandria	1,508		

Year: 2015. Data: The Lloyd’s list of the world’s busiest container ports

## THE SUEZ CANAL: A STRATEGIC ASSET



**72 km long**  
35 km dug afresh,  
37 km expanding  
current canal  
total final length: 170 km



**\$4.3bn**

**7 new tunnels**

for cars and trains, 3 in Port  
Said and 4 in Ismailia will  
connect Sinai Peninsula  
to the rest of Egypt

**\$4.2bn**

Main goals of the  
expansion:

- 1. Allow two-way traffic of ships
- 2. Cut waiting time from 11 to 3 hours
- 3. Double capacity from 49 to 97 ships/ day
- 4. Triple revenues from \$5bn to \$13bn

Year: 2015. Data: Suez Canal Authority

# BLOOMING THE DESERT: HOW TO COPE WITH WATER SCARCITY

**Scarcity of water resources represents a crucial issue for countries on the southern shore of the Mediterranean.**

To be sure, the MENA region is the most water-stressed area in the world. The main causes of water scarcity in these countries are to be found in unfavourable environmental conditions such as desertification, drought, and pollution. At the same time, different factors contribute to aggravating the phenomenon.

First of all, population growth over the last decades has led to increasing pressure on resources. On the one hand, according to the World Bank, given the water poverty line of 1,000 cubic meters per year, between 1962 and 2014 renewable internal freshwater per capita in the MENA region has diminished from 2,068 to 555 cubic meters, and it is expected to fall by half in 2050. On the other hand, the UN Food and

due to inadequate policies and weak legal frameworks also plays a key role in hindering water supply. Over the last decades, one of the most visible effects of bad water governance is the waste of vast water resources. Consider that according to the FAO, inefficient irrigation systems in the MENA countries consume up to 85 percent of the region's water.

The effects of water scarcity are not confined to lack of drinking water, poor living conditions, poverty and sanitation. As a matter of fact, many have repeatedly warned against water resources management as a possible source of conflict in the region, and particularly transboundary resources, such as the Tigris and Euphrates, the Nile and the Jordan River basins. Moreover, given the state's inefficiency in managing water flowing from inside and outside national borders, these resources remain vulnerable to exploitation from non-state actors. For example, when the Islamic State established its power in Syria and Iraq, it took control of the major dams and wells (to the point that some authors have started to talk about "hydro-terrorism").

In this context, water is increasingly becoming both a matter of national security and an element of potential instability at regional level. However, at the same time, water scarcity offers the opportunity for cooperation to successfully manage resources, alleviate shortages and avoid wastes. Water should no longer be addressed as a problem, but rather it should represent a new "flow" towards the identification of common interests and new opportunities.

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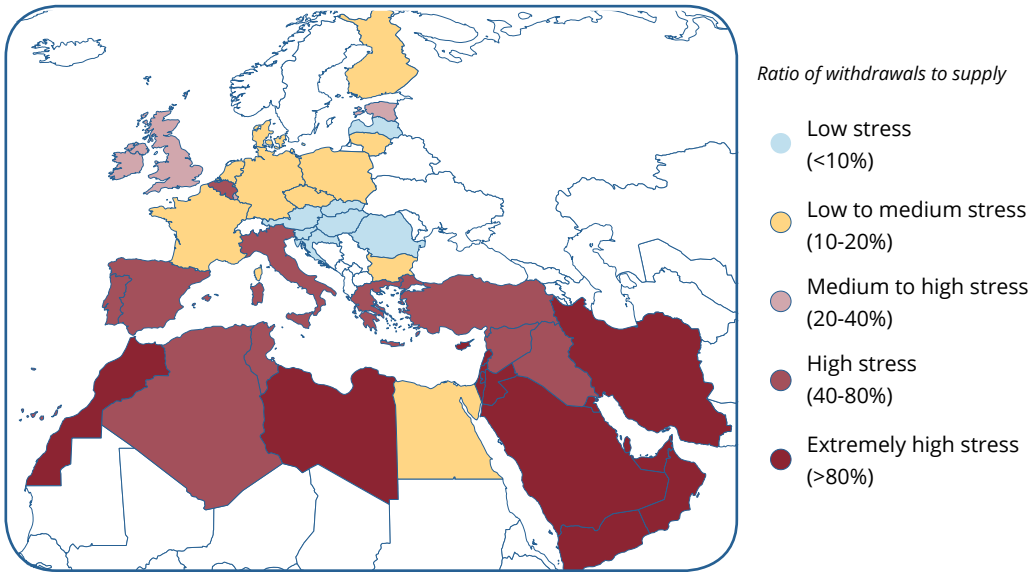
## WATER SCARCITY OFFERS THE OPPORTUNITY FOR COOPERATION

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Agriculture Organisation (FAO) estimated that incremental food demand will drive up food production in these countries by nearly 100 percent by 2050, putting pressure on agricultural systems as well. Second, growing urbanisation and economic development are increasing the demand for water to be exploited in the most diverse sectors, from daily usage to industrial settings, from sanitation systems to infrastructures. Third, in addition to socio-environmental issues, the mismanagement of surface water and groundwater

# THE MEDITERRANEAN: A BASIN WITHOUT WATER?

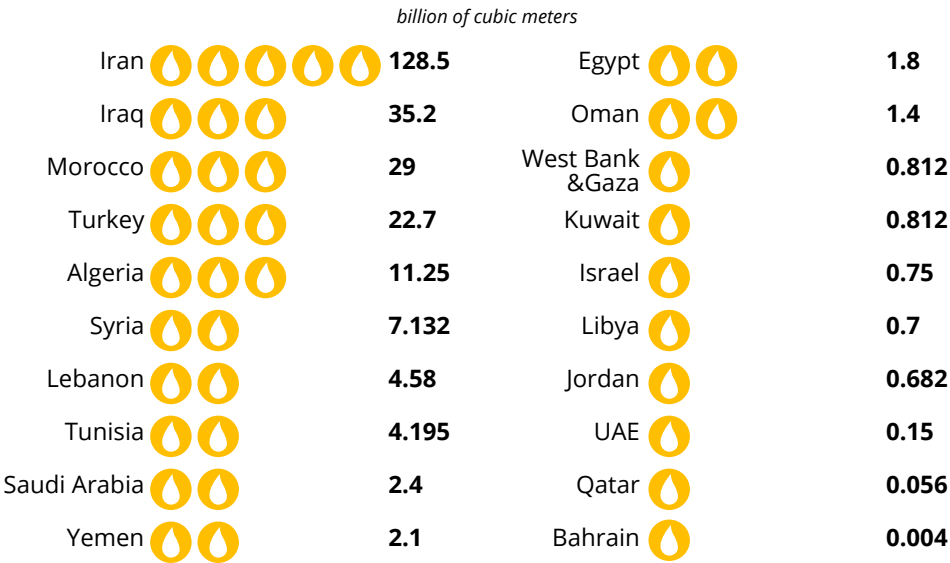
## Regional exposure to water stress



Year: 2015. Data: World Resources Institute

# WATER RESOURCES: A WORRYING SCARCITY

## Total internal renewable water resources



Year: 2015. Data: FAO

# BETTING ON EDUCATION: AN ASSET FOR THE FUTURE

**O**ver the past decades, the extended Mediterranean region has registered remarkable improvements in the education sector.

In particular, in the MENA countries the average level of schooling has quadrupled, illiteracy rates halved and the gender gap affecting access to education was significantly reduced (World Bank). Public expenditure on education has risen to an average 5.3 percent of GDP, with higher education increasingly becoming a priority for many governments in the region (World Bank). Nevertheless, in spite of data showing significant quantitative improvements, alarming trends have emerged. From a general perspective, it is widely acknowledged that in many countries in the region schooling is not always accompanied by learning. This is largely due to the low quality of public education and training systems, an issue which also risks to widen the gap between those who have access to private education – usually more qualified – and those who do not. Inadequate preparation, combined with rigid policies regulating new entrants' access to the labor market, further reduces youth employability, particularly in the private sector. In the MENA countries, this situation fosters socio-political marginalization and disenfranchisement, pushing human capital towards the informal sector, which already accounts for 50 percent of employment in non-agricultural sectors. Given a real GDP growth of around 2.7 percent, youth unemployment rates at around 30 percent, and the share of youth (aged 15-29) exceeding 30 percent of the working-age population (World Bank), the MENA region requires new strategies to project sustainable economic models and engage youth in economy and

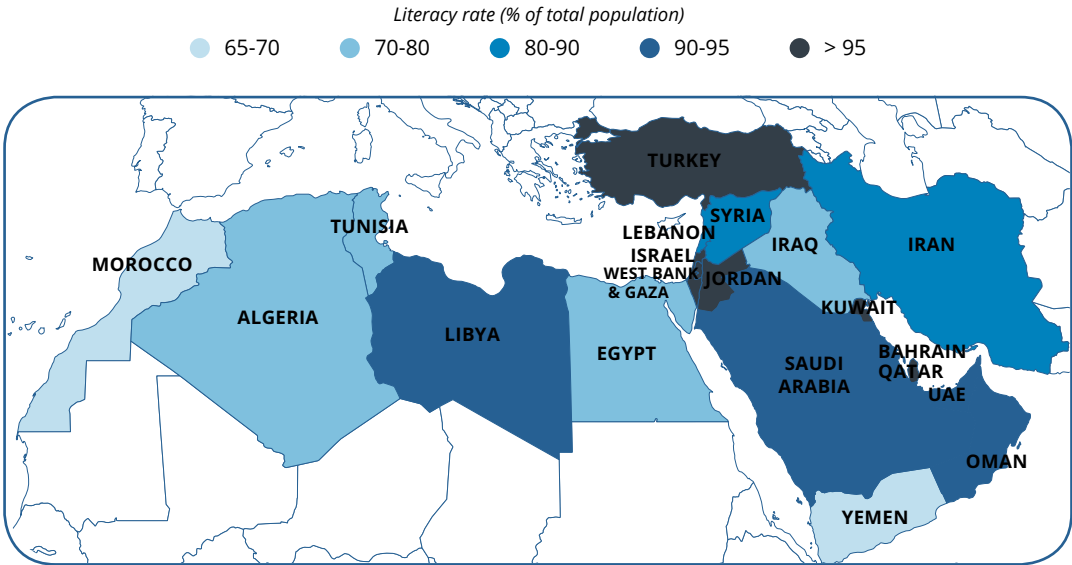
in public life. At the same time, prolonged humanitarian crises in the region have brought about the collapse of school and university systems in countries like Libya, Yemen and especially Syria, and risk to give rise to what has been dramatically defined the “lost generation”. Children's education in these contexts is often entrusted to international organizations and NGOs, although such solutions are often precarious and not adequate in the long term.

In Europe, the rate of early leaving from education and training dropped from 17 percent in 2002 to 11 percent in 2015, 94.3 percent of the young population participated in Early Childhood Education and Care Programs (ECEC, and the share of 30 to 34 years old completing tertiary education reached 38.7 percent (Eurostat). Nevertheless, high rates of youth unemployment (19.7 percent by the end of 2015) and the number of young people neither in employment nor in education or training (NEET) (18.9 percent in 2015) prove that the EU is facing critical phenomena as well. Such trends seem to question the efficiency of the European countries' schooling and training systems, and their capacity to bridge the gap between education and job market.

Poverty and social exclusion as well as a considerable loss in terms of productivity are the main implications of these structural weaknesses. More ambitious and long-term approaches are therefore in urgent need in both Europe and the MENA region, although no unique solutions can be really effective while tailored responses have to be favored. This appears to be a necessary effort in order to guarantee a future to the youth and, all in all, an essential step toward shared prosperity and political stability.

# EDUCATION AS A KEY FACTOR

## Literacy rate in the MENA region



Year: 2016. Data: World Bank

### MORE CONFLICTS, LESS EDUCATION

#### Primary school enrollment



Egypt	99.9%	Qatar	92.1%
Iran	99.2%	Oman	91.1%
Tunisia	98.6%	West Bank & Gaza	90.8%
Morocco	98.4%	UAE	90.7%
Algeria	97.3%	Jordan	87.5%
Israel	96.9%	Lebanon	86.6%
Saudi Arabia	96.4%	Yemen	84.8%
Turkey	92.9%	Syria	83.5%
Kuwait	92.1%		

### REACHING HIGHER

#### Graduates on total labour force

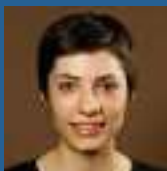


West Bank & Gaza	30.5%	<i>Data not available for other countries</i>	
Jordan	28.3%		
Turkey	19.8%		
Tunisia	19.4%		
Kuwait	19.1%		
Egypt	18.7%		
Algeria	15.2%		
Bahrain	9.8%		
Morocco	9.2%		

Year: 2016. Data: World Bank



# INVESTING MORE, INVESTING BETTER



**Sarah Hartmann**

Associate Fellow, Middle East and North Africa Program,  
German Council on Foreign Relations (DGAP)

*While there is no doubt that investment in education is crucial for fostering prosperity, competitiveness, creativity and democratic development, most education systems in the Southern Mediterranean are currently failing to live up to the expectations. Remarkable progress has been made in the past decades regarding access and enrollment rates, but quality and outcomes are still low in international comparison. Exam-focused systems, which encourage memorization rather than critical thinking, have contributed to a devaluation of academic degrees, which no longer translate into job opportunities and socio-economic status as before. While these problems are well known and there is no lack of critical analysis<sup>3</sup> and ambitious reform plans, implementation of reforms is slow, and there is often a gap between what is written on paper and what happens on the ground. The question is not whether there should be more investment in education, but rather how to prioritize the allocation of funds. While the specific challenges vary from one country to the next, the following policy recommendations address some fundamental issues, which should be of general concern.*

- *Prioritize the public system and the poor: Instead of promoting the establishment of private schools and universities, as has been the case in some countries, more resources should be allocated to public education and to marginalized areas, in order to benefit the majority of the population, and especially the poor, and to restore social cohesion and trust in public education systems. Experiences with unchecked privatization of education have shown that it tends to exacerbate social segregation and inequality.<sup>4</sup> Equal access to quality education for all should therefore remain a priority task of the state.*

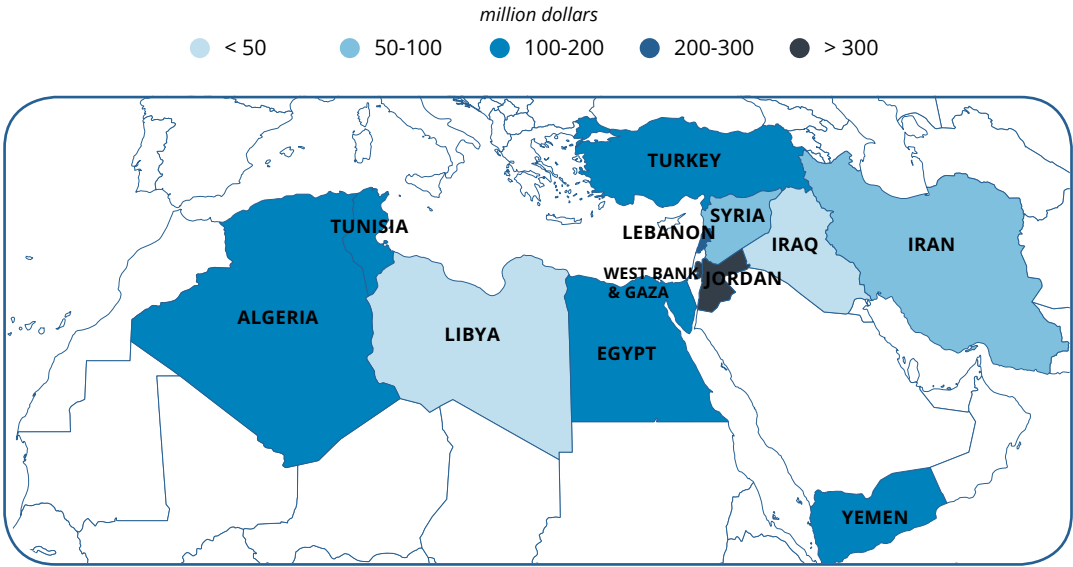
- *Fair pay for teachers: In order to recruit and retain qualified, well-trained and motivated teachers, fair contracts and adequate salaries are of paramount importance, so that teachers no longer depend on additional sources of income such as private tutoring.<sup>5</sup> Teaching needs to be perceived as an attractive and rewarding profession again, both socially and economically.*

- *No excellence in education and research without academic freedom: Creativity, independent and critical thinking need to be fostered on all levels of the education system, from primary school to university, among students as well as teaching and administrative staff. Academic freedom is of course closely linked to freedom of expression more generally. Democratic governance of schools and universities needs a democratic environment to thrive.*



# BOOSTING EDUCATION

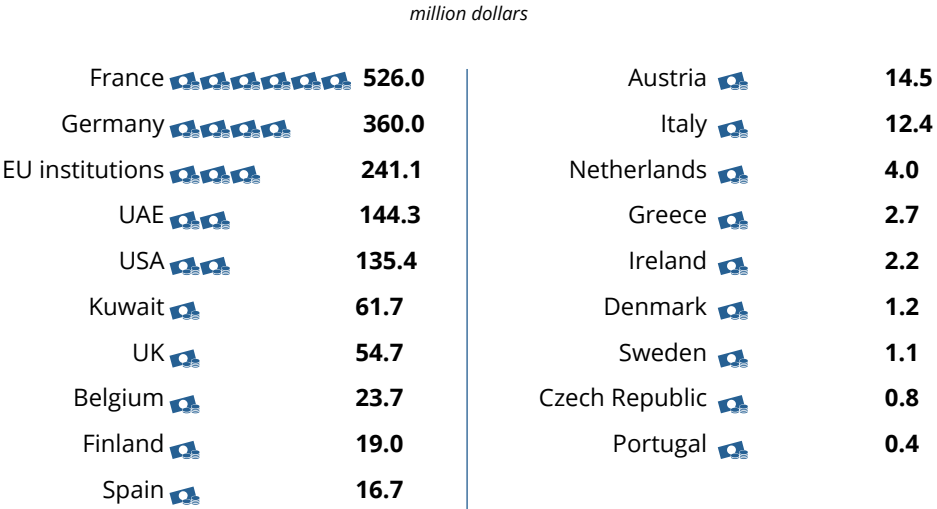
## Total education-related aid by recipient



Year: 2015. Data: OECD

# INVESTING ON EDUCATION

## Total education-related aid to MENA countries by donor



Year: 2015. Data: OECD

# MIGRATION





# 3

## MIGRATION

62 At the Root of a Complex Phenomenon

66 Migrants in Transit

70 Europe: What Lies Beyond the “Walls”?

74 Syrian Refugee Crisis: Heading Towards  
a Better Regional Management

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# AT THE ROOT OF A COMPLEX PHENOMENON

**F**or centuries, the Mediterranean has been crossed by a multitude of peoples.

The flow was mostly northbound, and always composite. In recent decades, most MENA countries enjoyed a period of relative socio-political stability and were able to keep migratory pressures in check. This has allowed Europeans to almost forget how close the Southern and Northern shores of our common sea actually are. But much has changed since violence and political instability in the region escalated in 2011 and in 2015 alone around one million migrants reached Italy and Greece by sea. The clear correlation between regional instability and the renewed flow of asylum seekers and economic migrants to Europe's southern shores put the spotlight on short-term factors pushing people to leave their homeland.

Violence has historically been one of the main reasons forcing people to flee their homes and reach different places within the same country (internally displaced persons) or go abroad in search of – temporary or more permanent – refuge. UNHCR estimates that in 2015 as much as 60 million people were living as displaced persons as a result of persecution, conflict, generalized violence or human rights violations. And it should not be overlooked that, on average, over 80 percent of those who flee tends to settle in neighboring states. Europeans only see a trickle of that flow.

Sudden shocks to political and socio-economic stability can also act as permissive conditions. As state capacity collapsed in Libya, and ordinary sources of revenue from oil and natural gas drastically declined, some areas of the country rapidly became a safe haven for migrant smugglers and human traffickers. When such a trend becomes entrenched, it can be difficult to put in place robust mechanisms to eradicate trafficking, as the latter increasingly

represents the most viable source of revenue for local kinship networks and groups.

But aside from conflicts, at the root of the global increase in migratory flows there are longer-term, more permanent forces. The globalization of means of transport and communication, for one, makes it easier today for people to gather information on potential destination countries, and then to find ways to reach them.

Demography plays a key role as well. While Europe is getting older, and its population is forecasted to decline in the foreseeable future, people living in Sub-Saharan African countries are expected to double from 1 to 2 billion before 2050, and fertility rates are expected to decline only gradually (from 5 to 3 children per woman). Population growth in developing countries puts increasing pressure on scarce resources (water, food, and energy) and pushes people to look for opportunities abroad.

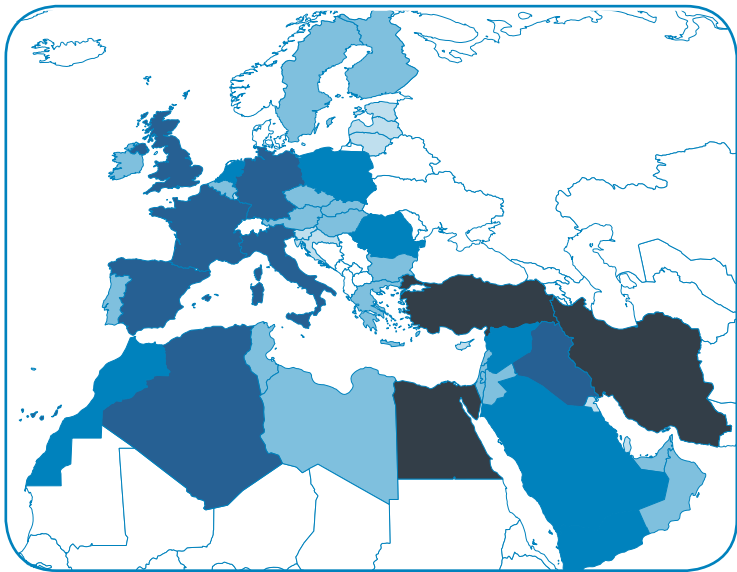
Economics is a major long-term factor as well. It is still unclear whether higher GDP growth in developing countries will keep up with population growth, which means that it is uncertain whether average incomes will ever catch up with middle-income country thresholds, not to mention more ambitious targets. Moreover, high levels of inequality imply that newfound riches do not tend to benefit citizens equally, but they concentrate in the hands of a lucky few.

Other longstanding issues pushing people to migrate and seek refuge or opportunities abroad include low state capacity, the propensity of public authorities to resort to torture or other violations of human rights, entrenched ethnic or social cleavages, and periodic persecution of minorities.

All these long-term forces at the heart of migratory trends imply that migration is here to stay.

# DEMOGRAPHIC PRESSURE

Expected population in 2030



Total population in millions

- < 5
- 5-15
- 15-40
- 40-80
- > 80

Year: 2016. Data: UN Population Prospects

# AN UNBALANCED DEMOGRAPHIC GROWTH

Expected population change 2015-2050 (%)

North Africa



+58%

Middle East



+42%

Eastern Europe



-19%

Northern Europe



+14%

Southern and Western Europe



-2%

Year: 2016. Data: UN Population Prospects



# THE MEDITERRANEAN: GATEWAY TO EUROPE'S HISTORY AND FUTURE



**Wolfgang Kaschuba**

Director, Berlin Institute for Integration and Migration Research (BIM)

*For centuries, the Mediterranean Area has represented the starting point and also the destination of interregional mobility for all European states and societies. This applies to armies as well as traders, to travellers and artists, to workers and refugees alike. It is this historical function as a "European gateway" for the exchange of people, ideas and goods that has to provide the basis for today's search for ways of dealing with the current flows of refugees. Additionally, the remarkable achievements of the Mediterranean states in receiving and integrating hundreds of thousands of refugees in the past must not be overlooked.*

*Consequently, strategies to deal effectively with the present and also the future situation at the Southern European external borders need to take into account this historical Mediterranean community of common fates and interests.*

*This requires, first, the acknowledgement that, in the context of globalization, a concept like "Fortress Europe" can no longer be regarded as a viable option over an approach that is based on a collaborative and flexible border system with clearly coordinated European regulations for accepting refugees and granting asylum.*

*Secondly, the European political horizon should be extended across the Mediterranean Sea to include neighbouring states in Africa and the Middle East in order to gradually eliminate the causes of flight and humanitarian crises on site, through joint economic, social and cultural support programs. These are crucial investments also in Europe's own future.*

*Thirdly, a discussion on the policy for refugees based on "fair" economic and humanitarian rules in terms of distribution should be introduced at European level. "Fairness" should not only take into account the specific capacities and capabilities of individual European states, but it should also consider the actual chances of integration for different refugee groups in their host countries.*

*Fourthly, this approach should translate into a European "Masterplan for Integration" to stipulate agreements according to common standards, such as mutual help in ensuring decent living conditions for all: this involves language acquisition and education, working and housing conditions, and also the social and cultural participation of refugees.*

*Right here, on the shores of the Mediterranean Sea, it will thus be decided if in the midst of the "refugee crisis", Europe will be able to successfully overcome its own "identity crisis".*

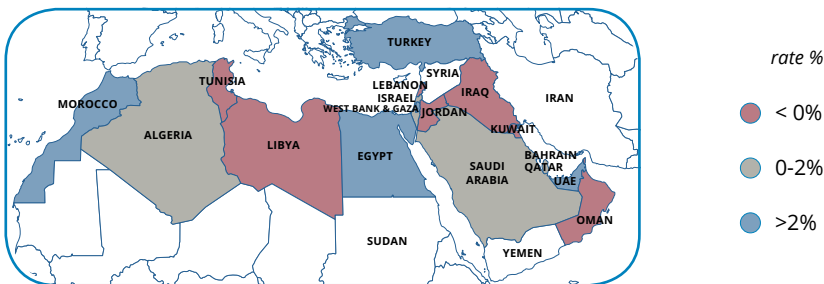
# WHY DO PEOPLE MIGRATE?

## Economy and demography

### GDP per capita



### GDP per capita growth rate



### Population growth rate



# MIGRANTS IN TRANSIT

**M**ore than a million people crossed the Mediterranean in an attempt to reach Europe in 2015 – a figure higher than cumulative arrivals in the previous nine years. Political instability on the southern shore of the Mediterranean and worsening economic prospects have been among the reasons for the spike in arrivals. Indeed, about half of the migrants to European States came from just three countries that are beset by conflict: Syria, Iraq, and Afghanistan. Many others have travelled from Sub-Saharan Africa through Libya, a country that has been ravaged by war for the last five years.

Crucially, migrants reaching Italy and Greece tend not to settle there: surveys show that in 2015 over 90% of migrants reaching Europe's southern shores had a different European country of destination in mind. This goes to show that European first countries

Afghanistan, and Pakistan to cross Middle Eastern countries in an attempt to reach Europe, making Turkey and Iran "hybrid" transit/destination countries as well.

Migrants usually take an average of over 5 years to reach the intended country of destination. As they travel, many factors may change compared to their initial condition: migrants tend to get poorer, lose high-level skills, and increase in number as women become mothers. As they move from country to country, migration management entails monitoring and supporting the development of origin and transit countries over the whole length of migratory routes.

Transiting migrants pose serious challenges in terms of country-level or regional policy response. Such migrants tend to have peculiar educational, training, or working needs, and may participate only sporadically in the official labor market as they are generally employed in the informal sector. Transit countries are therefore faced with the dilemma of improving the livelihoods of these migrants, all the while being aware that migrants that have been trained and hosted for years may very likely attempt to leave for new destinations, therefore not contributing to the country's public finances or welfare systems in the long run.

Coping with increasingly large, volatile, and unstable flows has become an imperative challenge for transit countries. As migrants risk becoming "stranded" and opt for second-best options compared to their initially intended destination, transit countries tend to become more and more destination countries as well. And as transiting migrants increase in number, the international community will be hard pressed to find collective solutions to an ever-changing problem.

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## MIGRANTS TAKE OVER 5 YEARS TO REACH THE INTENDED COUNTRY OF DESTINATION

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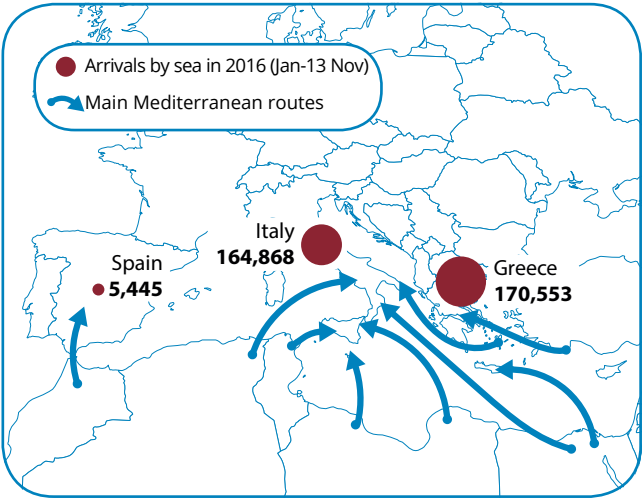
of arrival are becoming more and more transit than destination countries.

Over and across the European borders, the distinction between "transit" and "destination" country tends to lose its meaning. In September 2016, for example, the International Organization for Migration estimated that over 275,000 people were "transiting migrants" stuck in Libya. Over the previous six months this number had not decreased even as more than 100,000 people embarked for Italy, attesting to a constant flow to Libya from Sub-Saharan African countries. Meanwhile, the Syrian crisis has pushed more and more asylum seekers from Iraq,



# THE MEDITERRANEAN ROUTE

## Arrivals by sea



**341,055**  
arrivals by sea in 2016  
*(up to 13 November)*

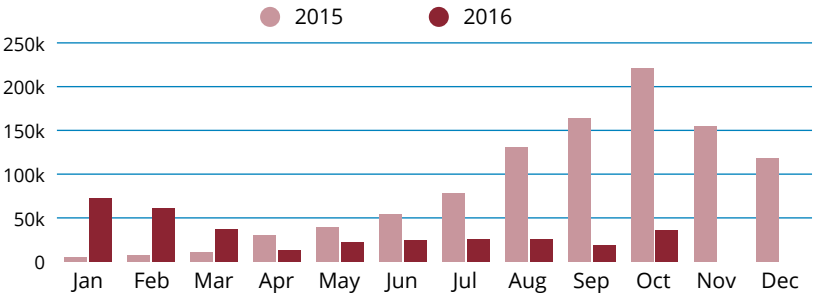
**1,015,078**  
arrivals by sea in 2015

**4,271**  
dead/missing in 2016  
*(up to 13 November)*

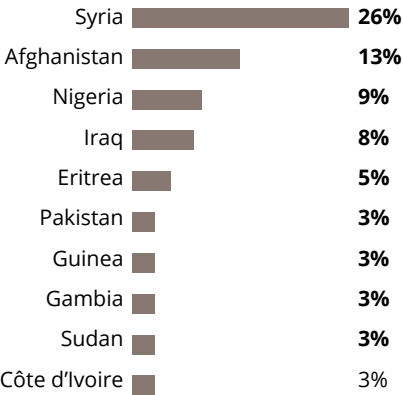
**77%**  
of arrivals come from  
the world's top 10  
countries of origin

**27%** children    **18%** women    **55%** men

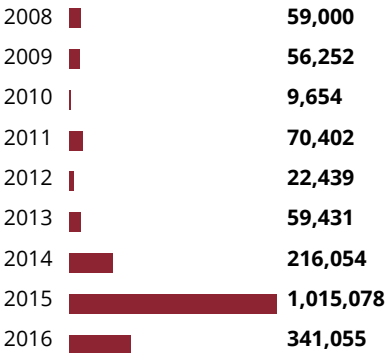
### Comparison of monthly Mediterranean sea arrivals



### Top 10 countries of origin



### Sea arrivals over the years





## FACING A HUMAN AND POLITICAL CHALLENGE



**Dorothée Schmid**

Head, Turkey/Middle East Program,  
Institut Français des Relations Internationales (IFRI)

*In 2015, more than one million migrants and refugees arrived in Europe seeking a better future or simply for security reasons. With around 800,000 more arrivals than in 2014, 2015 has seen the biggest displacement of populations in the Mediterranean since the Second World War. Fifty-one percent of the migrants arriving in Europe in 2016 came from Syria, Afghanistan, or Iraq, three countries ravaged by war.*

*The European Union, in the throes of a political and economic crisis itself, is struggling to manage these flows. The EU and its Member States were late in searching for solutions to address the emergency. The agreement signed with Turkey in the spring of 2016 stands as an example of their recent efforts. The deal entails the return to Turkey of any migrant or refugee arriving in Europe from the Turkish coast. For every Syrian refugee sent back to Turkey, the EU will resettle one to Europe. In return for Turkey's contribution to the refugee crisis, the EU has granted six billion euros to Turkey and will implement visa-free travel for Turkish citizens as soon as Ankara meets Brussels's criteria.*

*Six months after the signing of the agreement, the migrant flows across the Aegean Sea have notably decreased. This is partly the result of the Turkish authorities' actions to prevent crossings. Yet the political message sent by the EU also helped deter potential migrants as they realized that the regulation of movement in the Mediterranean has become a priority for the EU.*

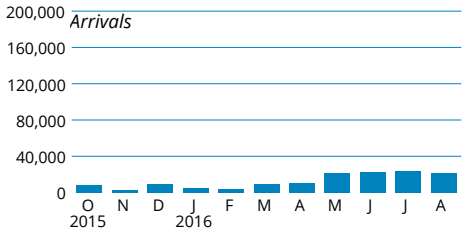
*Can the relatively efficient EU-Turkey deal be replicated elsewhere? The New Migration Partnership Framework announced by the European Commission in June 2016 indicates that it will seek "tailor made partnerships with key third countries of origin and transit". This October, a deal was signed with Afghanistan, planning the return of Afghan refugees who are refused asylum in the EU. Prospects of achieving an agreement with Libya remain low as the country has no effective administration.*

*Negotiations have started with Tunisia regarding the readmission of illegal migrants; in return, the EU proposes to ease the conditions for short stay visas. The European Commission also intends to bring the issue on the agenda with Egypt. However, in order to pursue such agreements, the EU will have to ensure that the migrants who are sent back are treated according to European standards. Another financial effort seems inevitable, also to improve the capacities of the Frontex agency.*

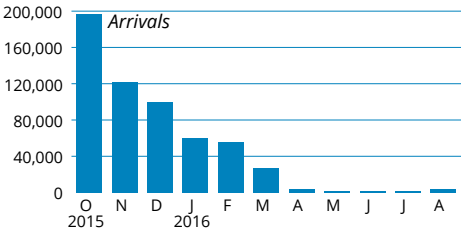
# REACHING EUROPE

## Illegal arrivals in selected EU countries

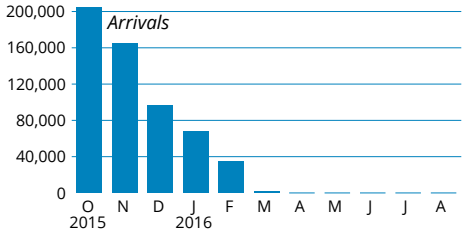
Italy



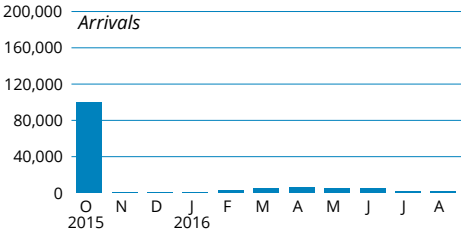
Greek islands



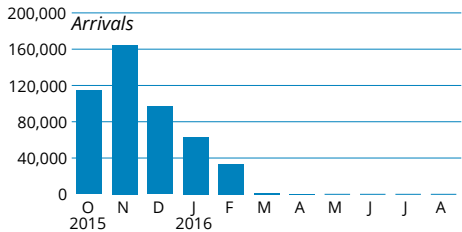
Croatia



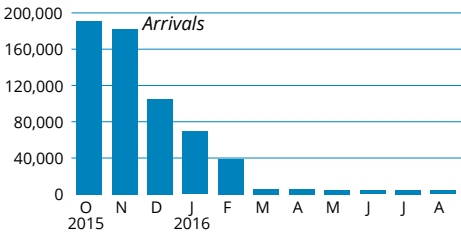
Hungary



Slovenia



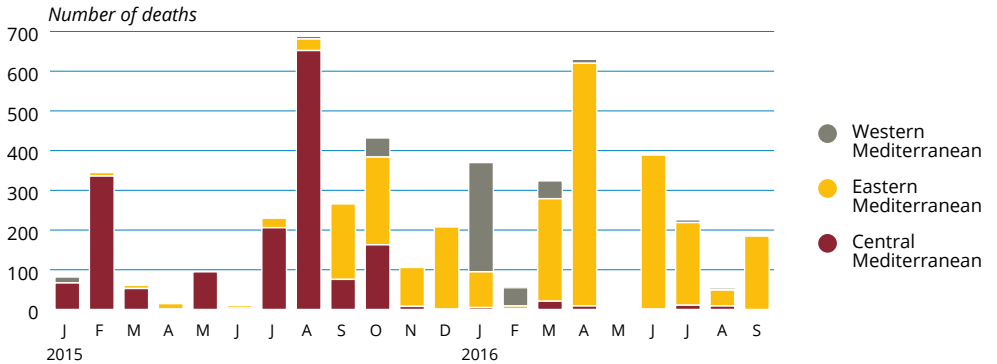
Austria



Year: 2016. Data: UNHCR

# DANGEROUS ROUTES

## Recorded deaths in the Mediterranean sea



Year: 2015-2016. Data: IOM

# EUROPE: WHAT LIES BEYOND THE “WALLS”?

**Every time migratory flows in Europe recorded sudden increases, the European Union has tried to coordinate the response of its Member States.** This was the case for intra-European migration in the wake of the 2004-2007 Eastern enlargements, and the same happened in 2011, when the Arab Spring pushed Tunisian migrants to flock to Italy in an attempt to reach France. Not surprisingly, the EU developed responses also to the ongoing migration crisis in the Mediterranean. Since the beginning, however, policymakers at EU level have been faced with the daunting task to strike a compromise between 28 Member States, each with their own interests, perceptions, and electoral calendar to weigh in. This has slowed down the process considerably, even in the face of some rapid (albeit fleeting) political commitments at country level, such as the decision in September 2015 by

ment discouraged arrivals, by promising a swift return to Turkey to migrants reaching Greece illegally.

As much as the uncontrolled and sudden inflow of migrants required immediate policy action, there is also a need to address long-term forces that shape such flows in the first place, and to engage with migrants that eventually reach European countries. With regards to closing illegal routes and saving migrants' lives, European Commission officials frequently point to the urgent need to strengthen legal channels of migration. But as long as Member States remain wary of the risks of migration without seizing its opportunities, it will be hard to even consider revisions to the Blue Card Directive, which regulates access to the EU labor market for highly skilled workers.

Effective, systematic and harmonized integration policies for asylum seekers and migrants in general are also urgent. At the European and country levels, more consistent protection and integration policies would discourage migrants' secondary movement between Schengen countries. At the individual level, strong and coherent integration policies would allow migrants to learn languages, adapt faster to the customs of their destination country, and make an even more positive contribution to that country's labor market and welfare systems.

A third pillar of a longer term approach is the use of “migration compacts” (formally, New Migration Partnership Frameworks) between the EU and third countries. These are attempts to link migration management with a share of the EU's official development aid, coupled with an External Investment Plan that should enhance the developmental prospects of origin and transit countries in Africa, the MENA region, and South Asia.

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## EFFECTIVE, SYSTEMATIC AND HARMONIZED INTEGRATION POLICIES FOR ASYLUM SEEKERS AND MIGRANTS ARE URGENT











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the German Chancellor Angela Merkel to welcome Syrian asylum seekers swarming to Europe.

The snail's pace in the implementation of the asylum seekers' relocation plan (one year after the final agreement of September 2015, only about 6,000 asylum seekers had been relocated out of the 106,000 promised by the end of 2017) is just one example of the slow, divisive nature of EU policy responses. At national level, six Schengen area countries facing high migratory pressure decided to reinstate internal border controls, while others built new walls (Hungary) or reinforced previous fences (Bulgaria). Outside Schengen, the March 2016 EU-Turkey agree-

# THE EUROPEAN NAVAL RESPONSE

## EUNAVFOR MED Sophia operation

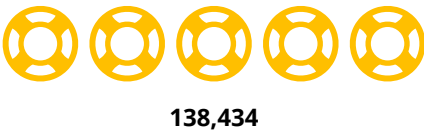
	Troop contributing nations	25	→ Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovenia, Slovakia, Spain, Sweden, United Kingdom
	Total personnel	1,291	
	Naval units	9	
	Helicopters	4	
	Air assets	3	
<hr/>			
	Smugglers & traffickers arrested	87	
	Vessels removed	296	
	Migrants rescued	25,993	
	Rescue operations	178	
	Migrants rescued via aero-naval support	38,031	
























Year: 2016. Data: EUNAVFOR MED

# BEYOND EUNAVFOR MED

## Poseidon and Triton operations

People rescued between January and July 2016



POSEIDON		Units deployed	TRITON	
680	      	Frontex guest officers	    	509
21	 	Vessels		16
1		Aircraft	   	4
1		Helicopters	 	2

Year: 2016. Data: EUNAVFOR MED



## A REALISTIC AGENDA ON MIGRATION FROM AFRICA



**Mattia Toaldo**

Senior Policy Fellow, Middle East and North Africa Programme,  
European Council on Foreign Relations (ECFR)

*When the refugee crisis started in April 2015, the prevailing reaction across Europe was one of sympathy for the victims of shipwrecks and understanding for the refugees that survived, although it is only in some countries that a “refugees welcome” policy was put in place. One and half years later, the prevailing trend across Europe is one of insulation from the refugee crisis. The full spectrum extends from countries that have built walls and closed borders to countries that are struggling to manage the large inflows of 2015 and early 2016 and are therefore less keen to take more refugees. While showing divisions and experiencing changing reactions to refugees, Europeans seem to share an opposition to any intake of economic migrants.*

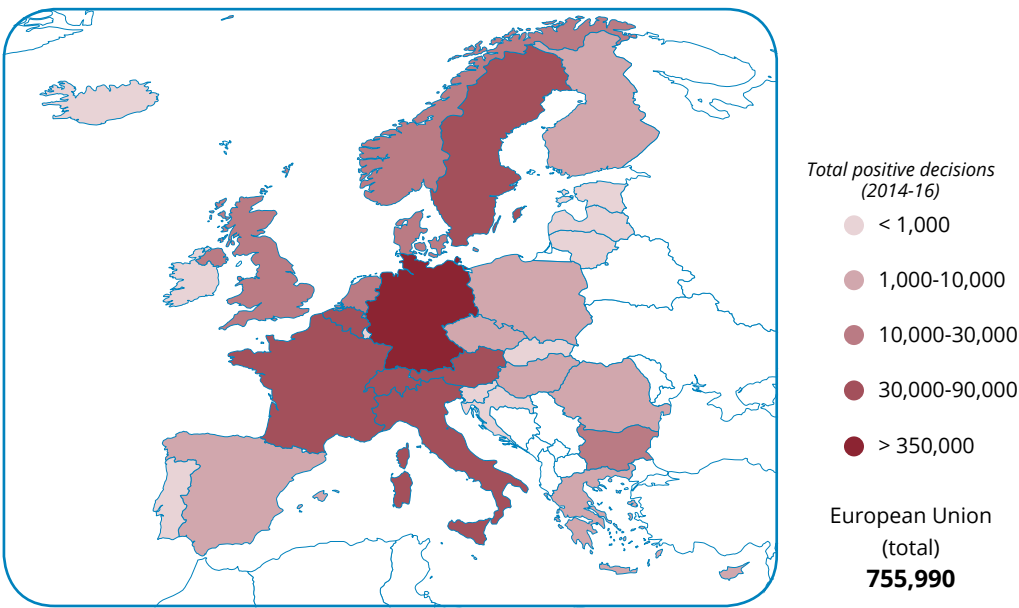
*The closure of the Balkans route that went from Turkey to Austria and Germany at the beginning of this year and the subsequent EU-Turkey deal significantly changed flows and policies: numbers coming to Europe dropped and tens of thousands remained “trapped” in Greece while the “crisis” seemed to gradually disappear from the news cycle. Meanwhile, for the third year in a row the Central Mediterranean route was the channel through which around 150,000 refugees, and to a larger extent economic migrants, arrived in Europe via Italy. Countries of origins are much more diverse and numerous than for the Balkans route and only a minority are clearly identified as refugees. Many “fall into the cracks” as they may flee for the same reasons as refugees but come from countries that are identified by border agencies and public opinion alike with economic migration. The consequence is that these people receive less than optimal protection while screening mechanisms are increasingly complicated. Ultimately, addressing the issues stemming from this route requires much more sophisticated policies.*

*Italy’s proposal of a “migration compact” last spring led to the approval by the EU Commission of a Communication that called for the establishment of Partnerships on migration combining sticks and carrots to stop migrations from Africa. While this aspect is certainly important, it is vital to implement the full spectrum of recommendations agreed between Europe and African countries in the Valletta Summit one year ago, including those on voluntary returns and the reduction of the costs of remittances.*

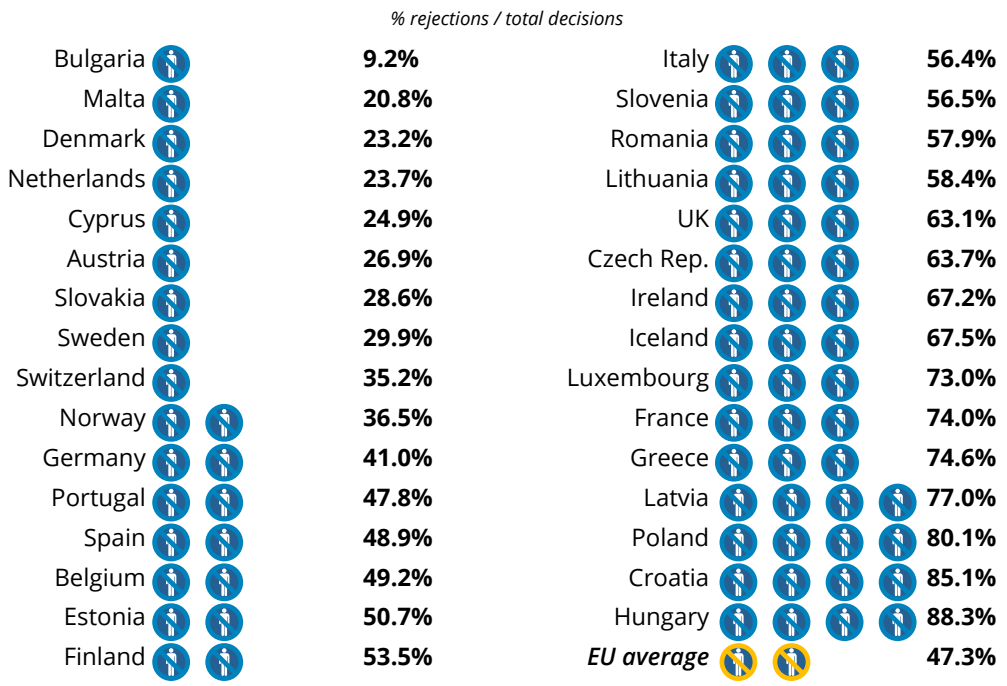
*Ultimately, policies should focus on demand and supply of illegal journeys to Europe rather than simply on the fight against smugglers. The risk is to make the same mistakes of the war on drugs which focused on drug dealers and often penalised consumers. To make these partnerships work effectively and to create the right incentives, the EU should allow for some circular migration to Europe and consider whether asylum applicants could be allowed to submit their requests without having to come all the way to Europe, often by illegal means.*

# WHERE MIGRANTS FIND ASYLUM

Positive decisions on asylum applications (total, 2014-2016)



## Rejection of asylum applications in the EU



# SYRIAN REFUGEE CRISIS: HEADING TOWARDS A BETTER REGIONAL MANAGEMENT

**F**ive years of war and uncertainty have taken a great toll on the lives of Syrians. According to the UNHCR, Syrians today make up by far the largest share of refugees worldwide (4.9 million). More than half of Syria's 22 million inhabitants prior to the war is currently displaced, within Syria or abroad. While around 850,000 Syrians have applied for asylum in EU countries between 2011 and September 2016, most of those who have fled Syria are still residing in neighboring states. According to recent estimates, 4.8 million Syrians are currently living in neighboring countries, with most of them residing in Turkey (2.7 million), Lebanon (1.1 million), and Jordan (640,000). In relative terms, the situation reaches a dramatic peak in Lebanon, where one in five persons living in the country today is a Syrian refugee.

The international community responded to the regional dimension of the Syrian crisis with the disbursement of over 16 billion US dollars between 2011 and 2015, of which 13 billion were channeled through the UN-coordinated Syria Regional Refugee and Resilience Plan. Despite this, commitments by international donors in 2015 met only about 60% of the total estimated funding needed to help neighboring countries cope with the emergency. Three of the top ten donors who most contributed to the Syrian crisis are Gulf countries: Kuwait, Saudi Arabia, and the United Arab Emirates. Also, around 80% of the multilateral aid was directed to Lebanon and Jordan, while the Turkish government benefited from the 2015 establishment of the Facility for Refugees in Turkey by the EU, but had to support a larger financial burden tapping its own resources.

Governments of countries with large Syrian refugee populations face a daunting task. Syrian refugees have now been away from their

homeland for three years on average, and in many instances their living standards are dire, as they settle in temporary settlements beset by overcrowding. According to the International Red Cross, Syrian refugees in Lebanon receive \$0.70 per day for food assistance, or almost three times below the UN's poverty line of US \$1.90. Similarly, in Jordan 86 percent of Syrian refugees are reported to be living below the poverty line.

Given all this, the international community, regional governments, and aid workers need to develop integrated plans not just for a short-term response. The most pressing needs are those concerning shelter, food, water, hygiene, electricity, and sanitation. But ensuring basic living standards is only the first step on the path to a sustainable integration of diaspora communities. Indeed, as the situations drags on, it is crucial to avoid to produce a "lost generation" of uneducated children. This is why investment in accelerated learning programs, non-formal education, and child protection programs are paramount.

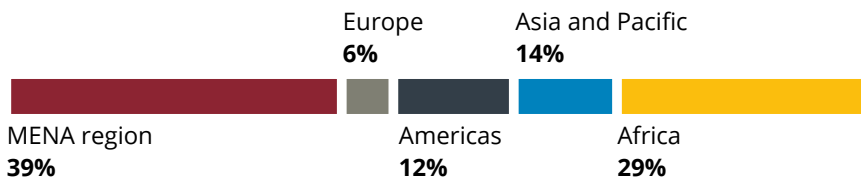
A second crucial target is the provision of direct support to the host communities. Indeed, along with governmental agencies, refugees are now supported by an intersectional web of social solidarity among populations residing in regions neighboring Syria that is as important as it is fragile.

The context in which each Middle Eastern government has to cope with the Syrian emergency is unique. However, as the evidence collects, the lessons learned become increasingly generalizable. Information exchange, cross-country inter-agency dialogue, and joint projects might be the next step to take to make the best use of scarce resources, ensuring that both Syrian refugees and their host communities can work together to overcome the crisis and start to build a better future.



# A WORLD OF REFUGEES

Where are the world's displaced people being hosted?



## Refugees by country of origin



in million

Syria	4.19	Congo, D.R.	0.54
Afghanistan	2.63	C.A.R.	0.47
Somalia	1.11	Myanmar	0.46
South Sudan	0.74	Eritrea	0.38
Sudan	0.64	Iraq	0.38

## Top hosting countries



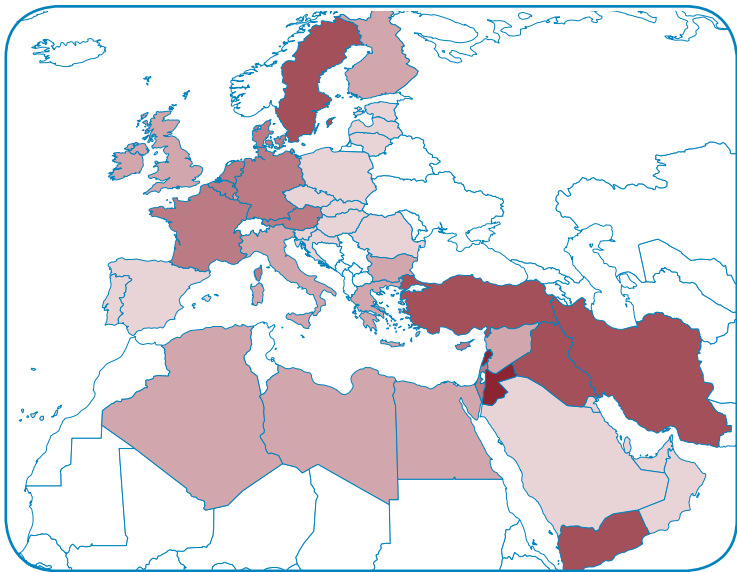
in million

Turkey	2.5	Iran	0.9
Pakistan	1.6	Ethiopia	0.7
Lebanon	1.1	Jordan	0.6

Year: 2015. Data: UNHCR

# REFRAMING THE CRISIS

## Share of refugees per total population



Refugees on population ratio

- <0.3%
- 0.3-1%
- 1-8%
- > 8%

Year: 2015. Data: UNHCR



## COPING WITH THE REGIONAL EFFECTS OF THE SYRIAN REFUGEE CRISIS



**Samir Aita**  
President, Circle of Arab Economists

*Dealing with the tremendous challenges posed by the Syrian refugee crisis means addressing the current situation and the future expectations of both the refugee population and the hosting communities. Regionally, most of the Syrian refugees are concentrated in neighboring areas that have historical and social ties with Syria, as well as economic relations with the country in the past.*

*Considering the number of Syrian refugees that are found today in local hosting communities, a medium- to long-term approach to the crisis would necessarily entail efforts for the recovery and reconstruction of Syria, as well as a shared vision at local level for future cross-border cooperation/partnerships.*

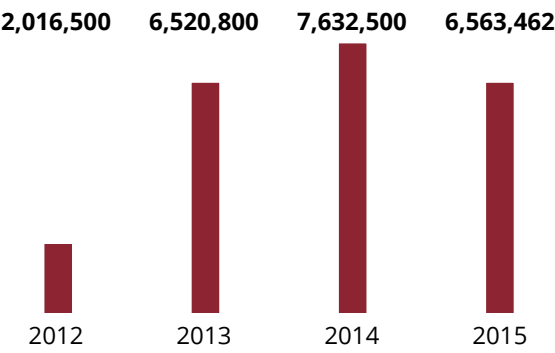
*In light of the scale of destruction caused by the Syrian war and the fact that the mechanisms of the Syrian economy have been largely dismantled, it is reasonable to expect that the return of the refugees would be gradual following a peace settlement. Priority actions should be geared towards coping with regional developmental challenges at the local level in Syria's neighboring countries, in order to reduce development gaps with other local areas, and addressing the needs of both refugee and hosting communities, notably in terms of infrastructures and public services.*

*Preeminence should also be attached to creating opportunities for skilled Syrian refugees who have fled to neighboring countries, so as to present alternative options to emigrating to Europe and elsewhere. In order to contrast the ongoing "brain-drain", employment opportunities should be made available to Syrian doctors and teachers to assist the refugees locally, and to engineers and small business owners to start developing SMEs which would contribute to the country's economic recovery.*

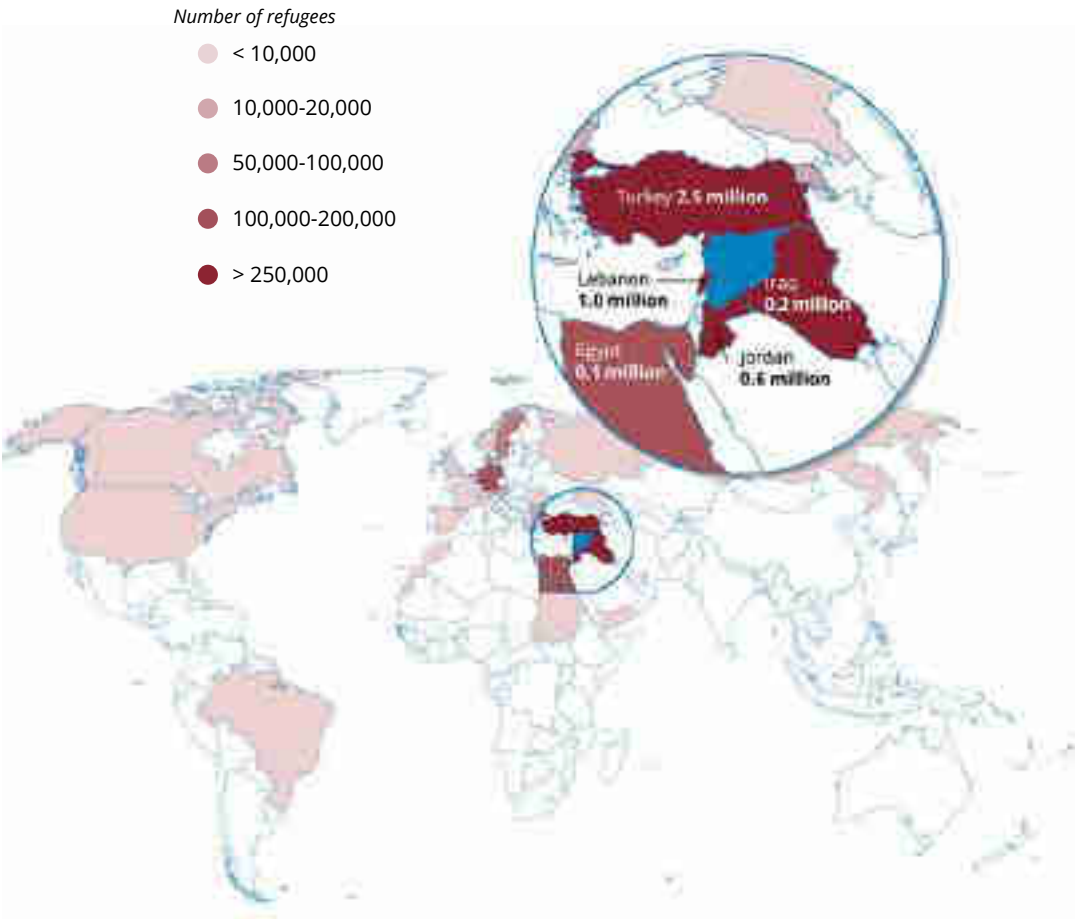
*Major changes in current policies are also needed, including decent working and business conditions for refugees and hosts alike, massive schooling and health service provisions, lifting financial sanctions punishing ordinary Syrians, empowering civil society organizations among the refugees, etc. Also, positive expectations should be created for the future, specifically through commitments to finance recovery and reconstruction efforts, as well as incentives for the return of refugees. In short, the best approach lies in thinking locally about the future, while acting at a global level.*

# SYRIANS: DISPLACED AT HOME AND ABROAD

Syrian internally displaced persons (2012-2015)



Syrian refugees by host country (2015)



# CIVIL SOCIETY AND CULTURE





# 4

## CIVIL SOCIETY AND CULTURE

- 80 Cultural Encounters: Reshaping EU-MED Relations
  - 84 Cultural and Religious Diversity: The Challenge of Pluralism
  - 88 How to Ensure Youth Inclusion in Political Transitions?
  - 92 Breaking the Glass Ceiling: Empowering Women to Empower Society
  - 96 Narrating the Other: How Do the Media Shape Perceptions?
-

# CULTURAL ENCOUNTERS: RESHAPING EU-MED RELATIONS

**O**ver the past years, the rise of international terrorism, political instability in the MENA region, and European concerns over growing migration waves from the Southern Mediterranean have largely marginalized the debate on the role of culture and cross-cultural encounters in Euro-Mediterranean relations. On both shores of the Basin, policy makers have prioritized cooperation and agreements over security, the fight against illegal migration and economic issues.

Nevertheless, there is increasing awareness among experts and policy makers that culture could make the difference in shaping the future of Euro-Mediterranean relations and should be put back on political agendas. Where cooperation over trade, security and migration has proven inadequate, culture may succeed in overcoming suspicion and misconceptions, fostering social cohesion and openness, and creating civil society and people-to-people linkages across and within the Mediterranean region.

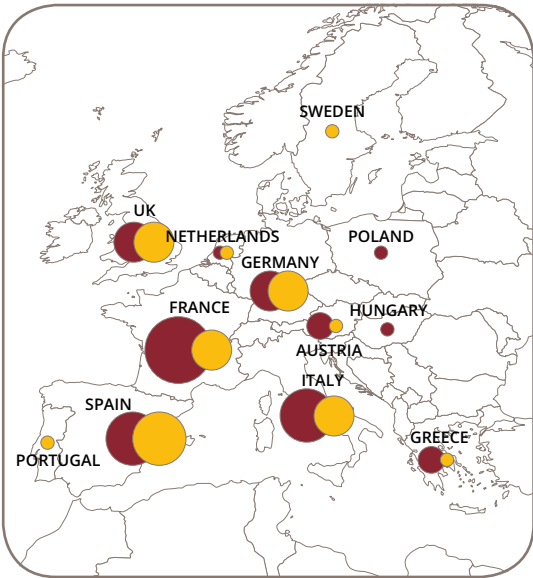
Several important regional integration projects with a focus on culture and education already exist. Just to name a few: evolving Erasmus programs that involve students and academics from Southern and Eastern Mediterranean countries; networks of Mediterranean universities; bilateral cooperation projects under the reviewed and culturally more aware European Neighborhood Policy (e.g. Med Culture; Drama, Diversity and Development; SouthMedCV; Investing in Culture & Art in the South Mediterranean; Eumed Connect and others); the creation of a specific “Euro-Mediterranean” institution for “Dialogue Between Cultures” such as the Anna Lindh Foundation; ad hoc initiatives such as festivals and fairs, as well as agreements on tourism and the media. However, with the MENA region threatened by increas-

ing instability and fragmentation on the one hand, and Europe suffering from a severe “existential crisis” on the other – both putting cross-cultural understanding on both shores through the difficult tests of fear, resentment and mistrust – it appears that more needs to be done in order to increase the cultural and socio-political impact of these endeavors, for the very benefit of Euro-Mediterranean relations. Indeed, the momentous changes underway in the Mediterranean today and the disruption of the apparently unshakable balances that marked governance and international relations in the region for decades may constitute a chance for policy makers on both shores to reshape Euro-Mediterranean cultural relations by integrating bilateral and top-down frameworks with deeper-rooted as well as more comprehensive and inclusive cultural strategies. All the more so since beyond all the turmoil, the violence and the authoritarian backlashes, a whole world of politically and culturally active civil societies and popular movements has emerged in the Arab world after 2011, seeking recognition, participation, and rights.

In particular, young generations are the new key actors who have come to the scene with their cultural interests and practices, giving both European and Mediterranean countries the opportunity to encourage and enable their cultural engagement and interactions so as to foster Euro-Mediterranean relations with a two-ways and bottom-up approach. In this context, investing on the cultural activities, exchanges and collaborations of sub-regional, locally rooted and even informal actors such as municipalities, schools, NGOs, online networks, urban musical scenes, publishing houses, authors, and artists could offer huge potentialities for cultural encounter, self-expression, and mutual knowledge across the “sea between the lands”.

# TOURISM AS AN ASSET

## European Union



Tourist arrivals  
*Thousands*

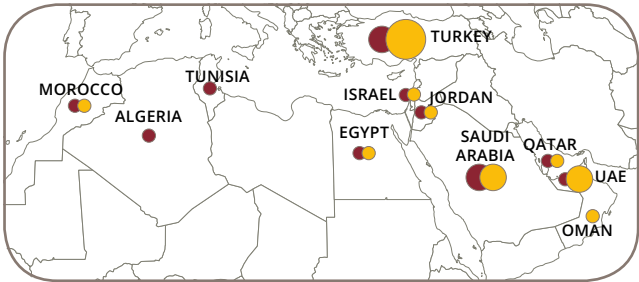
France	<b>83,701</b>
Spain	<b>68,215</b>
Italy	<b>50,732</b>
UK	<b>34,436</b>
Germany	<b>33,005</b>
Austria	<b>25,291</b>
Greece	<b>23,599</b>
Poland	<b>16,728</b>
Hungary	<b>14,316</b>
Netherlands	<b>13,926</b>



Tourism receipts  
*Million US dollars*

Spain	<b>56,525</b>
France	<b>45,920</b>
UK	<b>45,464</b>
Italy	<b>39,449</b>
Germany	<b>36,867</b>
Austria	<b>18,303</b>
Greece	<b>15,673</b>
Netherlands	<b>13,211</b>
Portugal	<b>12,606</b>
Sweden	<b>12,235</b>

## Middle East and North Africa



Tourist arrivals  
*Thousands*

Turkey	<b>39,478</b>	Tunisia	<b>5,359</b>
Saudi Arabia	<b>17,994</b>	Jordan	<b>3,990</b>
Morocco	<b>10,177</b>	Qatar	<b>2,930</b>
UAE	<b>9,990</b>	Israel	<b>2,800</b>
Egypt	<b>9,139</b>	Algeria	<b>1,710</b>



Tourist receipts  
*Million US dollars*

Turkey	<b>26,616</b>	Morocco	<b>6,003</b>
UAE	<b>16,038</b>	Israel	<b>5,365</b>
Saudi Arabia	<b>10,130</b>	Qatar	<b>5,035</b>
Lebanon	<b>6,857</b>	Jordan	<b>4,065</b>
Egypt	<b>6,065</b>	Oman	<b>1,540</b>



## FEEDING CULTURE FROM BELOW



**Claire Spencer**

Senior Research Fellow, Middle East and North Africa  
Programme & Second Century Initiative, Chatham House

*As a symbolic space for cultural exchange across borders, the Mediterranean has undergone strains in recent years, but is also witnessing a resurgence in often unexpected quarters. On the official side, the EU's European Neighborhood Policy review of 2015 provides for more European students taking courses in the Arab world, as well as access for southern neighborhood students to the EU's Erasmus program. The Anna Lindh Foundation and British Council are also expanding their youth debating program, "Young Arab Voices",<sup>6</sup> to include European youth to become a 42-nation consort of "Young Mediterranean Voices". Youth, as a symbol of the future, has become almost synonymous with culture and civil society activism.*

*Almost simultaneously, however, the Mediterranean Sea has come to symbolize humanitarian disasters and rejection of the other. In the waves of refugees and migrants undertaking often life-threatening sea voyages to reach Europe from the wider Middle East and Africa, over 3,600 were reported drowned or missing this year by the International Organization for Migration in October 2016.<sup>7</sup> The quest for greater understanding of the other has been marred by the images of human suffering at the heart of the Mediterranean, whilst also putting Europe's liberal values to the test. Europeans have rescued many of those at risk, but have also struggled to fulfil their collective obligations to refugees arriving in such unprecedentedly high numbers.*

*What used to be an officially-led mission to share the benefits of Europe's insights into multicultural acceptance and integration has been taken up by "cultural innovators" (including a network of the name <https://www.culturalinnovators.org/>). Using civic activism, art, music, film and new creative spaces – above all on-line – they jointly explore socio-cultural identities facing challenges on both sides of the Mediterranean. In times of austerity, these collaborations are as innovative and devolved as their output, arising from networks of individuals rather than institutions identifying creative partners, funding and resources. The flourishing of the Arab film industry since 2011 bears witness to this, above all: with no official funding, for example, a new range of Tunisian films has succeeded in winning international recognition, as well as breaking more cultural taboos and stereotypes than formal processes of dialogue achieve.<sup>8</sup>*



# CULTURAL EXCHANGES ACROSS THE MEDITERRANEAN

## Tertiary students moving from the MENA region to the EU

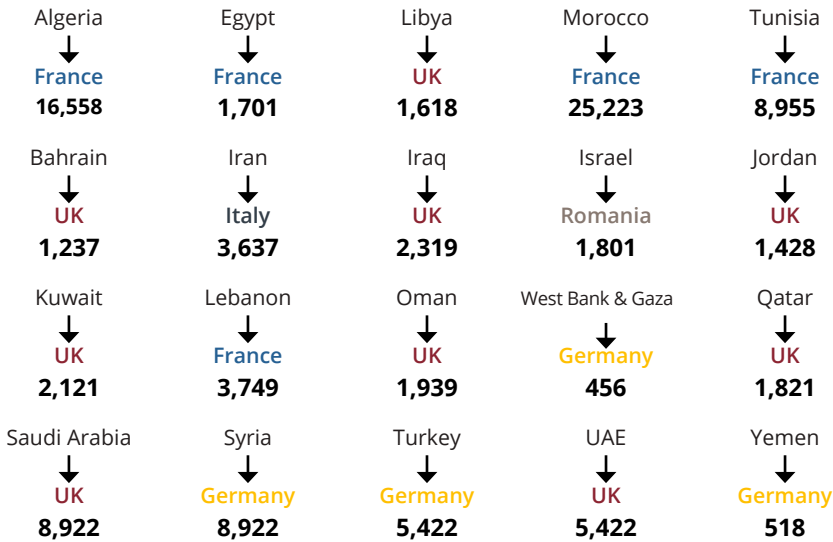


Morocco <b>31,256</b>	Saudi Arabia <b>11,173</b>	Iraq <b>3,791</b>	Oman <b>2,116</b>
Turkey <b>21,504</b>	Israel <b>7,091</b>	UAE <b>3,772</b>	Qatar <b>1,921</b>
Algeria <b>17,548</b>	Lebanon <b>6,467</b>	Jordan <b>2,846</b>	West Bank & Gaza <b>1,358</b>
Iran <b>15,865</b>	Egypt <b>5,865</b>	Kuwait <b>2,719</b>	Bahrain <b>1,318</b>
Tunisia <b>13,607</b>	Syria <b>4,505</b>	Libya <b>2,460</b>	Yemen <b>928</b>

Year: 2015. Data: UNESCO

## GOING WHERE?

First EU country of destination for tertiary students from different MENA countries



Year: 2015. Data: UNESCO

# CULTURAL AND RELIGIOUS DIVERSITY: THE CHALLENGE OF PLURALISM

**I**n an era of increasing migrations across the Mediterranean, widespread instability in the MENA region, and radicalization trends on top of long-term globalization processes, the engagement with cultural and religious diversity has become a key challenge for governments, policy makers and whole societies on both shores of the Basin. In Europe and in Southern and Eastern Mediterranean countries, the very future of pluralism is at stake.

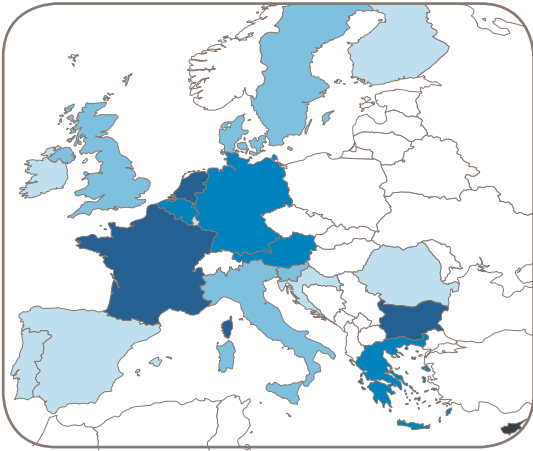
Although the MENA region has always been a mosaic of ethnic and religious communities, this diversity has been systematically silenced through exclusionary processes of nation-building and authoritarian, often secular rule on the one hand, or crystallized by communalism on the other. For decades, regimes throughout the Middle East have subordinated – as some are still doing today – cultural and religious differences to their own interests, by manipulating and blackmailing communities and minorities in order to extort their allegiance in exchange for advantages or protection. Consequently, after the regime changes in recent years, diversity has started to reemerge in a conflictual and “sectarian” manner. While in some cases the political transitions in the MENA region may have opened up new opportunities for freedom of opinion, in most countries they have also uncovered ethnic and religious divisions as well as competition between groups and sects and have rarely coincided with an increase in religious freedom. Additionally, growing instability, the emergence of exclusivist and radical religious groups like Daesh, faith-based politics and the fragmentation of states along sectarian lines have exposed more vulnerable minorities to serious existential threats, resulting in displacement and emigration at best, death or even genocide at worst.

At the same time, in a Eurozone weakened by the economic crisis and haunted by the specter of terrorism, increasing immigration – and the resulting cultural and religious diversification of societies – has been accompanied by the rising fear of populations for their well-being and social benefits and, above all, by the reemergence of ethno-nationalist feelings and political trends that explicitly oppose pluralism. Populist movements are managing to assert themselves on the political scene all over the continent by feeding – and exploiting at the same time – fear and uncertainty: to this aim, they methodically depict newcomers and the cultural and religious diversity they bring to society as a major threat to social cohesion, secularism and welfare, and even blame them for the decline of an allegedly pure and homogeneous “European civilization”. In this context, the spread of jihadi terrorism to Europe in recent years and its claim to represent “true” Islam as the absolute opposite to “Western values”, has further influenced and blurred the common perception of diversity – and above all of Islam in Europe – through fear and intimidation: the “Other” is increasingly perceived not only as a root-cause of Europe’s economic and social difficulties, but also as someone colluded in the threat to security and peace by the simple fact of being “different”.

Although both Europe and Mediterranean societies have experimented the management of cultural and religious diversity in a number of different ways throughout their history, the threat posed by the politicization and manipulation of diversity is still far from eradicated. As new – and ill-intentioned – actors have emerged to the forefront in the race for power on both shores of the basin, the challenge of pluralism becomes a key priority, and an inescapable one as well.

# THE CHALLENGE OF PLURALISM

## Total Muslim population in Europe



Muslim population (% of total population)



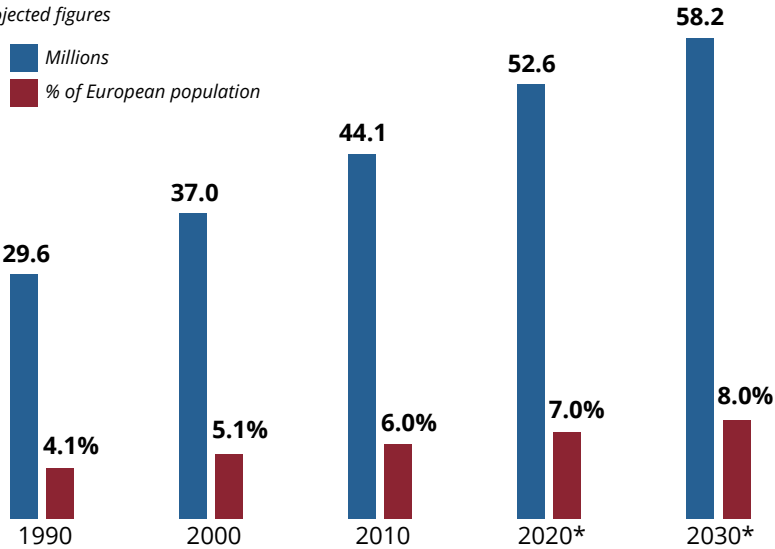
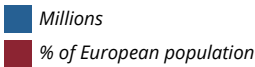
Muslim population  
number of people

Germany	4,760,000	Sweden	430,000
France	4,710,000	Cyprus	280,000
UK	2,960,000	Denmark	230,000
Italy	2,220,000	Romania	70,000
Bulgaria	1,020,000	Slovenia	70,000
Netherlands	1,000,000	Croatia	60,000
Spain	980,000	Ireland	50,000
Belgium	630,000	Finland	40,000
Greece	610,000	Portugal	30,000
Austria	450,000	Luxembourg	10,000

Year: 2010. Data: Pew Research Center

## Muslims in Europe

\*Projected figures



Year: 2010. Data: Pew Research Center



## MANAGING DIVERSITY IN THE MENA REGION



**Georges Fahmi**

Research Fellow, Middle East Directions Programme,  
Robert Schuman Centre for Advanced Studies,  
European University Institute (EUI)

*Managing cultural and religious diversities has gradually turned into a major challenge for the MENA region. Historically, broad cultural and religious diversity has been tackled through two opposite models: 1) the suppression of religious and ethnic sub-identities in favor of one Arab national identity (Syria; Iraq before 2003, and to a lesser degree, Egypt); or, 2) the institutionalization of diversity (Lebanon; Iraq after 2003), with religious and ethnic groups establishing their own parties and competing for political power.*

*The wave of Arab revolutions has shown that both models have failed to guarantee pluralism. Suppression has only led to further fragmentation of societies, while institutionalization of the various religious and ethnic communities has led to the creation of new centers of power that do not necessarily represent the interests of such communities and pose a major challenge to national cohesion.*

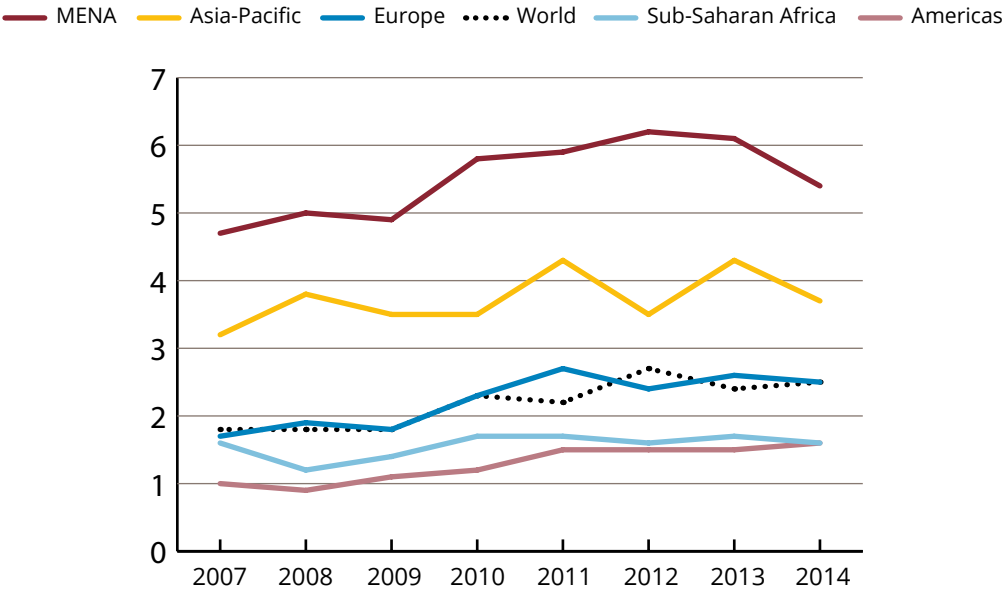
*In order to deal with these challenges, a positive agenda might include the following:*

- *Managing diversity is a political challenge, not a cultural or a religious one, and hence it should be primarily addressed through state policies. These policies should be based on two elements: enforcing religious and cultural rights for all citizens, and broadening the instruments of local governance to allow religious and ethnic groups to be part of the decision-making process.*
- *The role of civil society should go beyond offering support to disadvantaged communities, and should suggest positive policies and lobby to enforce them.*
- *MENA states should engage in national dialogues to redefine their conception of national identity so as to include religious and ethnic identities, considering them an enrichment rather than a threat. This measure should be followed by other consolidating policies such as educational reforms.*
- *Unlike the models adopted in Lebanon and Iraq, managing diversity should seek to govern the relation between equal citizens who adhere to different religious and ethnic groups, and not only to managing the relations between the leaders of those religious and ethnic communities.*
- *In situations of armed conflict, as is the case in Syria and Yemen, agreeing on rules to manage diversity is an important step towards national reconciliation.*

# HOW IS RELIGION PERCEIVED?

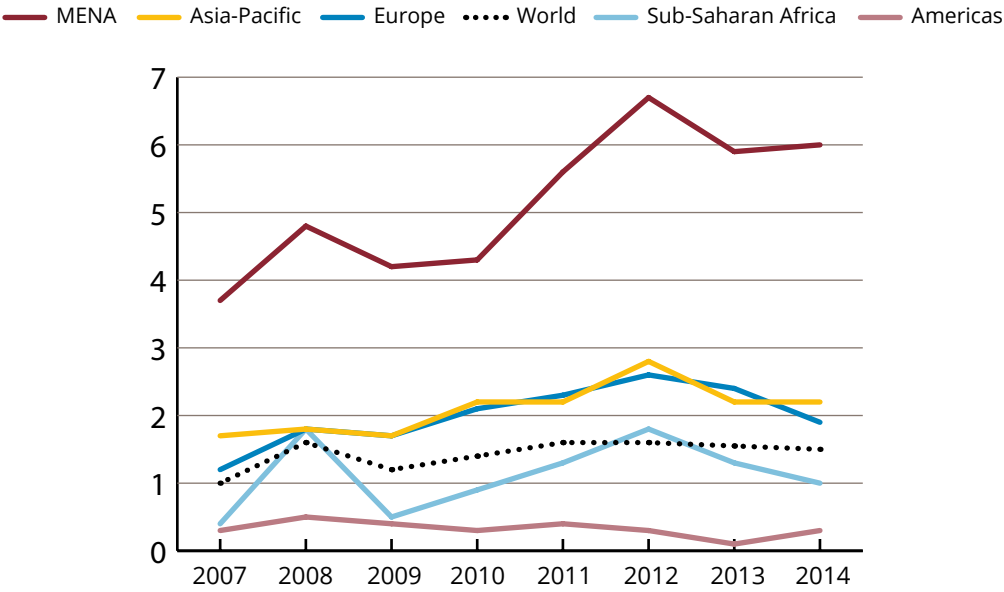
## Level of government restrictions on religion

(median scores for each world region)



## Level of social hostilities involving religion

(median scores for each world region)



# HOW TO ENSURE YOUTH INCLUSION IN POLITICAL TRANSITIONS?

**H**ow do we define youth? If we rely upon age groupings, youth is normally defined as the 15-29 year old group. But

if we go beyond statistical purposes, we can adopt a more socially-constructed definition of youth as the “period of transition into adulthood” (Dhillon et al., 2009). Expanding on that definition, we find that a growing number of young people both in the EU and the MENA region perceive themselves as belonging to the “generation of waithood” (Singerman 2008), feeling trapped in a prolonged status of suspension between childhood and adulthood. When the chain of education, employment and family formation that makes possible the transition from childhood to adulthood breaks, the transition stalls: thus among the youth, who feel trapped in a sort of limbo, a social malaise erupts. The result can be frustration and therefore protest, either in the form of popular demonstrations or in the (extreme) form of radicalization.

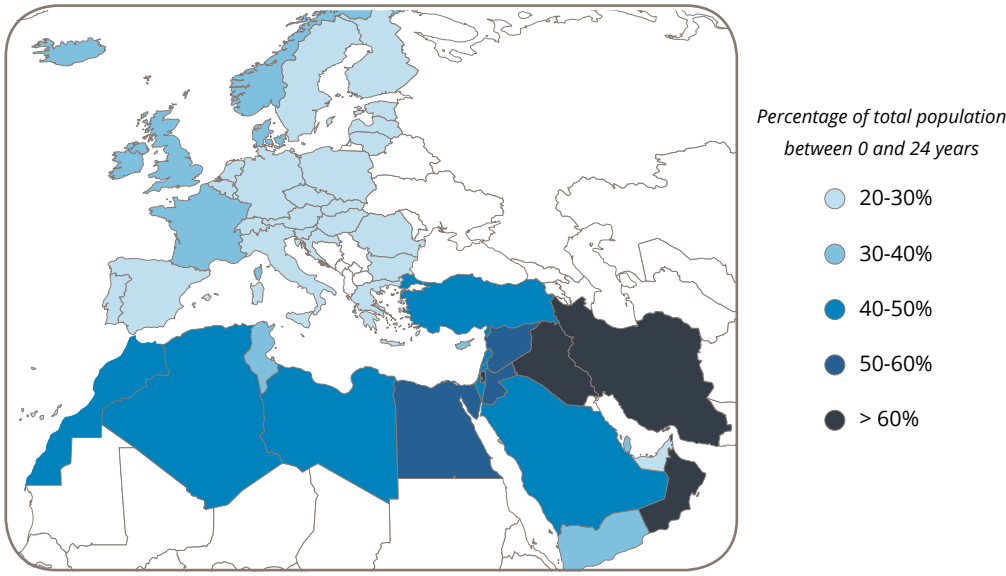
Indeed, youth were among the main actors in the Arab uprisings of 2010-2011, which were driven by both socio-economic and political grievances. An increasing number of young people (between 40 and 60 percent of people living in the MENA region are under 24 years of age) feeling frustrated and disenfranchised took to the streets demanding “dignity” (*karama*), but also “bread, freedom, and social justice” (*‘aysh, hurriya, ‘adala ijtima’iyya*), as was the case in Egypt. Far from being apathetic and disengaged from politics – as they were often characterized in the media – the Arab youth acted as an agent for change by engaging in different forms of activism, both at the individual and the collective level. Some of them joined opposition political movements, often under the Islamist umbrella, others engaged in volunteer work and social entrepreneurship. Not all of them acted for the over-

throw of the existing political system: many adopted a form of “subversive accommodation” (Herrera & Bayat, 2010) stance by choosing to operate within the system while at the same time trying to redefine and subvert the existing constraints.

Five years later, not all of their aspirations and political demands have been met. The extent of their success varies from country to country. However, from a general point of view, at the political level the youth remain largely under-represented in post-revolutionary political systems. Tunisia seems to be the only exception, with a percentage of 6.5 percent Members of Parliament (MPs) who are under the age of thirty, a percentage similar to the one registered in some European countries like Italy and Denmark and two times that of the United Kingdom. Elsewhere the youth’s requests for more inclusion have remained largely unfulfilled, fostering that sense of frustration and disenfranchisement that led to the revolts. Economy, too, has remained an area of limited progress. Aggravating factors such as political unpredictability and turmoil worsened the conditions for investment, leading to a rise in the already high youth unemployment rate. Between 2012 and 2014, the MENA region saw an increase in the youth unemployment rate, in contrast to the global trends: in Tunisia, which is often cited as the only success-story of the Arab revolts, it stands at 30 percent.

Nevertheless, the seeds of change have been planted. Young people demonstrated that they are an agent rather than an object of political change, by articulating their grievances and aspirations in a wealth of meaningful ways. Turning grievances into opportunities will be key to foster true engagement and to prevent dramatic consequences such as alienation and, ultimately, radicalization.

# THE GENERATIONAL DIVIDE BETWEEN NORTH AND SOUTH

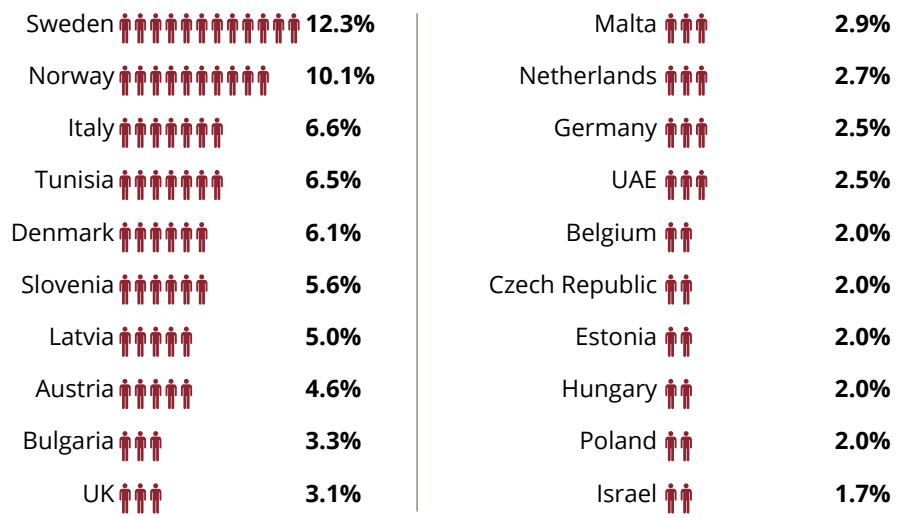


Year: 2014. Data: ILO

## YOUTH PARTICIPATION: UNDERREPRESENTED?

Percentage of under-30 parliamentarians

first 20 countries in Europe and the MENA region



Year: 2016. Data: IPU



## NO INCLUSION WITHOUT INTRUSION IN THE MINDSET



**Dina Fakoussa**

Head of Middle East and North Africa Program,  
German Council on Foreign Relations (DGAP)

*Youth in the MENA region have largely turned their back on formal political life. The decline in the euphoria sparked by the uprisings in 2010 and 2011 can be attributed to one core reason: a sense of marginalization and political impotence due to elitist, non-pluralistic politics (to varying degrees depending on each country) designed mainly by older generations of policy-makers detached from the reality and the needs of the younger elements of society. Paternalism and patriarchal structures, which together with autocratic rule form two sides of the same coin, are major obstacles to a meaningful role of the youth in politics.*

*This state of mind – which is also prevalent among self-proclaimed liberal officials, politicians and other progressive actors of society – requires urgent rethinking. International actors should work towards this end by targeting the youth more comprehensively: they should foster a culture of critical thinking in education, enhance soft skills, increase capacities in specific areas of knowledge in order to strengthen young people's credibility and professionalism to assert themselves in the eyes of older generations. In this sense neglected areas, particularly rural ones, are in dire need of attention.*

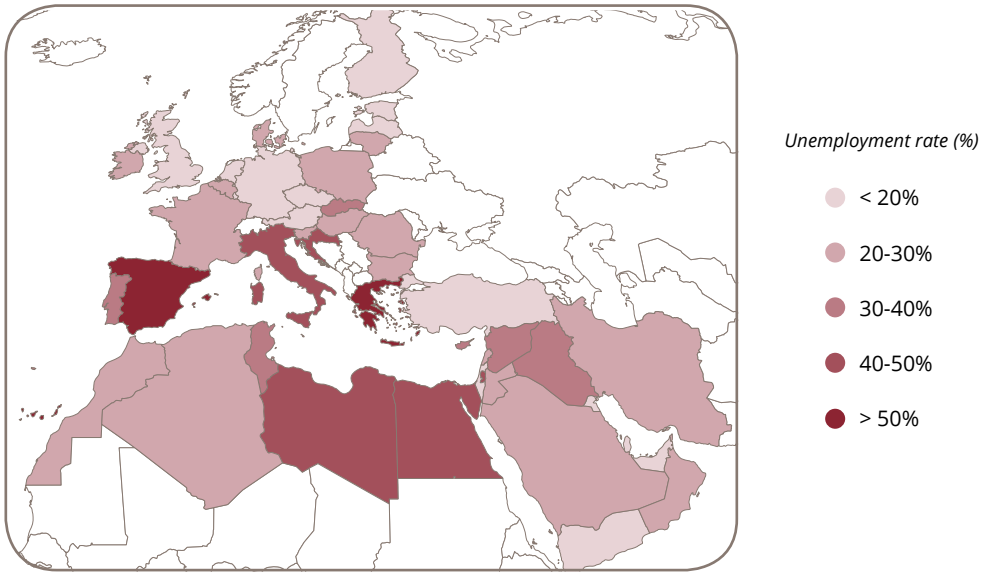
*The international community should support the creation of fora where young and midlevel professionals come together with national decision-makers and other leading political and economic figures to share their visions and ideas. Whether through crowdsourcing or youth engagement in parliamentary committees in countries where Parliaments exercise power, there are numerous modern and classic channels to make their voices heard. Western actors should jointly and whole-heartedly apply conditionality where genuine inclusion in general and youth inclusion in particular is absent and provide incentives of critical magnitude for youth involvement. State-sponsored youth inclusion policies and cosmetic measures that foresee the participation of obedient, patriotic young people only are to be dispensed with altogether.*

*To be sure, more genuine inclusion of young people in the region might not necessarily translate into more voices tilting the balance in society towards social and political liberalism. Many young people nurture aspirations of state-society relations that might appear somewhat illiberal by Western standards. But in an open participatory political environment these ideas can be expressed, tested, and possibly discarded – a process much healthier than pushing young people into the arms of extremists because of a sense of powerlessness.*



# A COMMON WORRY

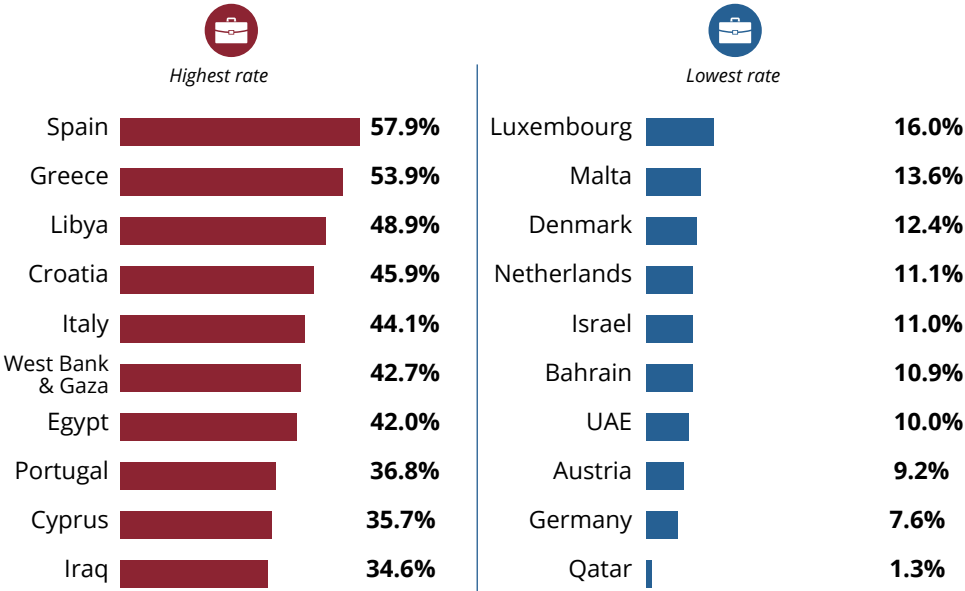
Youth unemployment (% of total labor force aged 15-24)



Year: 2014. Data: ILO

## AN INTRA-REGIONAL DIVIDE

Highest and lowest rates of youth unemployment in EU and MENA countries



Year: 2014. Data: ILO

# BREAKING THE GLASS CEILING: EMPOWERING WOMEN TO EMPOWER SOCIETY

**A**ll things held equal, with current trends, a baby girl born today will see the global gender gap in health, education, economic opportunity and politics close completely around the world if she lives to 83, exactly her statistical lifetime. This is what emerges in the World Economic Forum's 2016 Global Gender Gap Report. While European Nordic countries (namely Iceland, Finland, Norway, and Sweden) dominate the global ranking, in Southern Europe as well as in the MENA region women still experience the constant feeling of being trapped beneath a glass ceiling. The invisible barrier encompasses both the socio-economic and the political fields.

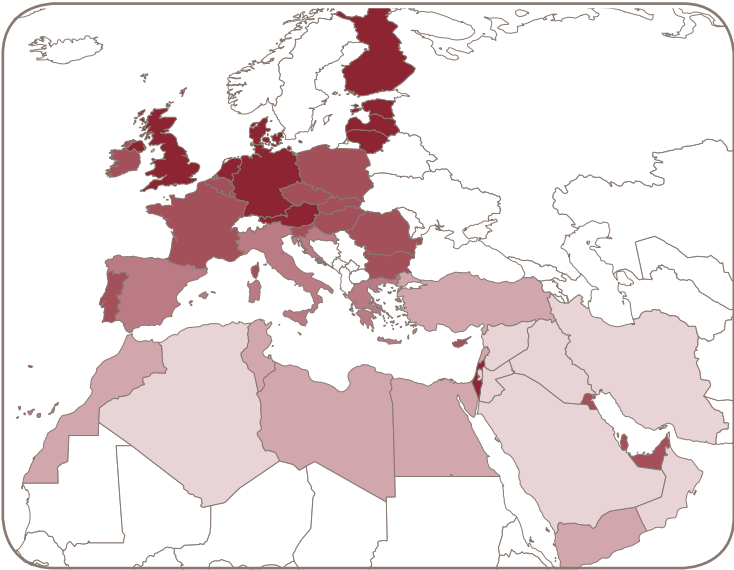
When looking at worldwide socio-economic indicators, there is a puzzling inverse relation between education and employment. Tertiary education enrollment rates for girls in most countries of both the EU and the MENA region are higher than those for their male counterparts. Still, when looking at employment rates by sex, the opposite is true. Such a paradox of high educational scores and low employment for women can be linked to various factors, among them the ineffectiveness of welfare systems - which make it extremely difficult for a woman to balance family and work responsibilities - and the influence of gender stereotypes in education, which affect women's concentration in the social sciences and the humanities, relegating them to a "saturated" labor market. For the MENA region in particular, the disheartening and paradoxical truth is that, even when studying scientific subjects, in an economy heavily reliant on cheap and unskilled labor, it is precisely women's higher education that negatively affects their chances of employability. As far as women's participation in the political process is concerned, there are peaks and troughs.

Women in the MENA region took part in the uprisings of the Arab Spring advocating for reforms but, for the most part, their participation did not translate into their full involvement in the political transitions that took place after the uprisings. However, it should be emphasized that on the whole, the regional average for women's representation in Parliament has increased since the beginning of the Arab uprisings. Today, Algeria has the highest percentage of women in Parliament (31.6 percent), followed by Tunisia with 68 women Members of Parliament (31.3 percent). These numbers are not far from those of European countries. Indeed, in the European Parliament, women account for 37 percent of seats compared to 63 percent for men. Sadly, the situation is quite uneven: in Europe the figures range from Sweden's 43.6 per cent to Hungary's 10.1 percent, while in the MENA region Algeria's record is balanced out by Oman's 1.2 percent.

However, women are pushing back, both in the EU and in the MENA region. In Europe they are fighting a battle against the cultural taboo that prevents them from fully participating in the economic and political process. In the MENA region, they do not surrender to adverse circumstances. In Iraq, women's civil society groups help women rescued from Daesh's territories return to normal life. Women activists are also instrumental in providing care for those in refugee camps, especially women and children. Empowering women in both the political and socio-economical realms means increasing their bargaining power. When women and men have equal chances to be socially and politically active and to influence laws and policymaking, institutions and policies are more likely to be fair and representative of society as a whole.

# EMPOWERING WOMEN IN THE LABOUR MARKET



## Female employment to population ratio



Year: ILO. Data: 2016

# NOT SO EQUAL

## Gender Parity Index for gross enrollment ratio in primary education

			
Kuwait	1.063	Syria	0.987
West Bank & Gaza	1.056	Turkey	0.977
UAE	1.042	Oman	0.969
Iran	1.022	Lebanon	0.951
Jordan	1.016	Qatar	0.927
Israel	1.009	Morocco	0.913
Tunisia	1.009	Saudi Arabia	0.876
Egypt	0.996	Yemen	0.790
Algeria	0.991		

Year: 2014 or latest. Data: World Bank



## LESSONS FROM THE TUNISIAN EXPERIENCE



**Wided Bouchamaoui**

President of UTICA, Nobel Peace Prize 2015

*In the early 20th century the great Tunisian thinker Tahar Haddad said that women account for half of our society. The prominent Saudi thinker Cheikh Abdelaziz Ibn Bazy took this concept one step further and declared that “women represent half of our community, while they educate the other half. Thus, in many ways, they make up our entire community.” Finally, the great Grandi noted that “calling women ‘the weaker sex’ is outright slander. If non-violence is the law of humanity, the future belongs to women”. These words by men of different origins and cultural backgrounds perfectly sum up the role of women in the Arab and Muslim societies and their evident impact on the development of whole generations.*

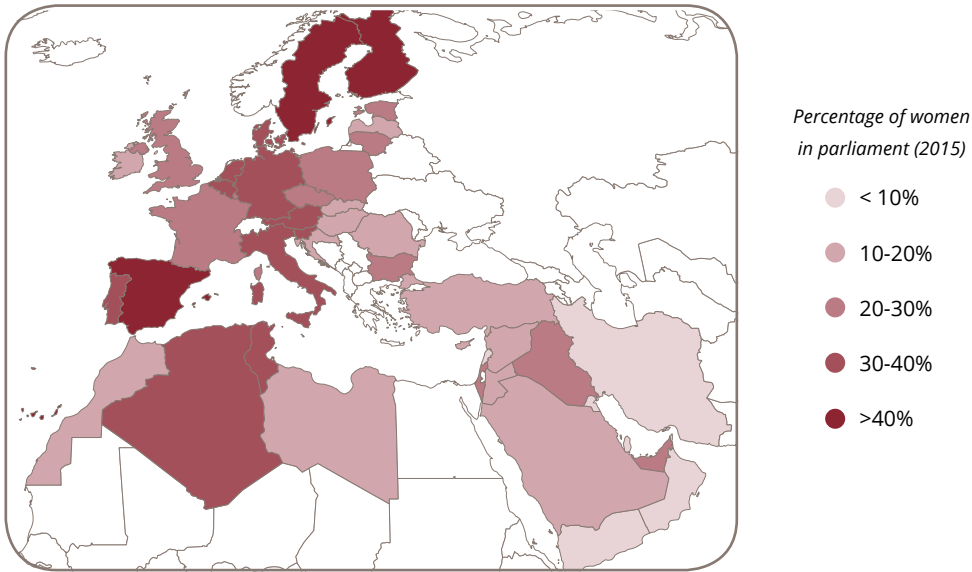
*Tunisia has been lucky enough to have Habib Bourguiba as the firm leader of a national struggle for independence and the founder of the modern Tunisian State. Women figured prominently on his agenda since the late Fifties and the famous Code of Personal Status that he issued in a rather conservative society. He eventually succeeded in his fight for equality with the generalization of learning that he pursued with determination, for the recognition of women as vital contributors to the political, economic, and social life and a balancing factor in society as a whole.*

*Since that time, women have increasingly accessed those spheres that were once traditionally reserved to men. In Tunisia his ground-breaking vision functioned as a springboard for the rise of women in the centers of power on a par with men, in spite of some lingering resistance. The Tunisian experience – that was unheard of at the time and thus vehemently opposed – inspired feminist movements also in other Arab and Muslim countries. Without this legacy, I would never have had the privilege, the opportunity, and the honor – as a woman – to walk down a path that makes me proud, as it does the vast majority of women in my country.*

*With the revolution of 14 January 2011, Tunisian women have shown to the world that a fierce battle is afoot to preserve this legacy and to defend the project of a modernist society in which they are key players. Women’s active participation in all the phases of the political transition in Tunisia as well as their role within the Assembly of the Representatives of the People, in subsequent governments, and more generally in civil society, remain the strongest bulwark against obscurantism and extremism, regardless of their origin.*

# EMPOWERING WOMEN IN POLITICS





## Percentage of women in national parliaments



Year: 2016. Data: IPU

# STILL A LONG WAY TO GO

## Literacy rate for young men and women

	 men	 women		 men	 women
Algeria	94.4%	89.1%	Morocco	88.8%	74.0%
Bahrain	98.6%	97.6%	Oman	99.1%	99.1%
Egypt	93.6%	90.3%	West Bank & Gaza	99.3%	99.2%
Iran	98.3%	97.7%	Qatar	98.4%	99.6%
Iraq	83.3%	80.6%	Saudi Arabia	99.3%	99.1%
Israel	99.7%	99.4%	Syria	96.8%	94.9%
Jordan	99.0%	99.2%	Tunisia	98.2%	96.3%
Kuwait	98.7%	99.0%	Turkey	99.7%	98.7%
Lebanon	98.4%	99.1%	UAE	93.6%	97.0%
Libya	100.0%	99.9%	Yemen	97.0%	79.5%

Year: 2016. Data: World Bank

# NARRATING THE OTHER: HOW DO THE MEDIA SHAPE PERCEPTIONS?

**T**echnological advances and globalization have exposed a growing number of individuals across the world to a pervasive and diversified media environment that holds an increasingly dominant place in disseminating information, forming attitudes, promoting values, hierarchies and social norms, motivating judgment and behavior, as well as influencing public opinion and mobilizing citizens. If on the one hand the intensifying stream of data, information and ideas may be considered as a fundamental asset to gain knowledge and form more objective, balanced and well-founded opinions, on the other hand the media remain highly susceptible of contributing to the formation of stereotypes, distortions or divisive partisanship. Both in Europe and in Mediterranean countries, the latter tendency has become particularly evident in recent years with regard to the question of how the media and their narratives shape our perception of the “Other”: most manifestly in the case of migrants (the bearers of a cultural or religious “otherness”) in Europe; and in the case of political – or religious – competitors in the post-revolutionary contest for recognition, visibility or influence throughout the MENA region.

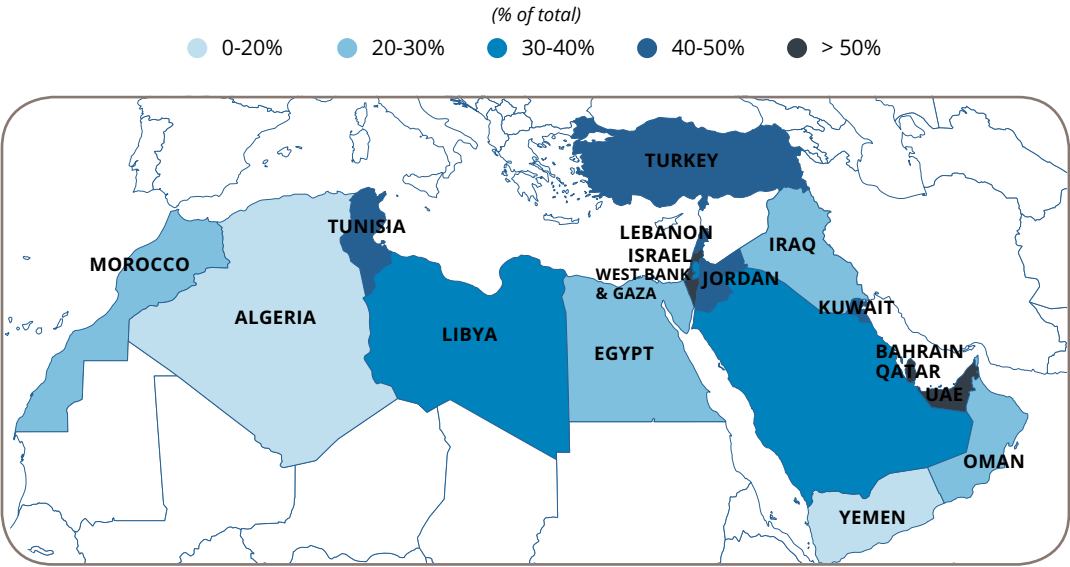
With regard to the coverage of the migration and refugee crisis, experts and international organizations have reported that – indeed with notable exceptions and approaches that vary from country to country – many European mainstream media have often tended to increase negative stereotypes and public anxiety about immigration in recent years, while crowding out alternative narratives of common interests and cultural interaction between north and south, as well as between native citizens and new-coming “others”. A media discourse often

dominated by sensationalism has led to an increased use of hyperbole and distortion (for example “invasion”, “swarms” or simply “illegals” when speaking of migrants) as well as a disproportionately high visibility of hate speech and anti-migrant or anti-Muslim statements by some political leaders.

When looking at the other shore of the Mediterranean, in the aftermath of the so-called “Arab Springs” the diversification of the media landscape throughout the MENA region has quickly turned into an intensely polarized and partisan environment that, although with notable exceptions, has aggravated existing political as well as sectarian divisions (e.g. Islamists vs non-Islamists; Sunni vs Shia; majority religions vs minorities), also by stereotyping, underrepresenting or indeed silencing the respective political or religious “others”. The levels of media freedom are still low and national broadcast media systems have in many cases remained uncritically loyal to alternating regimes and governments. At the same time, the alleged democratic potential of the increasingly penetrating internet and social media in the region – +17 percent and +13 percent respectively in one year – is often contradicted by their tendency to favor the creation of relatively closed clusters of like-minded individuals, to amplify extreme voices and mobilize resentment against “others” and political adversaries, especially in the tense, unstable and fragmented environment that characterizes several MENA countries today. On both shores of the Mediterranean, the “Other” has emerged in full force and plurality in recent years: and so has the challenge of living together in increasingly diverse societies. Whether or not the media will prove able to rise up to this challenge remains a pressing, and open, question.

# SURFING MED

## Population with a social media account



Year: 2015. Data: We are Social

## A MOBILE POPULATION

### Mobile devices per inhabitant



KUWAIT 2.12	Tunisia 1.27
Bahrain 1.93	Egypt 1.15
Saudi Arabia 1.88	Algeria 1.02
Oman 1.74	Iraq 1.02
UAE 1.63	Qatar 0.97
Libya 1.5	Lebanon 0.94
Jordan 1.29	Turkey 0.85
Morocco 1.29	West Bank & Gaza 0.79
Iran 1.27	Yemen 0.61
Israel 1.27	Syria 0.59

### Share of web traffic on mobiles and tablets



(% on total web traffic)

KUWAIT 19%	Jordan 6%
Saudi Arabia 18%	Syria 5%
Bahrain 11%	Israel 4%
Lebanon 11%	Turkey 4%
Libya 11%	Egypt 3%
Oman 11%	Morocco 3%
Qatar 10%	West Bank & Gaza 3%
UAE 10%	Tunisia 3%
Iraq 9%	Yemen 3%
Iran 7%	Algeria 2%

Year: 2015. Data: We are Social



## REACH OUT AND LISTEN: CHANGING NARRATIVES FOR A NEW AGENDA IN THE MEDITERRANEAN



**Monica Maggioni**  
President, RAI

*War and instability in the Mediterranean area provide a new narrative space that questions our ability to reform communication between the northern and the southern shore.*

*Traditional media can do a lot, with an accurate and fair coverage of migration: appointing a Special Correspondent, grounding reports on facts, correct figures and human rights law. Reporters should oppose fear mongering and hate speech, avoiding political bias and stereotyping. In dealing with conflicts, a firm grasp of the causes of events and their deep roots in history is necessary. We must know who the players are and what their game is.*

*But there is more. We need a new approach to develop extensive reach across borders. The geopolitical context is changing very rapidly. Observers from the western world would better shed their assumptions and preconceptions and stop preaching at audiences in the Middle East and the Maghreb.*

*Instead, every opportunity to meet and discuss a common perspective must be seized. Professionals responsible for editorial choices must make a joint effort to develop new narratives and get involved in a network, sharing daily work and training to shape a positive agenda for the future.*

*This vision will be vain if we do not connect with a wider and different audience.*

*Our objective is to reach out to the people who are left out of the picture, both in our cities and in other countries. We need to talk to the young rebels on the outskirts of European cities and the disenfranchised in north African peripheries. Above all, while attending to the refugees of war and the marginalized, let's listen to them.*

*Good reporting will challenge all forms of extremism. Take Daesh and its use of violence, cinematic technique and gaming imagery: we will dismantle that narrative and challenge their message. We will try to be where the real fight is: on the internet, on the social media, where the battle for correct information and against propaganda must be won.*

*Maybe there is a way to be quick and profound at the same time.*

*Narrating the other also requires taking the time to investigate. Asking a lot of questions, looking for a new angle and going the extra mile to tell the underreported stories. Trying not to forget that each character in our story has a first name. And a family.*

*Maybe this in itself would be a good starting point.*



# FREEDOM OF THE PRESS?

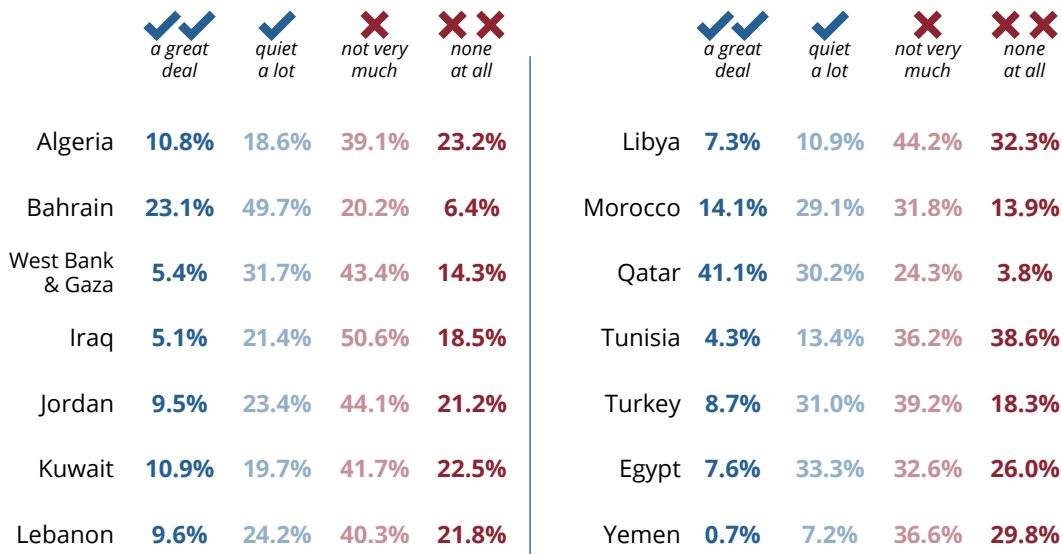
● Partly free    ● Not free



Year: 2016. Data: Freedom House

# TRUST IN MEDIA

Confidence in the press (2010-2014)



Year: 2016. Data: World Values Survey



# REFERENCES

<sup>1</sup> Available online:

[www.eib.org/attachments/efs/econ\\_mena\\_enterprise\\_survey\\_en.pdf](http://www.eib.org/attachments/efs/econ_mena_enterprise_survey_en.pdf)

<sup>2</sup> See, for example, EU Commission, *2016 Italy Country Report*.

[www.ec.europa.eu/europe2020/pdf/csr2016/cr2016\\_italy\\_en.pdf](http://www.ec.europa.eu/europe2020/pdf/csr2016/cr2016_italy_en.pdf)

<sup>3</sup> See for example: The World Bank (2008), *MENA Development Report, The Road Not Travelled: Education Reform in the Middle East and North Africa*, Washington D.C.; Mazawi, André & Ronald Sultana (eds.) (2010), *Education and the Arab 'World': Political Projects, Struggles, and Geometries of Power*, Routledge.

<sup>4</sup> For recent overviews see: United Nations (2015), *Report of the Special Rapporteur on the right to education Kishore Singh*, [www.ohchr.org/EN/HRBodies/HRC/.../JA\\_HRC\\_29\\_30\\_AEV.doc](http://www.ohchr.org/EN/HRBodies/HRC/.../JA_HRC_29_30_AEV.doc); UNESCO (2015), *The Privatization of Education in Developing Countries: Evidence and Policy Implications*, [www.unesdoc.unesco.org/images/0024/002438/243824e.pdf](http://www.unesdoc.unesco.org/images/0024/002438/243824e.pdf)

<sup>5</sup> On Egypt, see for example: Hartmann, Sarah (2008), *The informal market of education in Egypt - private tutoring and its implications*, [www.ifeas.uni-mainz.de/workingpapers/AP88.pdf](http://www.ifeas.uni-mainz.de/workingpapers/AP88.pdf); Sobhy, Hania (2014), *Tell the teacher: I see you, I thank you*, [www.madamasr.com/content/tell-teacher-i-see-you-i-thank-you](http://www.madamasr.com/content/tell-teacher-i-see-you-i-thank-you)

<sup>6</sup> See [www.youngarabvoices.org/](http://www.youngarabvoices.org/)

<sup>7</sup> See [www.missingmigrants.iom.int/mediterranean](http://www.missingmigrants.iom.int/mediterranean)

<sup>8</sup> [www.jeuneafrique.com/363645/culture/cinema-quest-succes-films-tunisiens-a-letranger/](http://www.jeuneafrique.com/363645/culture/cinema-quest-succes-films-tunisiens-a-letranger/)



# LIST OF INDEXES

## SHARED SECURITY

### **Index of Security Apparatus Instability:**

One of the twelve indicators on which is based the Fragile States Index (FSI), that is an annual ranking of 178 nations based on their levels of stability and the pressures they face. The security apparatus should have a monopoly on use of legitimate force. The social contract is weakened where affected by competing groups. The Index of Security Apparatus Instability includes pressures and measures related to: security apparatus; internal conflict; small arms; proliferation; riots and protests; fatalities from conflict; military coups; rebel activity; militancy; bombings; political prisoners. Range from 0 to 100 (with 0 indicating the least fragile and 100 the most fragile).

*Year: 2016. Data: Fund for Peace*

## SHARED PROSPERITY

### **Ease of Doing Business Score:**

Measure of business regulatory performance. A higher ease of doing business score means the regulatory environment is more conducive to the starting and operation of a firm. Range from 0 to 100 (with 0 the lowest performance and 100 the best performance).

*Year: 2016. Data: World Bank Group*

### **Human Development Index:**

Measure of average achievement in human development, combining life expectancy, education, and income per capita indicators. Range from 0 to 1 (with 0 the least developed and 1 the most developed).

*Year: 2015. Data: United Nations Development Programme*

### **Multidimensional Poverty Index:**

Measure of multidimensional poverty intended as income poverty combined with severe deprivations that each person faces at the same time with respect to education, health and living standards. Range from 0 to 1 (with 0 the least poor and 1 the poorest).

*Year: 2016. Data: Oxford Poverty and Human Development Initiative*

### **Water Stress:**

Measure of water demand intended as the ratio of total annual water withdrawal (i.e. water consumption) to average annual available blue water (i.e. water supply). A higher percentage means more water users are competing for limited water supplies.

*Year: 2013. Data: World Resources Institute*

## CIVIL SOCIETY AND CULTURE

### **Freedom of the Press Score:**

Measure of the degree of print, broadcast, and digital media freedom combining legal, political and economic environment indicators. Score ranges from 0 (most free) to 100 (least free). Total score determines status designation of Free (0-30), Partly Free (31-60), or Not Free (61-100).

*Year: 2016. Data: Freedom House.*

### **Gender Parity Index:**

Measure of the parity between girls and boys. A GPI of less than 1 suggests girls are more disadvantaged than boys in learning opportunities and a GPI of greater than 1 suggests the other way around. GPI for gross enrollment ratio in primary education is the ratio of girls to boys enrolled at primary level in public and private schools. Ratio of girls to boys gross enrollment ratio in primary education is calculated by dividing female gross enrollment ratio in primary education by male gross enrollment ratio in primary education.

*Year: 2014. Data: World Bank.*

### **Government Restrictions on Religion Index:**

Measure of the extent to which governments restrict religious beliefs and practices, based on 20 indicators of ways that national and local governments restrict religion, including through coercion and force. Range from 0 to 10 (with 0 indicating very low government restrictions and 10 indicating extremely high restrictions).

*Year: 2016. Data: Pew Research Center*

### **Social Hostilities Involving Religion Index:**

Measure of the extent to which social groups, organizations and individuals restrict religious beliefs and practices, based on 13 indicators of ways in which private individuals and social groups infringe on religious beliefs and practices, including religiously biased crimes, mob violence and efforts to stop particular religious groups from growing or operating. Range from 0 to 10 (with 0 indicating very low social impediments to religious beliefs and practices and 10 indicating extremely high impediments).

*Year: 2016. Data: Pew Research Center*





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