SECTORAL COOPERATION

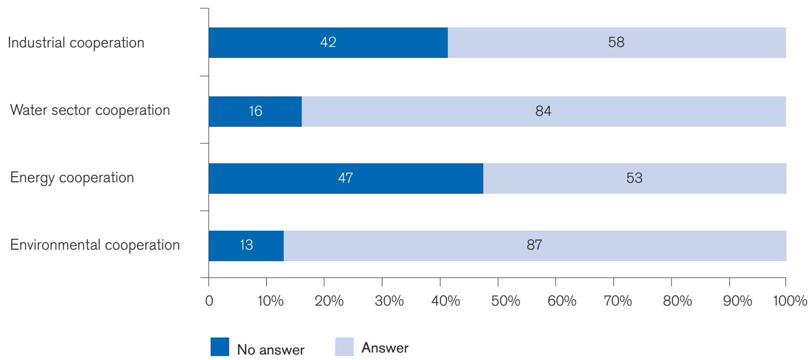
Sectoral Cooperation in the Framework of the EMP

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

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

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

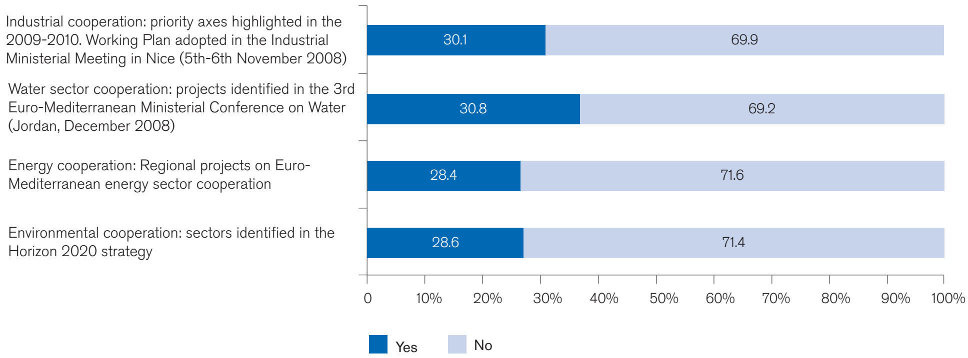
Graph 1: % of answer to general questions on sectoral cooperation in the Mediterranean



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

It is important to point out that, in relation to questions aimed at experts who have knowledge of each of the issues approached, the percentage of respondents who say they have enough knowledge to assess cooperation in a specific sector in detail is around 30% of total respondents.

Graph 2: Filter questions: Knowledge or clear perception of sectoral cooperation in the Mediterranean %



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

I. Industrial Cooperation: Industrial Modernisation Programmes

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

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

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

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

Jordan respondent

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

Algerian respondent

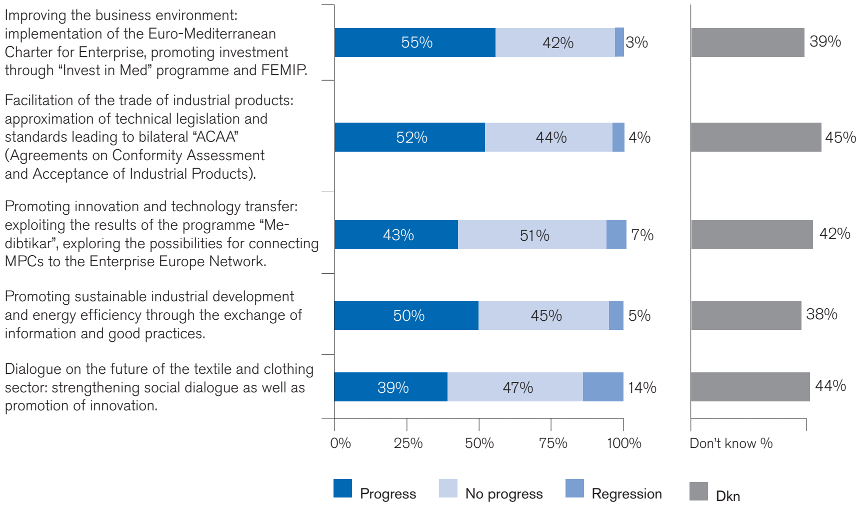
Multiples initiatives et rencontres/d'avenir industriel des PPM se dessinent mais peu de transfert de connaissance et beaucoup de clé sur porte.

Belgian respondent

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

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

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



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

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

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

The assessment of the different programmes by geographical origin of respondents[1] follows, without significant differences, the general patterns of all respondents. However, there is a more negative assessment by the Maghreb and the Mashreq group (who, in their turn, have a better knowledge of the progress in each of the five axes). This slightly more negative assessment worsens in relation to the progress in "*dialogue on the future of the textile and clothing sector*": 20% of respondents from the Maghreb and 16% from the Mashreq consider that not only has there been no progress but there has also been regression.

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

1. Note that, although respondents are experts with a good knowledge of the issue, they only represent around 30% of total participants. Any break-up of the data – whether by regional, national, institutional or professional origin – must be considered with caution given the decrease in the representativeness derived from the reduction of the sample base.

from the European Union (37% of MPC respondents vs. 22% of European respondents). In the case of respondents from the Maghreb and the "economic and financial cooperation" professionals, the percentages are 48% of positive answers in the first case and 46% in the second. Once again, non-Mediterranean EU countries have the least knowledge (15%).

In the assessment of the Invest in Med[2] network, the grade is slightly more positive (5.4 on average) given that 50% of grades are above 6. From the analysis by geographical origin of respondents,[3] it is notable that, at a regional level, MPC respondents together with the non-EU Europeans give grades below the average. The difference between respondents from the Maghreb and Mashreq is also revealing insofar as they are the countries in both regions that directly benefit from the programme. In this respect, Maghreb respondents make the least positive average assessment (4.7) and those from the Mashreq, the most positive (5.8). Thus, while in Morocco, Tunisia and Algeria the average assessments oscillate around 4.6, all the countries of the Mashreq give grades above 5.5 and in three countries – Syria, Palestine and Lebanon – the grades are even above 6.

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

Egyptian respondent

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

Tunisian respondent

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

Spanish respondent

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

Belgium respondent

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

Out of the four national plans implemented between 1995 and 2006,[4] Tunisia's is considered the most efficient and has made the most impact (5.9 on average, in which 0 stands for poor efficiency and 10 for a very high level of efficiency) followed by Jordan (5.7), Egypt (5.2) and Lebanon (5.1). The analysis by geographical origin of respondents reveals that average assessments of those from the Mashreq are more positive than those from the Maghreb. Lastly, it is notable that, although it was a specific question aimed only at those with knowledge of the issue, around 25% of these experts were not able to assess the impact of the different national plans.

2. A Euro-Mediterranean network of organisations committed to investment promotion and trade facilitation, strengthening SME collaboration and exchange of best practices. Countries: Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria and Tunisia. Timeframe**:** 2008-2011. Budget**:** €9 million.
3. See note 1 (pag. 75)
4. Industrial modernisation (*mise-à-niveau*) programmes implemented in the framework of the MEDA Programmes (1995-2006) on the competitiveness of local industries and in particular SMEs. Budget: Egypt (€250 million), Tunisia (€50 million), Jordan (EJADA, €40 million) and Lebanon (€40 million).

More technical assistance is needed for capacity-building of SMEs to upgrade capabilities and facilitate access to finance.

Egyptian respondent

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

Moroccan respondent

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

Jordan respondent

II. Water Sector Cooperation: the Mediterranean Water Strategy

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

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

The differences between respondents from the Maghreb and the Mashreq are probably highly conditioned by the geopolitical and climate particularities of the member countries. While in Mashreq countries, water dependency is a geopolitical problem of primordial importance (danger of interstate conflicts resulting from interstate distribution of common hydrographical basins),[5] in Maghreb countries the problem has an environmental and climate nature (risk of droughts and seasonal hydric stress).

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

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

5. For example, the percentage of water dependency of Syria amounts to 72.4% of total water resources, in Egypt 96.6% and in Jordan 27.2% (Source: FAO Data, 2008).

Maghreb, for each and every one of the priority lines of action, invariably make assessments clearly below the average of all respondents while those from the Mashreq make assessments slightly above the general average in relation to the need for "*adaptation to the climate change*" and "*balance between (water) supply and demand*".

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

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

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

Les questions de l'eau ne sont pas des questions techniques mais financières. Il faut faciliter l'action du secteur privé et réduire le risque de l'investissement. C'est une question de gouvernance et de confiance donnée à l'investisseur.

French respondent

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

Egyptian respondent

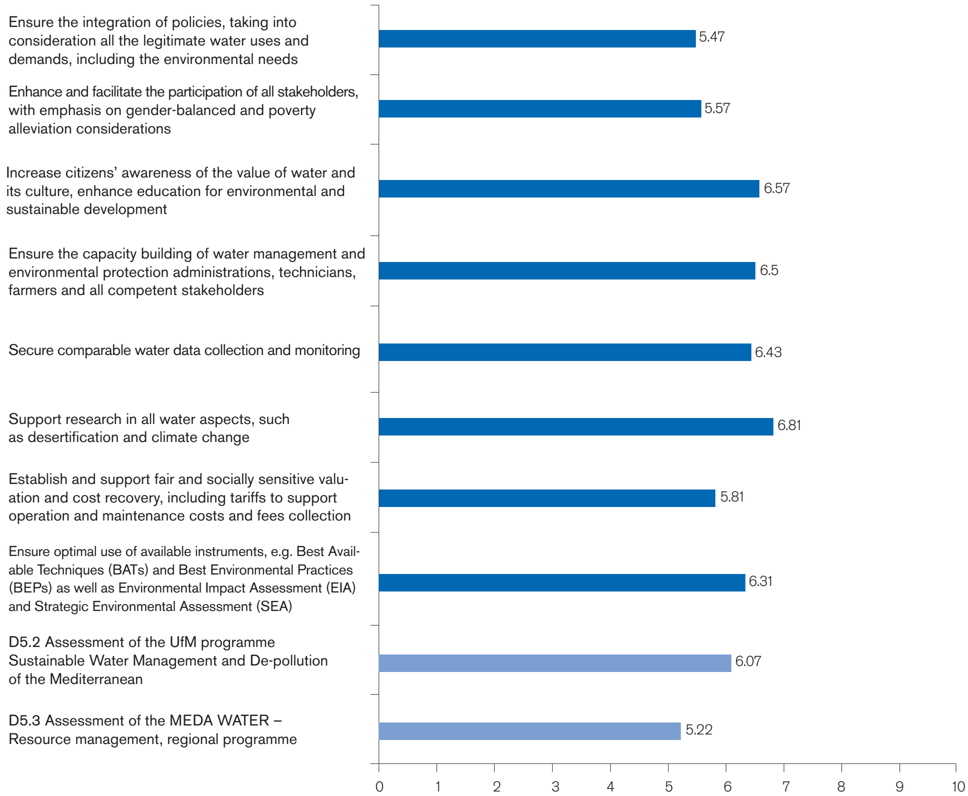
Ce secteur est aujourd'hui principalment dominé par une approche de privatisation. Or, l'approche la plus juste et la plus durable pour ce bien commun (l'eau) est celle qui se fonde sur un partenariat privé/public.

Moroccan respondent

The analysis by origin of respondents reveals that there is a shared perception of the issues that are less prone to political blockage. However, respondents from Maghreb and the Mashreq countries invariably consider the prospects for short-term progress more positively than EU respondents.

Graph 4: Assessment of the prospects for progress over the short term of the objectives of the Strategy for Water in the Mediterranean

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



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

In relation to the assessment of the MEDA WATER project developed between 2003 and 2008, the specialists who answer this question make an average assessment of 6. Once again, analysis by geographical origin of respondents highlights a lower average assessment from the Maghreb (5.64) than the Mashreq (6.88). Moreover, EU countries give homogenous average grades of around six. Bearing in mind that a third of all respondents answered this specific question, the high irregularity between average grades of respondents from countries benefiting from the project stands out. Thus, tentatively, it can be noted that Syrian and Lebanese respondents assess the programme positively (above the average), while, in the extreme opposite, Tunisian respondents grade it below 5.

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

III. Energy Cooperation: 2008-2013 Priority Action Plan

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

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

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

Il y a des difficultés d'harmonisation des marchés et de la législation en matière d'énergie en raison des différences entre les pays Euromed. Il faut, donc, procéder à leur adaptation en fonction des réalités de chaque pays partenaire.

Moroccan respondent

L'énergie est l'un des domaines où le marché peut engendrer une véritable coopération nord-sud.

French responent

Ce domaine est au cœur du partenariat entre les deux rives.

Tunisian respondent

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

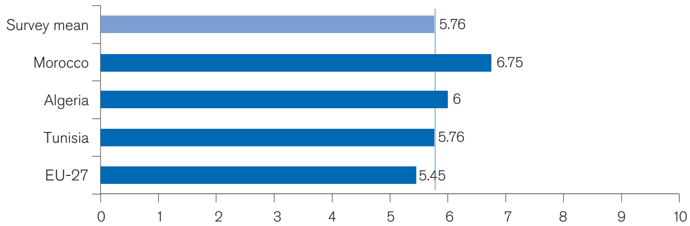
Thus, respondents who say they have a clear perspective on energy cooperation consider that the performance of the regional programmes – Electricity market integration, EAMGM II Euro-Mashreq Gas Market Project, MED-EMIP Energy cooperation, and MED-ENEC II - Energy efficiency in construction – is quite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

6. Paving the Way for the Mediterranean Solar Plan. Programme approved by the European Commission in November 2009 (5 million euros) to support the improvement of the framework conditions for the development of renewable energies.

Specifically, the regional programme Electricity market integration[7] receives an overall average grade of 5.8. According to geographical origin,[8] MPC respondents assess its performance slightly more positively (6.1) than those from the EU (5.4). It is significant that the region benefiting from this programme – the Maghreb – grades it slightly less positively than the Mashreq (6 vs. 6.3). Among the countries involved in this project, those by Moroccan respondents stand out, much higher than the overall average (6.75), while respondents from EU countries – and, particularly, non-Mediterranean EU countries – are lower.

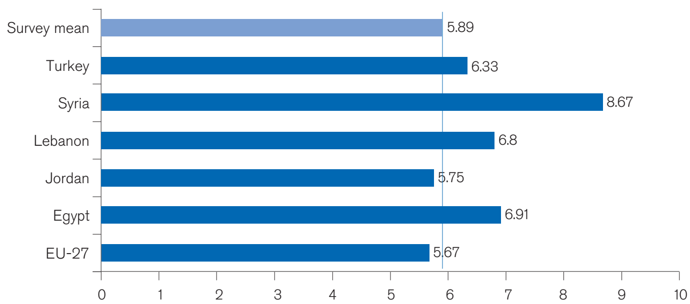
The EAMGM II[9] project has an average grade of 5.9. This average is exceeded by respondents from the Mashreq (6.9) and Turkey (6.3) – the main beneficiaries of the project – and by respondents from European countries which are not members of the EU (6.25). In this respect, it is important to note that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

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



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

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



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

7. Electricity market integration. Supports the development of an integrated electricity market between Algeria, Morocco and Tunisia and between these three Maghreb countries and the EU, through the harmonisation of their legislative and regulatory framework. Timeframe: 2007-2010. Budget: €4.9 million (MEDA).
8. See note 1 . (pag. 75)
9. EAMGM II – Euro-Arab Mashreq Gas Market Project. Supports the development of an integrated gas market in order to create a regional gas market and as a step towards integrating with the EU gas market. Egypt, Iraq, Jordan, Lebanon, Syria and Turkey. Timeframe: 2010-2013. Budget: €5 million EU contribution.

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

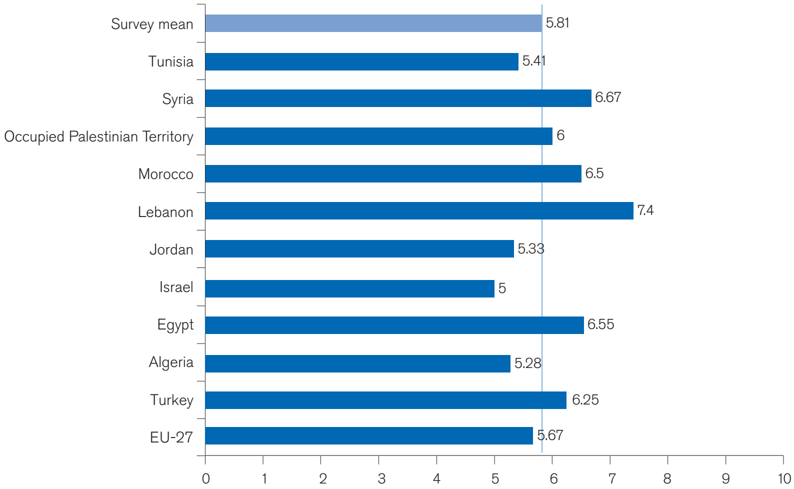
The same pattern is observed for the assessment of the energy efficiency project in the construction sector MED-ENEC II.[11] This project stands out for the distance between the overall average grade of the sample (5.7) and the average corresponding to Mashreq respondents (7.0), which is the highest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

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

10. MED-EMIP – Energy cooperation. A platform for energy policy dialogue and exchange of experiences, leading to enhanced Euromed cooperation, integration of the energy markets and improved security and sustainability. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia and Turkey. Timeframe: 2007-2010 Budget: €4.1 million (MEDA).

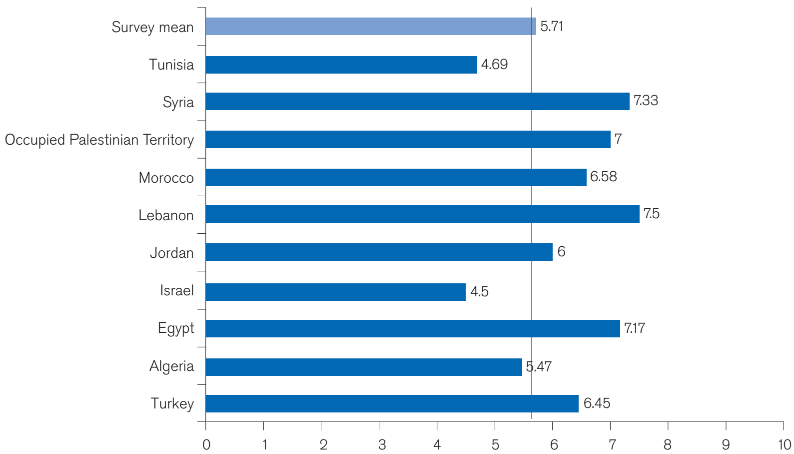
11 . MED-ENEC II – Energy efficiency in construction. Encourages energy efficiency and the use of solar energy in the construction sector, through capacity building, fiscal and economic instruments and pilot projects. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia and Turkey. Timeframe: 2009-2013. Budget: €5 million.

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



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

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



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

IV. Environmental Cooperation

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

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

Maltese respondent

L'UpM connaît mieux les problèmes de ses pays membres mieux que n'importe quelle autre institution.

Mauritanian respondent

La spécificité et l'urgence des problèmes de l'environnement dans le pourtour méditerranéen sont mieux perçues et ressenties au niveau regional.

Moroccan respondent

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

French respondent

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

Lebanese respondent

Un cadre régional de coopération a plus de chance de réussir qu'un cadre global dilué.

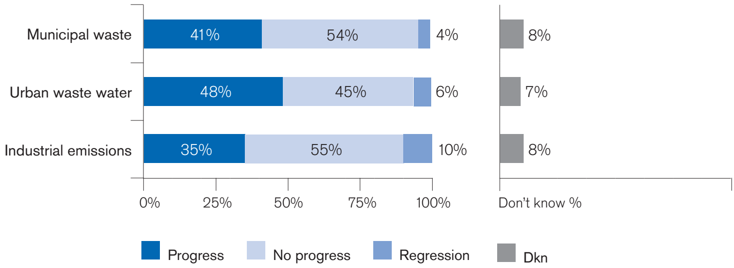
Algerian respondent

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

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

In relation to Horizon 2020, regardless of the source of pollution, most assessments are of "no progress" and "regression". Considering the three priority action sectors together, only 40% of respondents consider that there has been progress. However, there are variations according to the sector assessed. 48% and 41% of respondents consider that there has been progress in the sectors of waste water and urban waste, respectively. In the sector of industrial emissions, this rate decreases to 35%.

Graph 8: Assessment of the progress in the sectors identified in the Horizon 2020 strategy
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)



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

The comparison according to geographical origin of respondents reveals differences between the perceptions of those from the MPCs and EU-27 of up to 10 points.

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

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

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

The regional programmes SMAP III — Sustainable environmental development[12] and Maritime SAFEMED II — Maritime safety and pollution prevention[13] receive very close average grades (5.7 and 5.5, respectively).

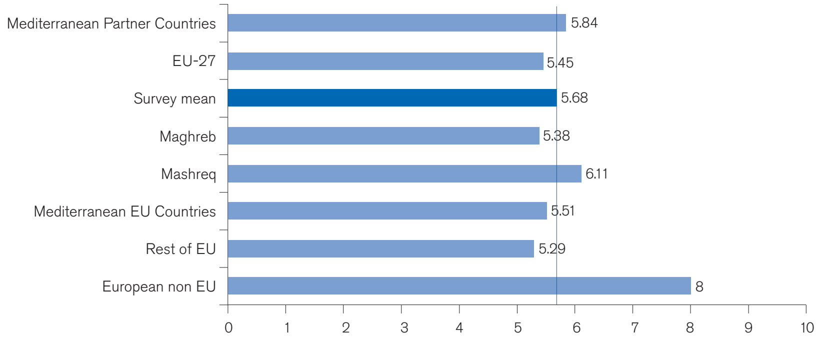
From the analysis by geographical origin of respondents,[14] it is notable that, in the case of SMAP III the grades of respondents from Mediterranean EU countries (5.5) and from the Maghreb (5.4) are below the average. Again, the initiative is most positively assessed in the Mashreq (6.1). There is a high variation in the assessment of the programmes by respondents from the countries involved: e.g., Turkish, Palestinian and Egyptian respondents grade it above 6, while those from Jordan give it the lowest grade: 4.5.

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

12. SMAP III – Sustainable environmental development. Promotes sustainable development and supports high priority environmental related activities, through technical and financial assistance. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia and Turkey. Timeframe: 2005-2008. Budget: €15 million (MEDA).
13. SAFEMED II – Maritime safety and pollution prevention. Promotes cooperation in maritime safety and security and prevention of pollution from ships by providing technical advice and support. Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Occupied Palestinian Territory, Syria, Tunisia and Turkey. Timeframe: 2009-2011. Budget: €5.5 million (ENPI South).
14. See note 1 (p. 3).

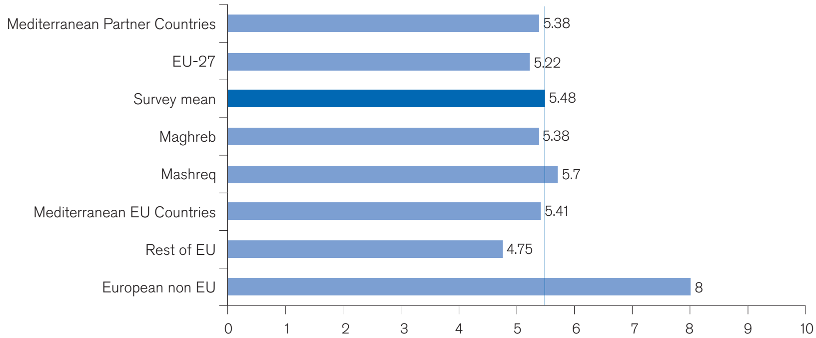
Graph 9: Assessment of the environmental cooperation regional programmes
(average on a scale of 0-10, where 0 stands for very disappointing, and 10 for very positive)

a) SMAP III – Sustainable environmental development



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

b) SAFEMED II – Maritime safety and pollution prevention



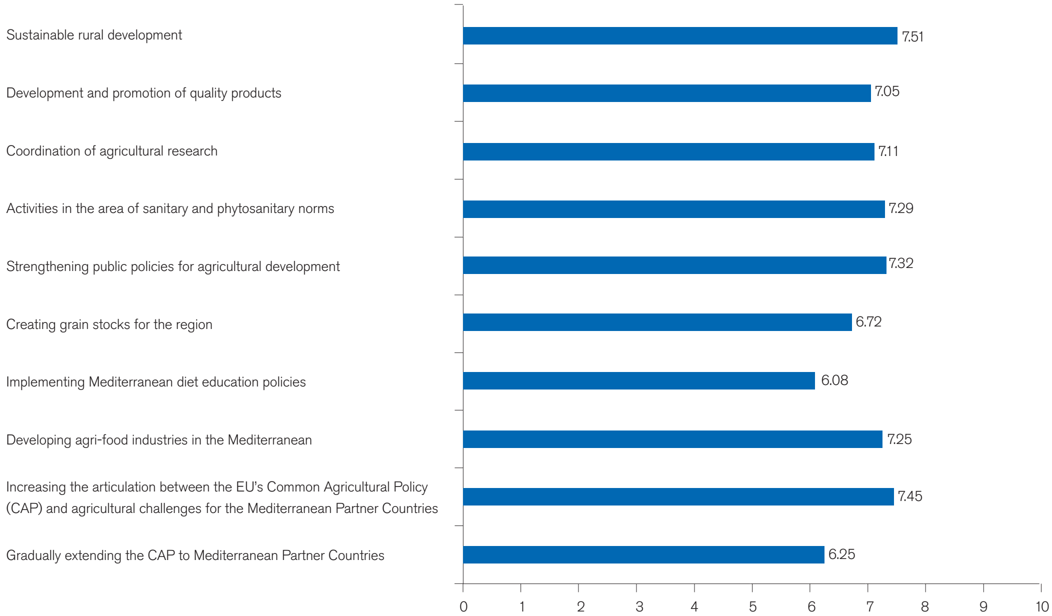
Source: Compiled by the IEMed based on the results of the 2nd Euromed Survey

V. Food Security

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

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

Graph 10: Assessment ofthe relevance of selected issues for the next Ministerial Meeting in the field of food security, agriculture and rural development
(average on a scale of 0-10, where 0 stands for very low, and 10 for very high)



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

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

Spanish respondent

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

Moroccan respondent

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

French respondent

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

15. The Conference has been postponed on two occasions and, at time of publication, the date has not been formally announced.