



Shaping Policy: Regional Consultation on the New Pact for the Mediterranean

SUPPORT TO REFLECTION AND CONSULTATIONS ON THE PACT FOR THE MEDITERRANEAN

IN THE CONTEXT OF THE DEVELOPMENT OF THE EU'S NEW PACT FOR THE MEDITERRANEAN, THE EUROPEAN INSTITUTE OF THE MEDITERRANEAN (IEMED) HAS BEEN ENTRUSTED BY THE EUROPEAN COMMISSION TO PROVIDE AN EXCLUSIVE SPACE WHERE EXPERTS, THOUGHT LEADERS AND POLICYMAKERS COLLABORATE, REFLECT, AND OFFER STRATEGIC RECOMMENDATIONS. IN THAT FRAMEWORK, AND IN ITS CAPACITY AS COORDINATING SECRETARIAT, THE IEMED MOBILISED THE EUROMESCO NETWORK AND ITS ESTABLISHED INSTRUMENTS OF ACTION TO LEVERAGE THE DEPTH OF REGIONAL EXPERTISE AND ENSURE THAT THE VOICES OF KEY STAKEHOLDERS INFORM AND SHAPE THE FUTURE OF EURO-MEDITERRANEAN COOPERATION.

EUROMED SURVEY 15 FORMS AN INTEGRAL PART OF THESE BROADER CONSULTATIONS, ENGAGING A WIDE RANGE OF STAKEHOLDERS IN THE LEAD-UP TO THE RELEASE OF THE NEW PACT. BUILDING ON YEARS OF EXPERIENCE, THE SURVEY CONTINUES TO DELIVER OPEN, REGION-WIDE INSIGHTS AND SOLID QUANTITATIVE DATA TO INFORM AND SUPPORT EVIDENCE-BASED POLICYMAKING AT THE EU LEVEL.

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Detailed results of the survey only available online at www.iemed.org

INTRODUCTION

Senén Florensa
Executive President, IEMed

Following European Commission President Ursula von der Leyen's call for a more focused approach to the EU's wider neighbourhood –particularly the Mediterranean– the European Commission has established a new Directorate-General for the Middle East, North Africa and the Gulf (DG MENA), under the leadership of Commissioner Dubravka Šuica. This new body is tasked with steering and shaping the future goals of EU-Mediterranean policy. To that end, the EU and its Southern Neighbourhood partner countries are discussing a **New Pact for the Mediterranean**, aimed at creating a comprehensive framework to address the region's complex challenges through jointly agreed priority areas.

Within this context, the European Institute of the Mediterranean (IEMed), acting as Secretariat of the EuroMeSCo network, was entrusted by the European Commission to **support** broad and inclusive **reflections and consultations on the Pact for the Mediterranean**. This initiative responds to the EU's strategic objective of formulating a New Pact grounded in mutual understanding and informed by structured dialogue with Southern partners. The present **Euromed Survey contributes to the broader consultation campaign, bringing open, region-wide perspectives to the table**.

This report analyses the main results from the survey, conducted in March 2025. It **provides valuable insights on the understanding of a variety of experts and actors on the EU's overall engagement with the Southern Neighbourhood and its cooperation frameworks**.

The survey collected inputs from the European Union (EU) and Southern Neighbourhood Countries (SNC), engaging policymakers, experts, and civil society representatives. The questionnaire focused on two main sections. The first explored key aspects of the **EU's engagement with the Southern Neighbourhood**: the EU's role and impact in the region; the influence of other major regional actors; the potential of EU–SNC partnerships; and the implications of the EU's response to the Israeli-Palestinian conflict. The second section examined **how to shape effective cooperation**, including the structuring of cooperation mechanisms, the definition of clear priorities, the role of the Union for the Mediterranean (UfM) and the mobilisation of the Global Gateway and strategic infrastructure investments to foster deeper regional integration.

These are the survey's main take-aways:

- Since the launch of the new Agenda for the Mediterranean in 2021, **the EU's role in the Southern Neighbourhood is generally perceived as stable**. Views from the European Union tend to be more critical, while **perspectives from SNCs are more positive**.
- The EU has **strengthened its role in environmental and climate-related areas**, though **conflict resolution remains the most urgent challenge**. Concerns persist over **declining influence in economic cooperation and democratic governance**.
- The EU sees the Gulf countries and Türkiye as key regional players, while **the Southern Neighbourhood views the EU as the main actor across the**

region. Compared to other players, EU's **added value** stems from its **values-based, long-term, and comprehensive approach**.

- Nevertheless, the **EU's response to the Israeli-Palestinian conflict has undermined its core values and credibility in the region**. To play an effective role in a post-conflict scenario, respondents underlined that the priority should be given to the **recognition of the Palestinian State** and the **reconstruction of human capacity in Gaza**.
- They also stress that the enhancement of the EU's engagement with the Southern Neighbourhood requires prioritising a **strong partnership model**. Relations between the EU and SNCs should be built on **greater equality and mutual balance**, while also contributing to the **resolution of long-standing conflicts**.
- Within the toolbox of the New Pact, **investment instruments should be considered a top priority**. Particular emphasis should be placed on **fostering talent and skills**, as well as **intensifying cooperation on climate adaptation**. There is broad agreement that the main areas for action are economic development, trade, and investment, followed by environment and climate change adaptation.
- The **Union for the Mediterranean is recognised as a key platform** for advancing shared interests on equal terms and should further develop regional cooperation mechanisms. Its **reform should prioritise enhanced dialogue with neighbouring regions** through collaboration with other actors.
- The Global Gateway strategy offers strong potential, notably in employment generation and infrastructure development. **Digital connectivity and sustainable transport corridors are particularly relevant for promoting regional integration**.

To shed light and help explain these issues, the report is accompanied by a series of qualitative analyses:

Charlotta Sparre explores how the New Pact for the Mediterranean can renew joint investment in dialogue in the current context, drawing on past successes and failures. **Salam Kawakibi** looks closer on how to revamp EU-Mediterranean cooperation for more balanced and sustainable partnerships. **Christian Hanelt** and **Nico Zillekens** focused on how the European Union, the Southern Neighbourhood and the Gulf Cooperation Council can shape the future together in an increasingly multipolar Mediterranean landscape. Finally, **Yasmina Abouzzohour** examines how to bridge public opinion and stakeholder perspectives on climate change in the Middle East and North Africa.

Wrapping up, strengthening the EU's role in the Southern Neighbourhood will require sustained political commitment, improved coherence in its external action, and a renewed focus on mutual trust. A key challenge ahead lies in effectively translating strategic priorities into tangible outcomes on the ground. **Ensuring that partnerships are rooted in shared ownership and respond to locally identified needs will be essential for building credible and lasting cooperation.**

To support this effort, the IEMed is complementing the regional Survey with a series of consultation circles held not only in Brussels but also across key Southern Neighbourhood countries, including Rabat and Cairo. These events brought together, between April and June 2025, local experts, civil society representatives, and policymakers to deepen dialogue and ensure that regional perspectives directly inform the policy process.

Learn more about the project: euromesco.net

DESCRIPTIVE REPORT



EU's overall engagement with the Southern Neighbourhood

The Euromed Survey was launched in 2025 to support the development of a new, forward-looking EU strategy for the Mediterranean region. Its main goal was to gather insights and proposals from a broad range of stakeholders to help define shared priorities and address the complex challenges facing the region. By capturing diverse perspectives from both shores of the Mediterranean, the survey aimed to ensure that the future New Pact for the Mediterranean is grounded in real needs and regional aspirations.

The first section of the Survey focused on the broader dynamics of the EU's engagement with the Southern Neighbourhood. It looked at the EU's role and influence in the region, the presence of other key international actors, the potential for stronger partnerships, and the impact of the EU's stances on key regional conflicts.

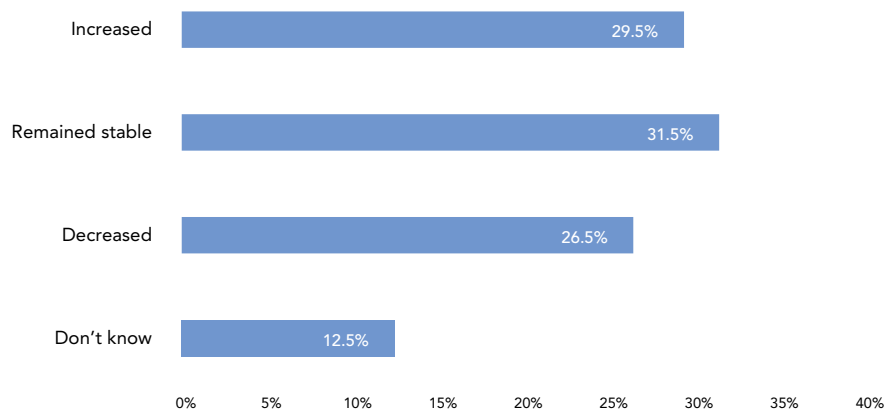
Main Findings:

- There is a consensus amongst respondents that since the launch of the new Agenda for the Mediterranean in 2021, the role of the EU in the Southern Neighbourhood has remained stable.
- For this period of time (2021-2025), EU respondents were more critical on the role of the Union, while Southern Neighbourhood countries (SNC) respondents showed a more positive view.
- Action on environment protection, fighting climate change, green transition, agriculture and water management are the specific areas where the EU has increased its role.

- Overall results suggest that, while conflict resolution remains the most urgent area for an enhanced EU action, there is also concern about a declining EU impact and role across economic and trade cooperation, as well as in democracy and good governance promotion.
- EU respondents place the Gulf countries and Türkiye as the most relevant actors in the region, while SNC respondents put the EU clearly as the main actor, followed by the United States and the Gulf countries.
- Compared to other actors in the region, respondents considered that the added value of EU cooperation is broadly based on its values-based perspective together with its long term, reliable and comprehensive approach.
- According to respondents, a combination of “Geopolitical alliances and stability” and “Achieving Sustainable Development Goals (SDGs)” would be best potentials that can be achieved through the partnership between the EU and its Southern Neighbourhood.
- The EU’s response to the Israeli-Palestinian conflict is widely viewed as undermining its core values and credibility in the region.
- Priorities to be effectively helpful in the Day-After scenario should focus on the recognition of the Palestinian State, together with the need to rebuild human capacity in Gaza.
- Priorities for Syria should be a combination of political tools, economic aid, reopening cooperation and protection measures for the safe return of refugees.

The **first question** of the survey invited respondents to evaluate the impact of the EU in the region during the last four years, that is, since the launch of the new Agenda for the Mediterranean in 2021. **Overall results displayed a third of respondents considering that the role of the EU in the Southern Neighbourhood has remained stable**, narrowly followed (2 percentual points) by those considering that the EU role has increased (see graph 1), while a decreased role of the EU was perceived by a quarter of respondents.

Graph 1: Q.1 In your opinion, since the launch of the new Agenda for the Mediterranean in 2021, the role/impact of the EU in its Southern Neighbourhood has:

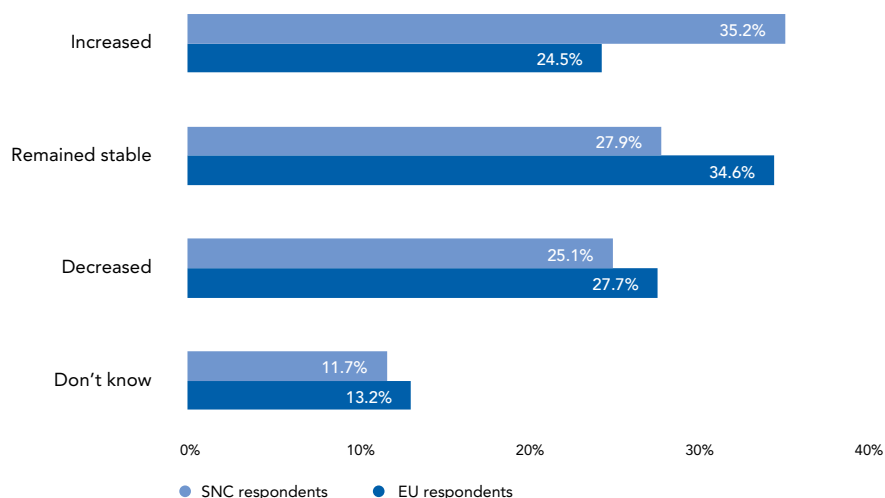


Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

Disaggregating results between respondents from the EU and those from the Southern Neighbourhood countries, some nuanced trends emerged.

EU respondents were more critical on the role of the EU in the region, while SNC respondents showed a more positive view. Zooming in on these results (see graph 2), first option for SNC was that the EU has increased its role in the region (35%), “remained stable” being the second option (28%). In contrast, EU respondents considered in first place that EU role has remained stable (35%) followed by those that considered a decrease in its role or impact (28%).

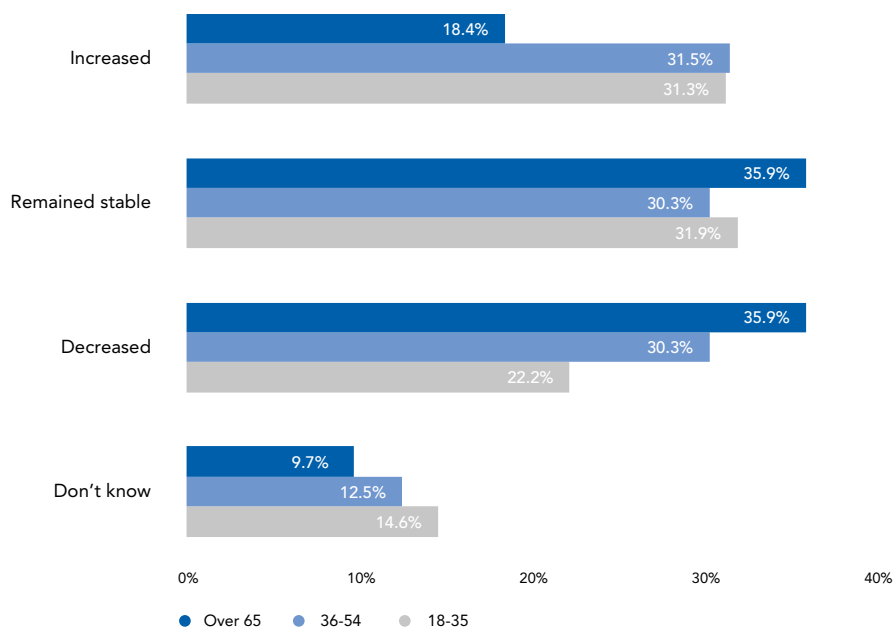
Graph 2: Q.1 In your opinion, since the launch of the new Agenda for the Mediterranean in 2021, the role/impact of the EU in its Southern Neighbourhood has:



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

When the data is disaggregated by age groups, results show that **the younger the respondents, the less negative perceptions they have.**

Graph 3: Q.1 In your opinion, since the launch of the new Agenda for the Mediterranean in 2021, the role/impact of the EU in its Southern Neighbourhood has:



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

In their comments, respondents highlighted some elements explaining the increased role/impact of the EU in the region:

This initiative led to the allocation of new budgets and support programs for development projects, which contributed to infrastructure improvements and promoted innovation in strategic areas such as renewable energy and digital transformation, thereby positively impacting stability and development in the region.

— Jordanian respondent

The EU's role has increased in terms of funding, visibility, and political engagement on migration in the Southern Neighbourhood since 2021. But its impact is nuanced: while the EU has expanded its toolbox and reach, the effectiveness and sustainability of its approach remain under scrutiny, especially regarding respect for human rights and shared ownership with partner countries.

— Greek respondent

While the EU's ambitions are commendable, the practical results often depend on local governance, regional politics, and effective coordination among various EU institutions. Nonetheless, from an overall perspective, the New Agenda for the Mediterranean has definitely given the EU a higher profile and expanded influence in its Southern Neighbourhood.

— Egyptian respondent

The agenda led to increased financial commitments, policy engagement, and sectoral cooperation. Nevertheless, geopolitical tensions, migration pressures, and regional instability continue to pose challenges.

— Moroccan respondent

Comments of those respondents that considered the EU role remained unchanged, pointed to a **balance between positive engagement and effectiveness that should be improved**:

The EU has strengthened its economic and security role in the Southern Neighbourhood post-2021, however, its impact is constrained by competing priorities, geopolitical rivalries, and EU's internal contradictions.

— Cypriot respondent

The programmes designed by the EU for the southern shore of the Mediterranean were developed without sufficient consultation with the direct beneficiaries, notably Mediterranean civil society associations. This lack of dialogue and involvement reduces their effectiveness on the ground and hampers any dynamic for sustainable change. Although some initiatives have had positive effects, their impact remains limited due to a top-down approach that is insufficiently rooted in local realities.

— Algerian respondents

While no groundbreaking new initiatives have significantly altered its engagement, the EU has also avoided major failures, ensuring steady involvement rather than drastic shifts. Even as the region faces new instabilities, including economic crises and political unrest, the EU continues to play its traditional role as a diplomatic and financial supporter, rather than a direct actor in conflict resolution.

— Slovenian respondent

Comments referred to the EU's decreased role or impact highlighted factors such as incoherent policies, transactional approaches or lack of genuine engagement:

The EU has been less effective due to divisions or different messaging (partly within EU institutions but also between EU member states). But also, the EU is clearly less invested in the southern mediterranean (partly due to an understandable focus on Ukraine) and its focus tends to be very transactional (which reinforces a certain distance)

— Lebanese respondent

With increasing influence from other global powers (e.g., China, Russia, Gulf countries), some Mediterranean countries are looking beyond the EU for investment and strategic partnerships, reducing the EU's dominance in the region. Furthermore, the EU's inconsistent stance on key regional conflicts and governance issues has weakened trust in its role as a reliable partner. The bloc often struggles to present a coherent and unified foreign policy due to internal disagreements among member states.

— Irish respondent

Despite some initiatives and programs, the impact of EU remains low and decreasing due to stagnant trade relations and limited integration. The absence of an EU-South Med vision with a clear roadmap that engages the South Med governments in the process are some of the reasons behind this.

— Egyptian respondent

The positions taken by the European Union since October 7 have greatly undermined the confidence of Euro-Mediterranean CSOs in the EU (question of Europe's double standards in defending international law when it comes to the Israeli occupation policy). In addition, border externalization policies contradict the values of human rights and asylum protection that are supposed to lie at the heart of the European project.

— French respondent

European foreign policy towards the region is undeniably characterized by transactionalism and bilateralism, often to the detriment of human rights, the rule of law and good governance. Today, CSOs and human rights defenders (HRDs) in the Southern Neighbourhood find themselves increasingly isolated, under-resourced, and subject to growing attacks and restrictions not only from their own governments, but also indirectly through EU policy.

— Moroccan respondent

The 2021 Agenda tried to be very inclusive, but in the end, it became a bit of a “Christmas tree” –overloaded with priorities and not impactful enough. One key issue was the lack of real engagement from southern neighbours in both the design and implementation of the agenda, which made it harder to align with regional and local needs and realities

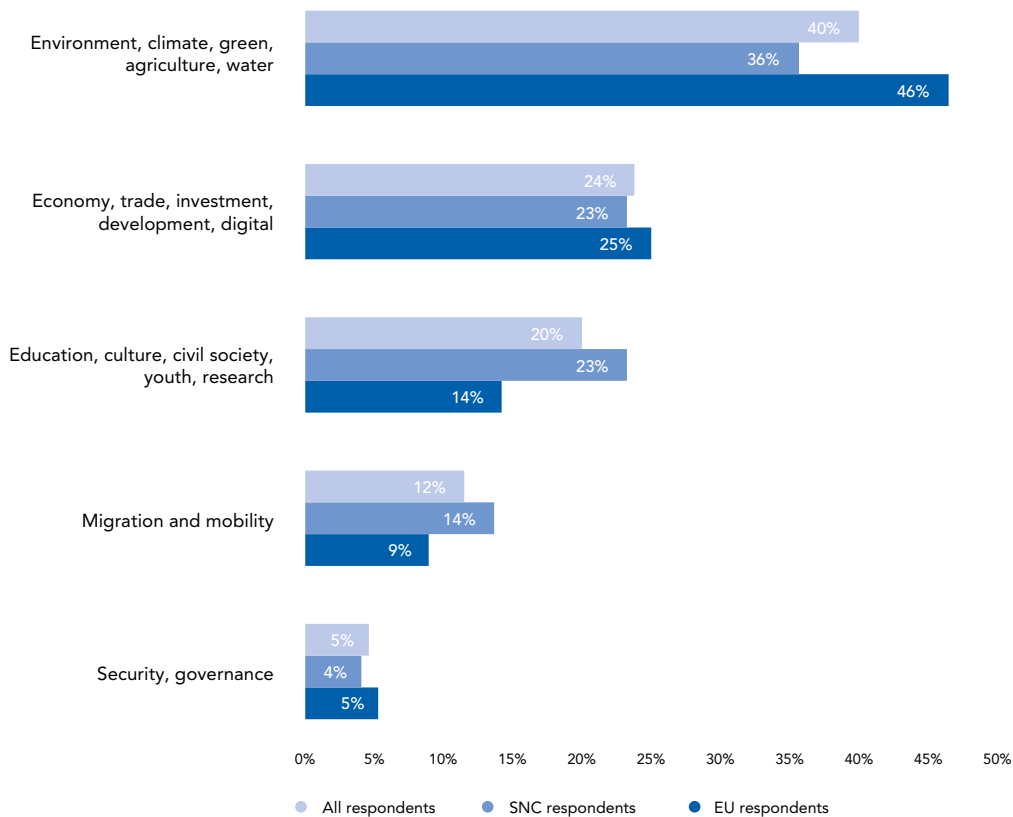
— Spanish respondent

Question 2 was an open-ended one, designed for those that answered that the role of the EU had increased in the last four years (question 1) and proposed to identify positive examples related to this.

Examples gathering EU action on **environment cooperation** (including fighting climate change, green transition, agriculture and water management) came out as first category of answers, followed by those initiatives related to **trade and economy, investment and the digital transition** (graph 4).

EU respondents showed a clear trend identifying examples related to environment cooperation, while SNC respondents showed a more balanced distribution across the leading categories, on environment and climate action, economy, and education.

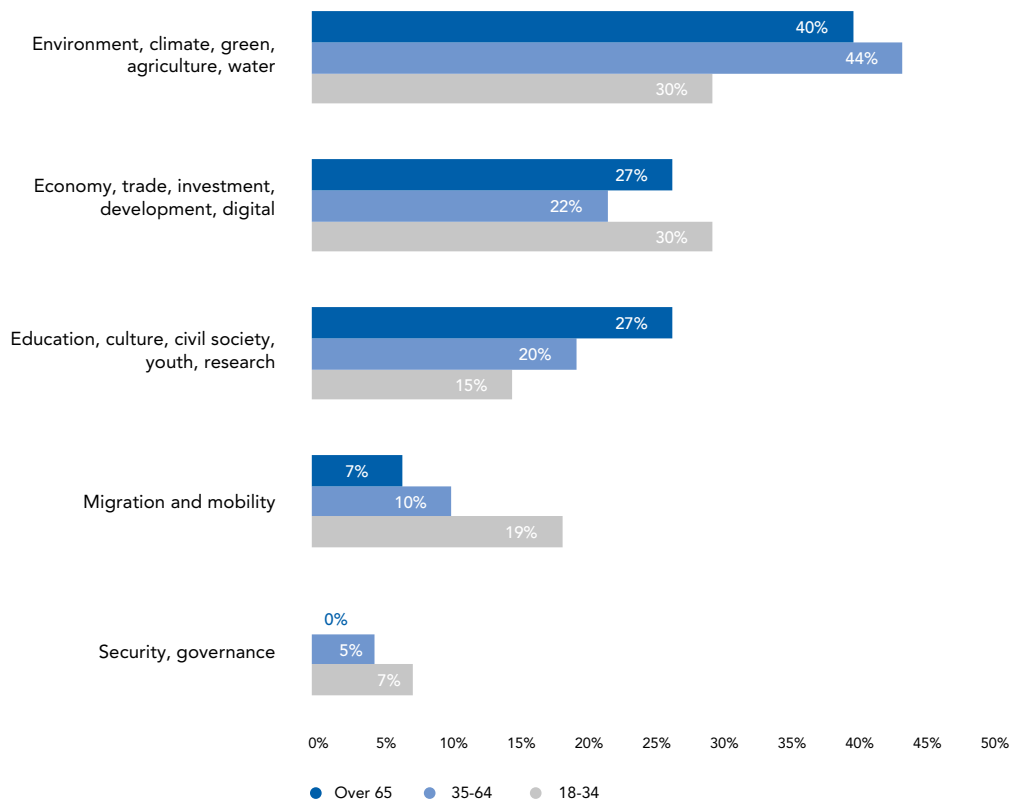
Graph 4: Q.2 In which specific areas can you bring forward positive examples of such increase role? (categories developed from open-ended answers for those considering that EU role/impact has INCREASED)



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

Disaggregating data by age, responses suggest a **differentiated generational lens-es on the EU's Southern Neighbourhood engagement**. Younger respondents considered an equally-increase impact on the green transition and digital-economic initiatives, while showing a comparatively **higher focus on migration and mobility** (see graph 5). Surprisingly, there was a relatively low mention of cultural or educational programming, compared to older age groups.

Graph 5: Q.2 In which specific areas can you bring forward positive examples of such increase role? (categories developed from open-ended answers for those considering that EU role/impact has INCREASED)



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

When asked to develop their answer, respondents detailed several examples related to cooperation in different fields:

Partnerships like PRIMA (Partnership for Research and Innovation in the Mediterranean Area) fund joint R&D on water management, sustainable agriculture, and climate adaptation –encouraging cross-border cooperation and knowledge transfer. Besides, the EU has increased funding and technical support for renewable energy projects (e.g., solar and wind farms in Morocco, Tunisia and Egypt). This has helped diversify energy mixes, reduce carbon footprints, and bolster local green economies.

— Spanish respondent

The Economic and Investment Plan (EIP) has earmarked significant funds for investments in renewable energy projects, energy efficiency measures, and sustainable infrastructure in the Southern Neighbourhood. Examples include potential support for solar and wind energy farms, grid modernization, and projects promoting water efficiency. While the full impact is yet to be seen, the commitment of funds signals a more proactive role in supporting the region's green transition, aligning with the EU's own climate goals.

— Lebanese respondent

One of the most notable areas of increased engagement has been energy cooperation, particularly in response to Russia's war in Ukraine. As the EU sought to reduce its dependence on Russian energy, it turned to Mediterranean partners, strengthening gas agreements with Algeria, Egypt, and Israel. Additionally, the EU has invested in renewable energy projects, particularly in Morocco and Tunisia, positioning the region as a crucial partner in Europe's green transition. These initiatives have deepened economic ties and reinforced the EU's strategic interests in the region's energy landscape.

— Italian respondent

Green energy: for example, the EU-Egypt partnership on green hydrogen (2022) and the Euro-Mediterranean solar project illustrates European leadership in the energy transition.

— Algerian respondent

Prominent examples include greater investment in communication with the Southern Neighbourhood via the spokesperson for the EU for the MENA region (as part of Task Force South), and a variety of investments and projects related to digitalization (as part of the EU's Global Gateway strategy), and as a goal in the EU's Neighbourhood, Development and International Cooperation Instrument - Global Europe, which finances a number of digital projects and initiatives under the Economic and Investment Plan.

— Dutch respondent

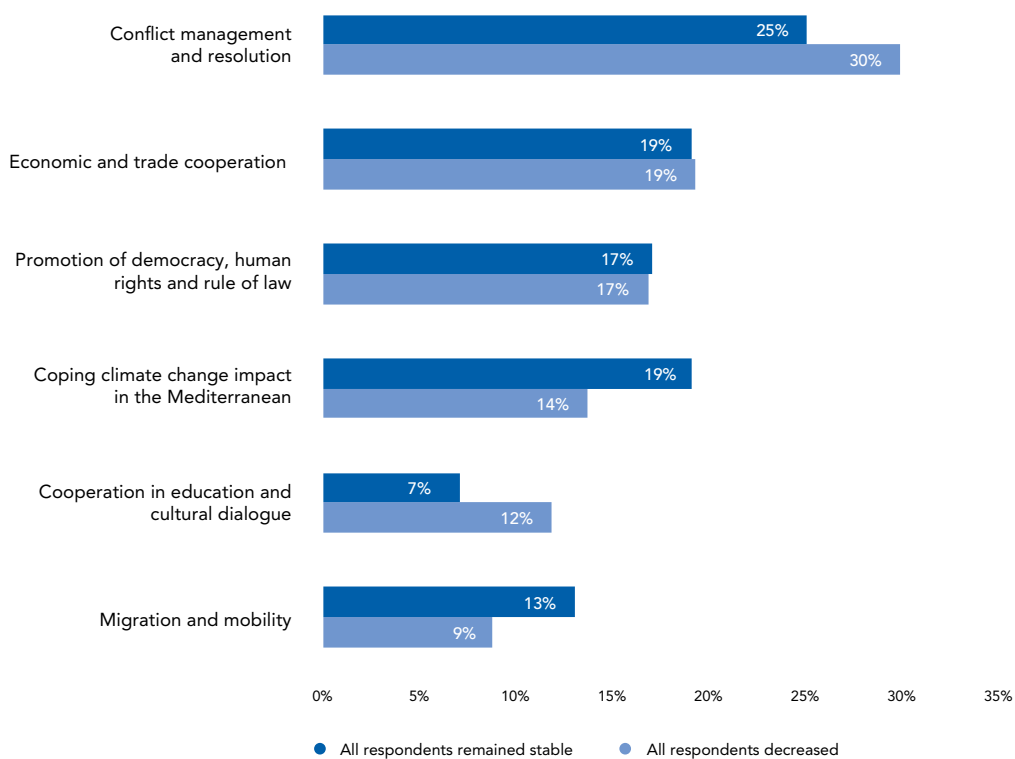
Cooperation in education, mainly through Erasmus+ projects facilitating access to higher education, vocational training, and youth exchanges. This is done through capacity building projects as well as mobility programs, and supports educational exchanges, research projects, and infrastructure development.

— Egyptian respondent

Question 3 was focused on those respondents that considered that the EU impact had decreased or remained stable in recent years. An open-ended question asked for those specific areas where they would have liked to see a more positive impact and stronger presence of the EU.

Overall results suggest that, **while conflict resolution remains the most urgent area for enhanced EU action, there is also concern about a declining EU impact across economic and trade cooperation, as well as in democracy and good governance promotion.**

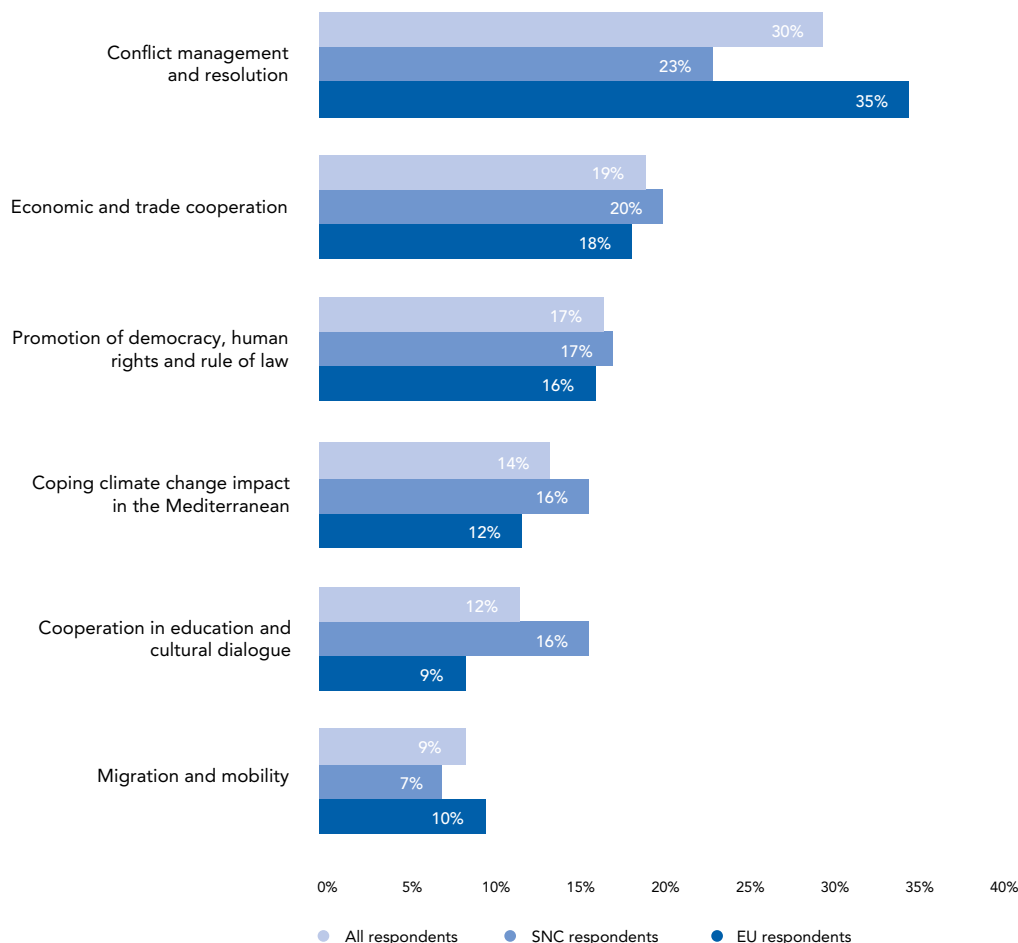
Graph 6: Q.3 In which specific areas would you have liked to see a more positive impact/stronger presence of the EU? (categories developed from open-ended answers)



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

Specific results showed that **EU respondents clearly considered that “Conflict management and resolution” has been affected**, while SNC respondents tend to spread their answers among the rest of options (see graph 7).

Graph 7: Q.3 In which specific areas would you have liked to see a more positive impact/stronger presence of the EU? (categories developed from open-ended answers for those considering that EU role/impact has DECREASED)



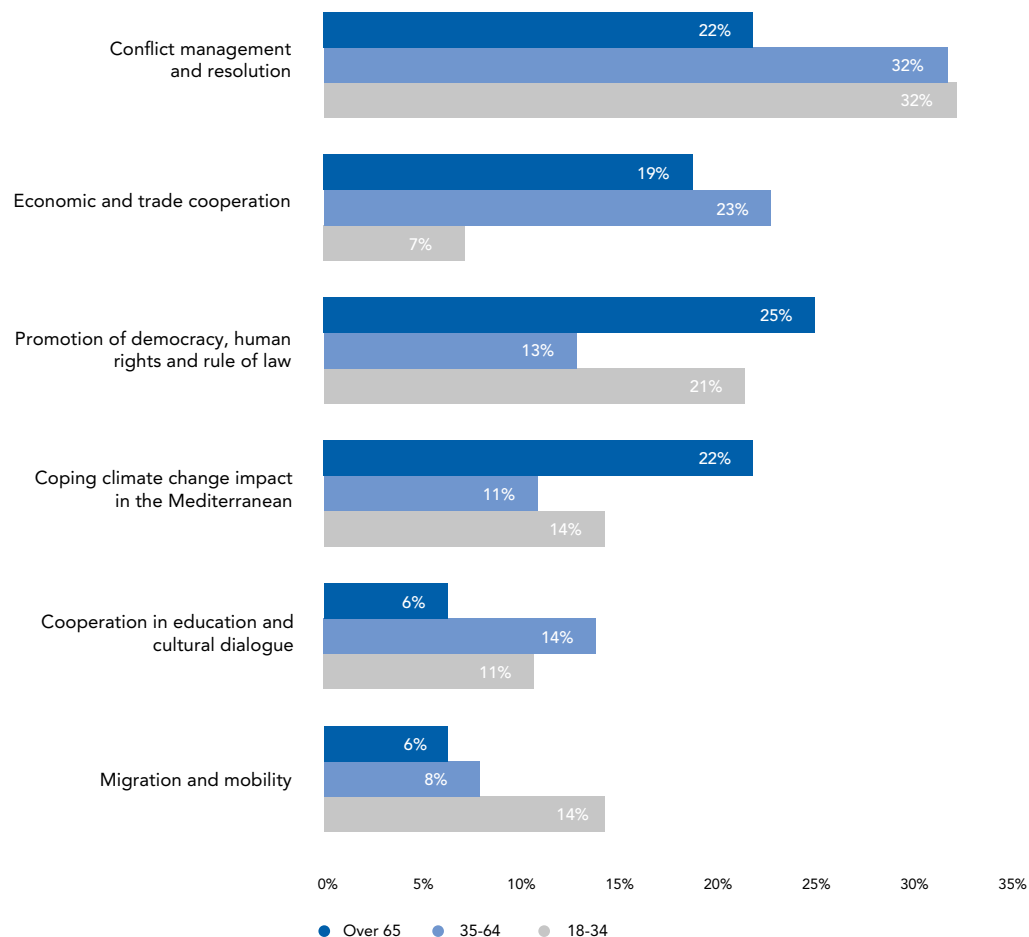
Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

Disaggregated results by age (graph 8) show differentiated trends when identifying the areas where the impact/role of the EU in the region has decreased.

Respondents over 65 put "Promotion of democracy" in first place and secondly, with the same percentages, "Conflict management" and "Coping climate change".

Younger respondents put "Conflict management" as a priority, ahead of "Promotion of democracy". "Economic and trade cooperation" obtained a rather low percentage of answers.

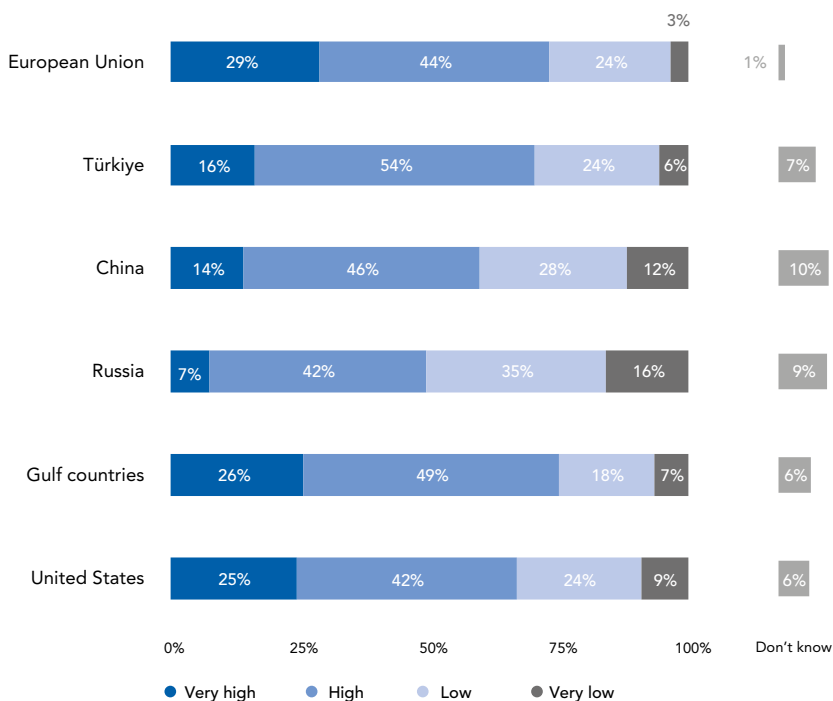
Graph 8: Q.3 In which specific areas would you have liked to see a more positive impact/stronger presence of the EU? (categories developed from open-ended answers for those considering that EU role/impact has DECREASED)



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

Question 4 explored the presence of actors playing a major role in the region. **The Gulf countries and the EU scored almost the same results as the most relevant actor**, followed by Türkiye and the United States, **while China and Russia obtained the higher % in low and very low answers** (see graph 9).

Graph 9: Q.4 In your opinion, to what extent are the following actors playing a major role in the Southern Neighbourhood?

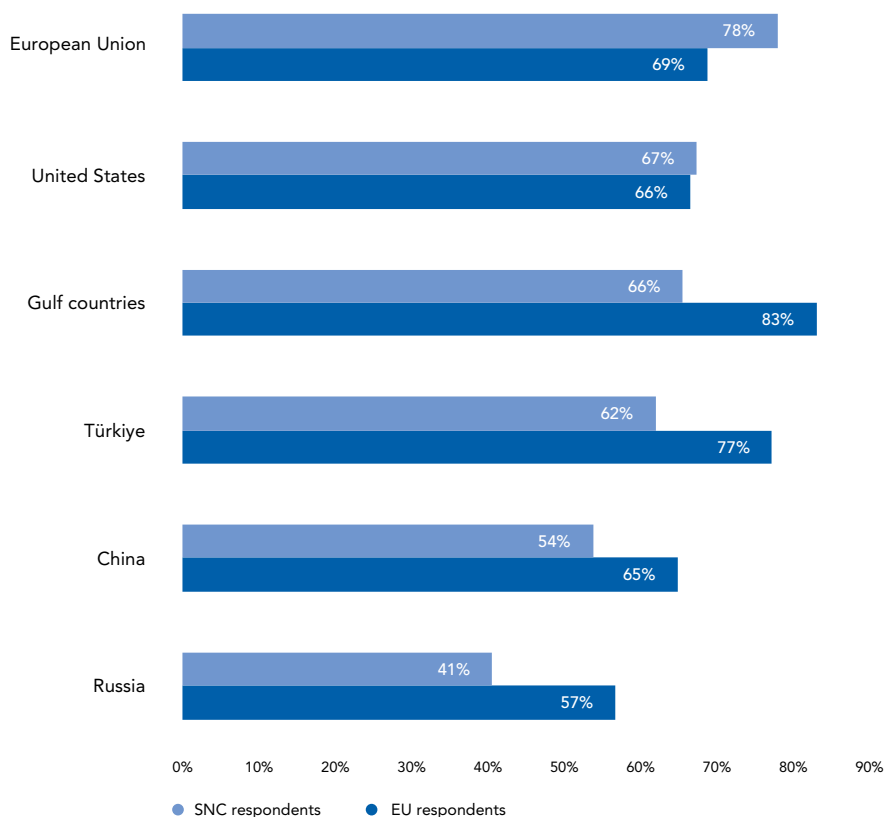


Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

A breaking down results by geographical origin, clearly shows a **differentiated vision between the Southern and Northern shore of the Mediterranean.**

EU respondents place the Gulf countries and Türkiye as most relevant actors, while SNC respondents put the EU clearly as first actor, followed by the United States and the Gulf countries. Beyond first positions, there is a common trend on the results for Gulf countries, Türkiye, Russia and China by which EU respondents tend to consider them as having higher role in the Southern Neighbourhood, compared to SNC answers (see graph 10).

Graph 10: Q.4 In your opinion, to what extent are the following actors playing a major role in the Southern Neighbourhood? (percentages of high and very high answers)



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

In the open comments on question 4, respondents provided more elaborate insights on the EU role in the region:

Gulf Countries and the EU are currently the core of the economy for the main South Med countries (Morocco, Egypt, Algeria and Tunisia). Türkiye is only more active in Libya but not as much in the rest. EU partnerships are usually very strategic and long-term and forward-looking. Gulf countries play economic rescuing work in the Southern Med countries and provide more political support and usually short-term economic engagements.

— Egyptian respondent

The EU remains a key economic and diplomatic partner in the region, but its impact is inconsistent. While it provides funding for infrastructure, development programs, and migration management, its influence is often hindered by bureaucratic delays, internal political divisions, and a reactive rather than proactive approach to regional challenges.

— Irish respondent

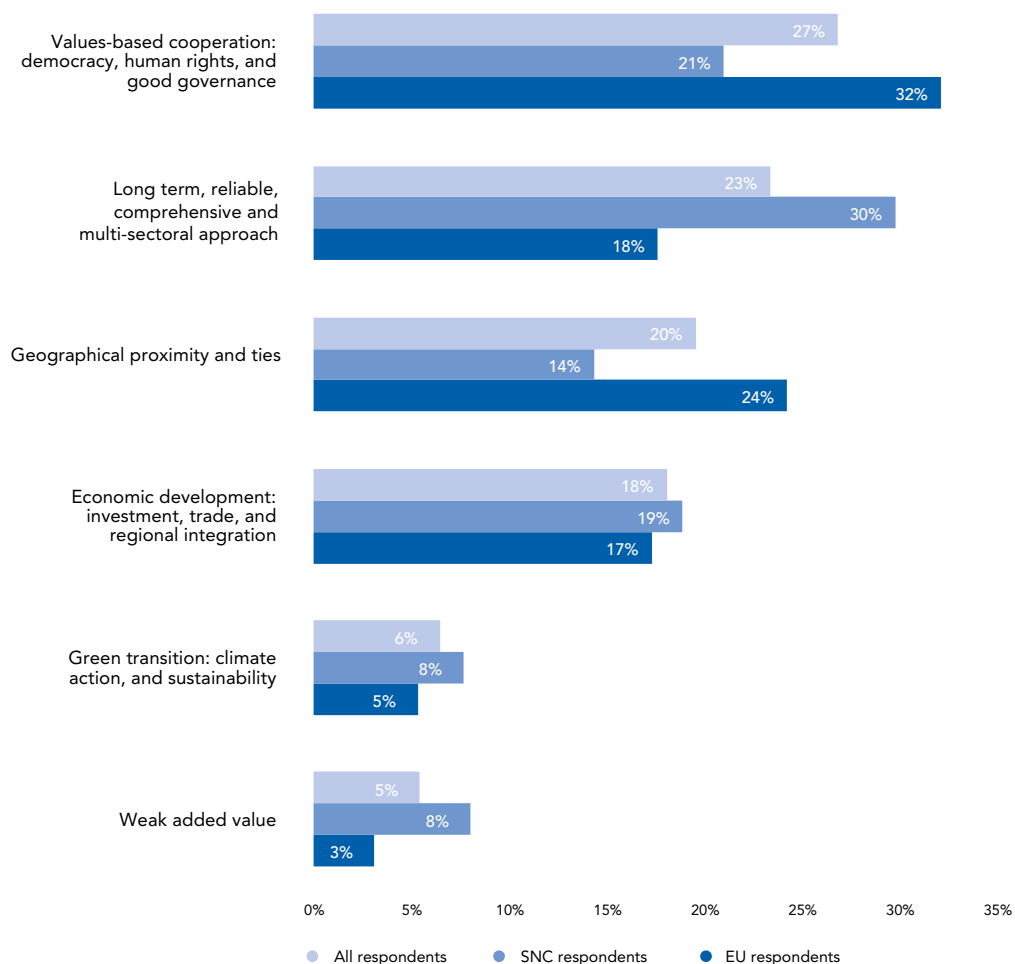
The EU plays a major role in the Southern Neighbourhood due to its geographic proximity, historical ties, and significant economic cooperation –particularly through partnership agreements and development aid. However, its influence is sometimes limited by internal divisions and a perceived overly bureaucratic approach.

— Moroccan respondent

Question 5 allowed respondents to elaborate on what the added value of EU cooperation is, compared to the other actors assessed in question 4.

Overall, respondents showed clearly that **“Values-based cooperation” is seen as the main element**. However, results by geographical origin of respondents displayed a differentiated trend. EU respondents put “Values-based cooperation” in first place followed by the importance of the “Geographical proximity and ties”. In its turn, **SNC respondents considered that the added value of the EU cooperation is based on its “Long term, reliable and comprehensive approach”**, while “Values-based approach” and “Economic development” obtained a similar percentage of answers.

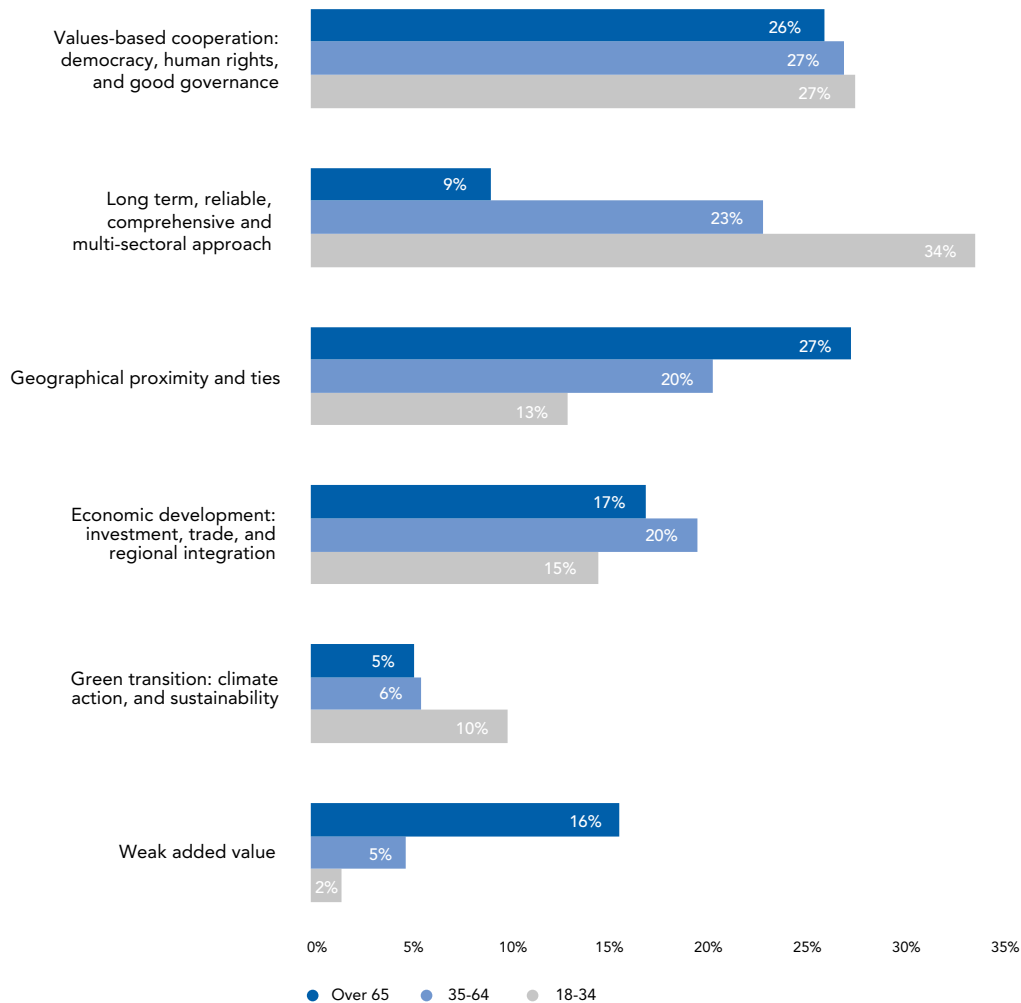
Graph 11: Q.5 In your opinion, what is the added value of the EU cooperation compared to the other actors? (categories developed from open-ended answers)



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

Again, disaggregated results by group of age showed some distinction. **One third of young respondents considered “Long term, reliable and comprehensive approach” as the main added value**, while older ones considered the “Geographical proximity and ties” as important as “Value-based cooperation”.

Graph 12: Q.5 In your opinion, what is the added value of the EU cooperation compared to the other actors? (categories developed from open-ended answers)



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

The EU's differentiated engagement gives more room to its partners to decide the closeness of ties and the amount of benefits offered; Southern partners can choose the fields of cooperation they wish to give emphasis on and the cooperation with the EU is formed based on –at least to a certain extent– mutually-decided interests.

— Greek respondent

The EU's cooperation with the MENA region offers a distinct added value through its emphasis on sustainable development, institutional reform, and long-term economic integration, unlike the transactional or security-driven approaches of the U.S., China, Russia, Türkiye, and the Gulf states.

— Moroccan respondent

Unlike other actors, the EU promotes structural reforms, governance support, and economic integration rather than purely transactional partnerships. Its trade agreements, investment frameworks, and energy transition initiatives provide stability and predictability. However, its impact is often weakened by internal divisions and slow decision-making.

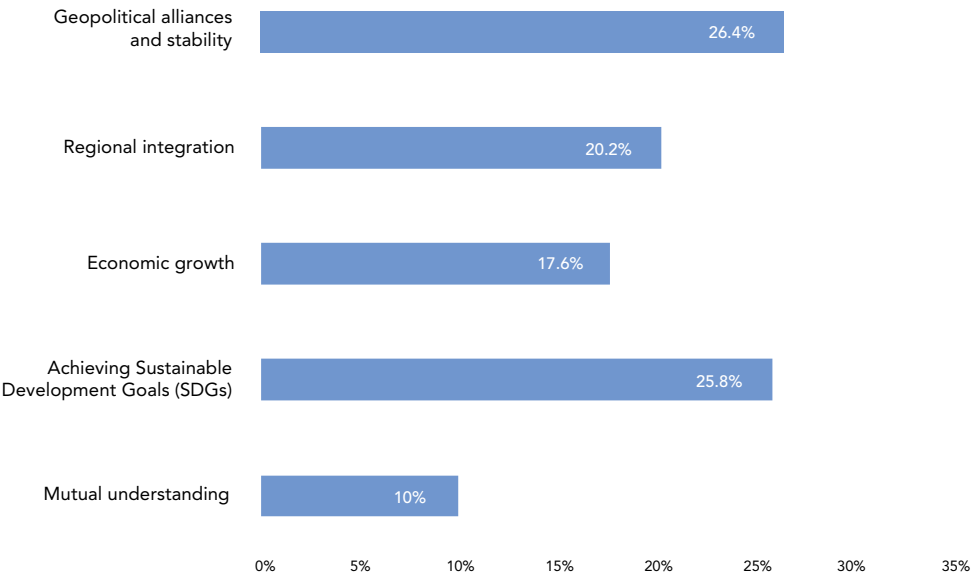
— Italian respondent

It is or at least seems to be less politicized than for other players. In recent years however, this too has changed because of the burning topic of migration. This has shifted aid and cooperation by the EU to become more politicized. Still though, the EU is more inclusive and provides support to a broad range of stakeholders and communities.

— Lebanese respondent

Question 6 was focused on identifying the best potential that can be achieved through the partnership between the EU and its Southern Neighbourhood. Overall answers depicted a combination of "Geopolitical alliances and stability" and "Achieving Sustainable and Development Goals".

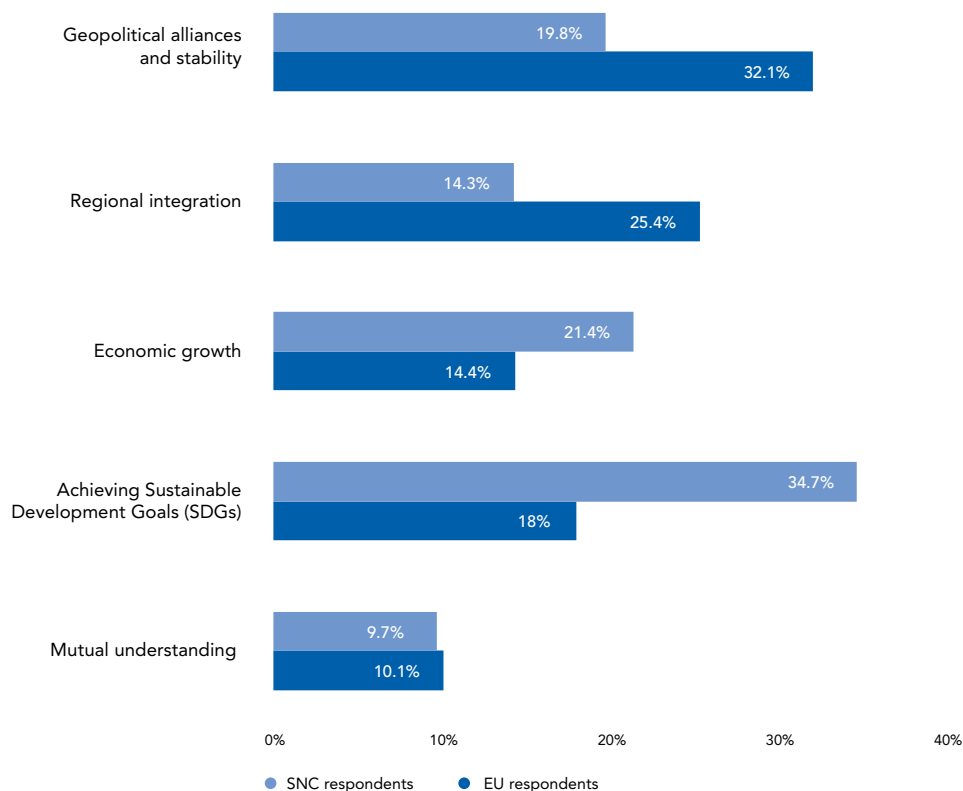
Graph 13: Q.6 In your opinion, what is the best potential that can be achieved through the partnership between the EU and its Southern Neighbourhood? (select only one option)



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

Breaking down the responses by geographical origin, results highlighted a rather differentiated pattern (graph 14). **EU respondents considered “Geopolitical alliances and stability” and “Regional integration” as the two best potential achievements, while SNC respondents put their preferences on “Achieving SDGs” and “Economic growth”.**

Graph 14: Q.6 In your opinion, what is the best potential that can be achieved through the partnership between the EU and its Southern Neighbourhood? (select only one option)



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

In the open comments explaining their answer, respondents further described the partnership potentialities:

Without political and security stability, it becomes difficult to implement long-term development plans or attract the necessary investments to boost the economy. The European Union plays a pivotal role in this regard. Moreover, programs like Interreg NEXT MED strengthen cross-border cooperation, thereby reducing conflicts and fostering trust among nations.

— Jordanian respondent

The partnership should focus on addressing the root causes of conflict, creating a peace-accepting climate, fostering reconciliation, and promoting inclusive governance. Even during the most intense crises, it is imperative to hold spaces where the parties involved can meet and maintain dialogue.

— Belgian respondent

The potential for deep regional integration goes beyond traditional economic collaboration, offering a pathway to enhanced geopolitical stability by creating interdependent economic networks that reduce conflict potential and incentivize diplomatic dialogue.

— Algerian respondent

If cooperation is based purely on economic factors, it risks under-looking other important aspects (climate, human rights etc.), while geopolitical alliances could be understood for the benefit of single countries and not the region (and the power imbalance between the EU and SN countries plays a role). Regional integration would be a way to guarantee more balanced and shared responsibilities.

— Italian respondent

The EU's development programmes are key to supporting economic growth and private sector –this is the area in which the EU has the most direct clout and impact. As for geopolitical alliances and stability, this is more and better influenced by member states and other nations in the lead.

— Lebanese respondent

Despite their geographical proximity, individuals from the northern and southern regions of the Mediterranean often harbour prejudices and fears towards one another. Enhanced cooperation between these areas can significantly mitigate these issues by promoting greater mobility of students and workers. Such initiatives have the potential to foster mutual understanding and appreciation, thereby bridging cultural divides.

— Portuguese respondent

Achieving SDGs offers an integrated approach: It promotes long-term stability and peace by addressing the underlying economic, social, and environmental challenges. By targeting the SDGs, the EU and its partners can ensure a more balanced, sustainable, and inclusive development model that not only addresses immediate concerns but also lays the foundation for long-term prosperity and stability in the region.

— Libyan respondent

As the SDGs are very transversal to the rest of listed issues, it seems natural that they be the basis through which the Partnership be established, in particular if there is the political will to fulfil them by 2030. Furthermore, progress to attain the SDGs is still to be made by EU and non-EU countries alike.

— French respondent

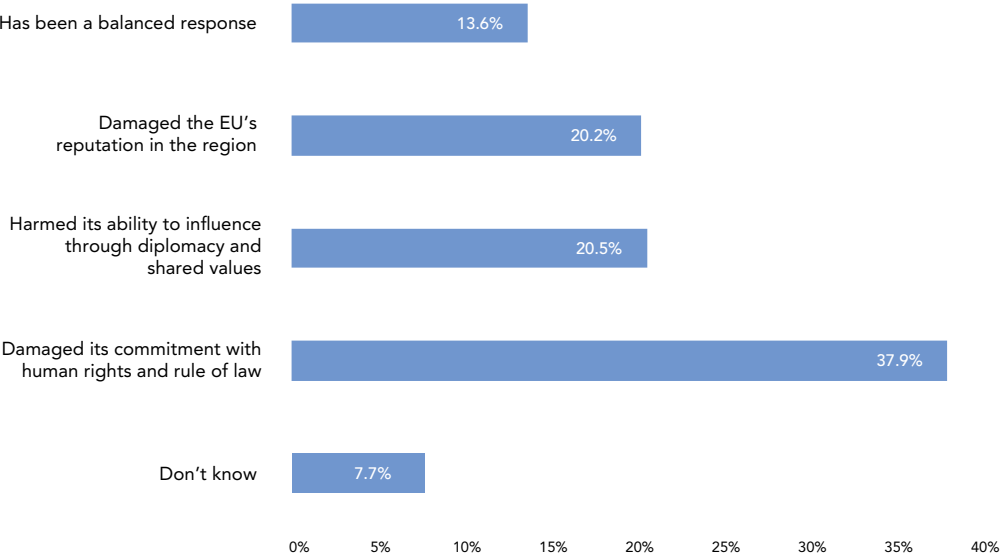
Mutual understanding should not be limited to those of governments and elites. It needs to be between the populations of the region since they have more at stake. A common understanding among these peoples can be a solid foundation for policies to tackle a wide array of challenges that everyone in the region faces

— Syrian respondent

Questions 7 and 8 were focused on the EU's response to the Israeli-Palestinian conflict, especially since October 7, 2023.

The first question explored the impact of the EU response, while the second was centred on the priorities for the Day-After scenario. **The EU's response to the conflict is widely viewed as undermining its core values and credibility in the region.** The largest percentage of respondents felt that it has **eroded the Union's commitment to human rights and the rule of law.** Nearly as many believe that **EU's response has weakened the EU's diplomatic influence and damaged its regional reputation,** while only a lower percentage of responses see the response as balanced.

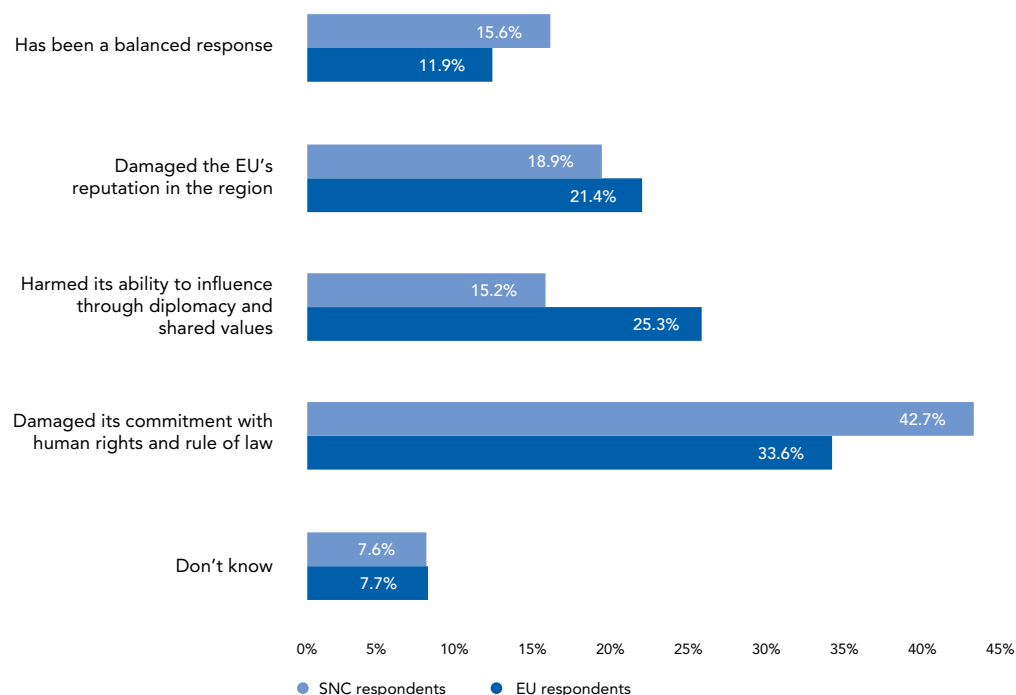
Graph 15: Q.7 In your opinion, the impact of the EU’s response to the conflict in Palestine (select only one option):



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

With a breakdown by geographic origin, both EU and SNC respondents agree that the EU’s response has most clearly undermined its commitment to human rights and the rule of law, but this concern is stronger among SNC respondents. EU respondents are somewhat more likely to say the response has harmed the EU’s ability to influence via diplomacy and shared values, and they also put slightly more weight on damage to the EU’s reputation in the region (see graph 16).

Graph 16: Q.7 In your opinion, the impact of the EU's response to the conflict in Palestine (select only one option):



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

In the open-ended comments, respondents developed the rationale behind their answer. In their explanations, there is a common trend that underlines **a perception of inconsistency and double standards** undermining the EU's credibility and its ability to influence on human rights and the rule of law.

While the EU is one of the largest donors to the Palestinian Authority and a strong supporter of the two-state solution, its ability to influence political outcomes on the ground has been constrained. Calls for ceasefires or investigations into violations of international law have often lacked enforcement or follow-up mechanisms, leading to criticism that the EU prioritizes stability over justice.

— Palestinian respondent

The EU's response did not lower its commitment to human rights and rule of (international) law, but conveying a complex message of standing against terrorism on the one hand, and standing against war crimes on the other hand, was not a message the EU managed to clearly. Each side took mostly the negative parts of what the EU was doing, disregarding the good parts. Eventually, it harmed the EU's ability to influence through diplomacy and shared values.

— Israeli respondent

The EU has demonstrated its willingness to apply double standards, which severely undermines its credibility with Southern Neighbourhood countries regarding its commitments to defend human rights and the rule of law –because the EU itself has been complicit in such violations, it largely forfeits its ability to demand that its partners uphold those same standards.

— French respondent

Critics often point to a perceived stronger condemnation of certain actions while being more lenient or slow to react to others. This perceived double standard undermines the EU's claims of upholding universal human rights and the rule of law.

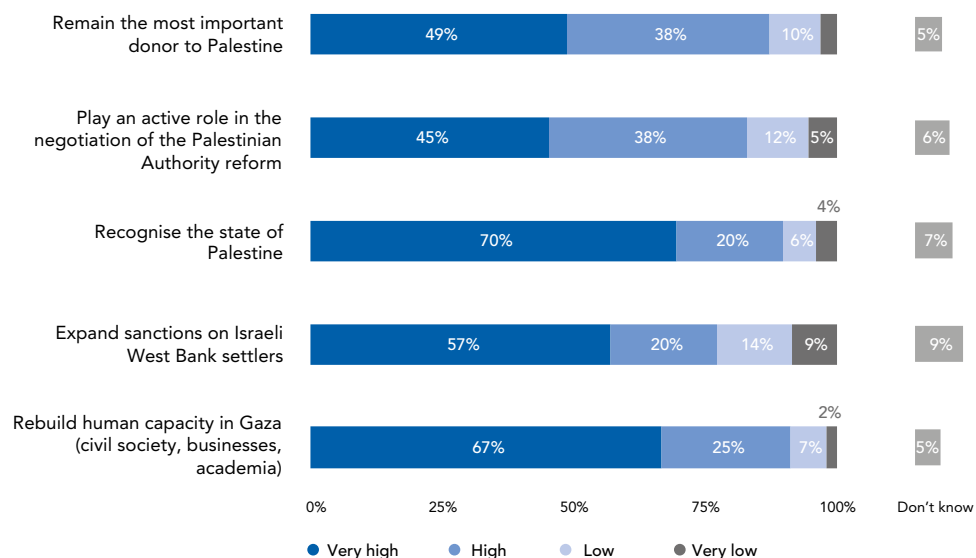
— Lebanese respondent

It seriously damaged its credibility in defending human rights, as well as its reputation in the region. The duality between the European Parliament and the European Commission also made the Union's response less transparent, clear and well positioned, silencing internal opposing voices –which were still elected.

— Italian respondent

As for the priorities to be effectively helpful in the Day-After scenario, respondents clearly showed their preference for the **recognition of the Palestinian State, together with the need to rebuild human capacity in Gaza** (graph 17).

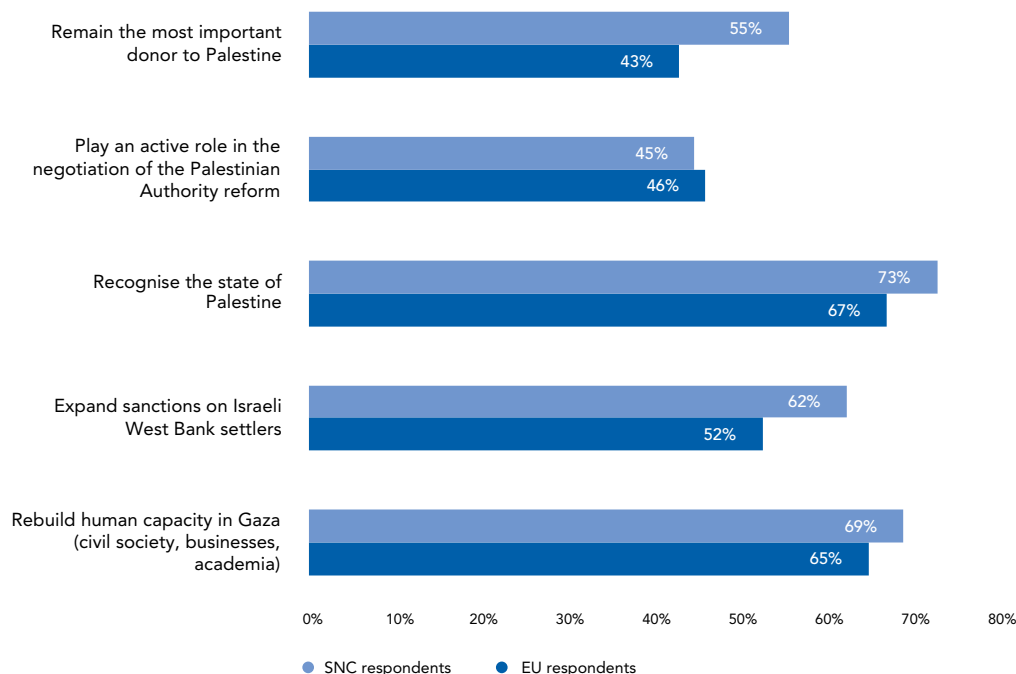
Graph 17: Q.8 In your opinion: to what extent should the EU prioritise the following elements, to be effective and helpful in the Day-After scenario?



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

Both EU and SNC respondents ranked the priorities in the same order, but SNC participants rated each element more strongly –most notably on maintaining the EU as the bigger donor and on expanding sanctions against West Bank settlers, where their answers exceeded the EU’s by about ten percentage points.

Graph 18: Q.8 In your opinion: to what extent should the EU prioritise the following elements, to be effective and helpful in the Day-After scenario? (percentages very high answers)



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

These are some comments on priorities for an effective and helpful support in the Day-After scenario:

For the EU to be more effective and supportive in the post-conflict phase, it must begin by focusing on humanitarian aid and reconstruction, followed by support for a political solution, then institutional reform and economic development, and finally security reforms and civil society –after initial stability has been achieved.

— Palestinian respondent

The political message is the most important. We have to set the policy before putting money on the table, otherwise 1) we are not clear on our intent and 2) we are only taken as payers, not players.

— Italian respondent

Expansion of sanctions on Israeli West Bank settlers is a needed move given rising levels of violence. It's best though to inflict the sanctions on organizations, not only individuals.

— Israeli respondent

The EU should also support Israeli civil society in its demands for more inclusive governance and a separation of powers, and an overall strengthening of democracy.

— Belgian respondent

The EU must balance immediate humanitarian needs with long-term political engagement. While financial support and governance reforms are essential, they must be accompanied by political measures to ensure Palestinians establish a viable and independent state according to their historical rights as the indigenous population under illegal occupation.

— Moroccan respondent

Although the EU does have influence on how the Day-After scenario will be formulated, it does not have enough political unity internally to hold a concrete and steady position. A 'technocratic' approach focused on investment and development is more acceptable and easier to implement.

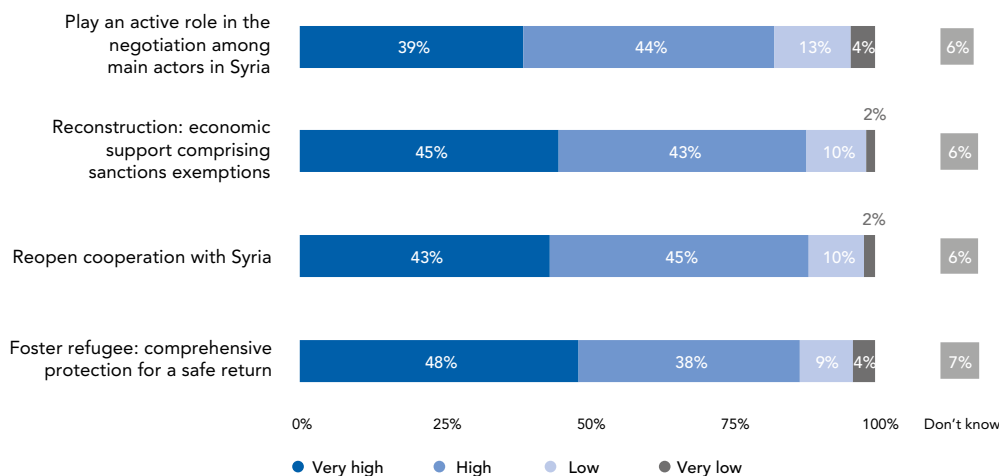
— Dutch respondent

When the Day-After comes, there may be no one left in Palestine. If the EU wants to frame itself as a superpower, it has to act like one. All the listed items above are needed but more importantly, the genocide has to stop. How can we, in the region, feel neighbourly to the EU when they look the other way.

— Egyptian respondent

Question 9 aimed to identify priorities of cooperation and action in **Syria** in the new scenario opened with the fall of Assad's regime. Overall results indicated (with no remarkable differences between EU and SNC respondents) that best option should be a **combination of political tools (active role in the negotiation among actors) economic aid (for reconstruction), a reopening of cooperation with the country and protection measures for the safe return of refugees.**

Graph 19: Q.9 In your opinion: to what extent should the EU prioritise the following elements to be effective and helpful in the new Syrian scenario/Syrian transition?



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

Out of the predefined answers, respondents could propose other options considered by them:

Ensure that the humanitarian agenda (and human capital-centred recovery) is not overlooked in discussions regarding recovery and reconstruction.

— Belgian respondent

Support human rights organizations and ensure support for activists returning from the EU and protection in case of danger.

— Egyptian respondent

Suspend any judgement until the real approach of the newly established and self-declared Syrian Administration shows what they believe in.

— Italian respondent

Avoid negative conditionality for economic support, reconsidering the EU-Türkiye relations.

— Italian respondent



Euro-Mediterranean cooperation frameworks and mechanisms

This section of the Euromed Survey 15 aimed to identify the key components of effective cooperation, focusing on how to structure its elements, establish clear priorities, strengthen the role of regional mechanisms, and leverage the Global Gateway initiative alongside strategic infrastructure investments to promote deeper regional integration.

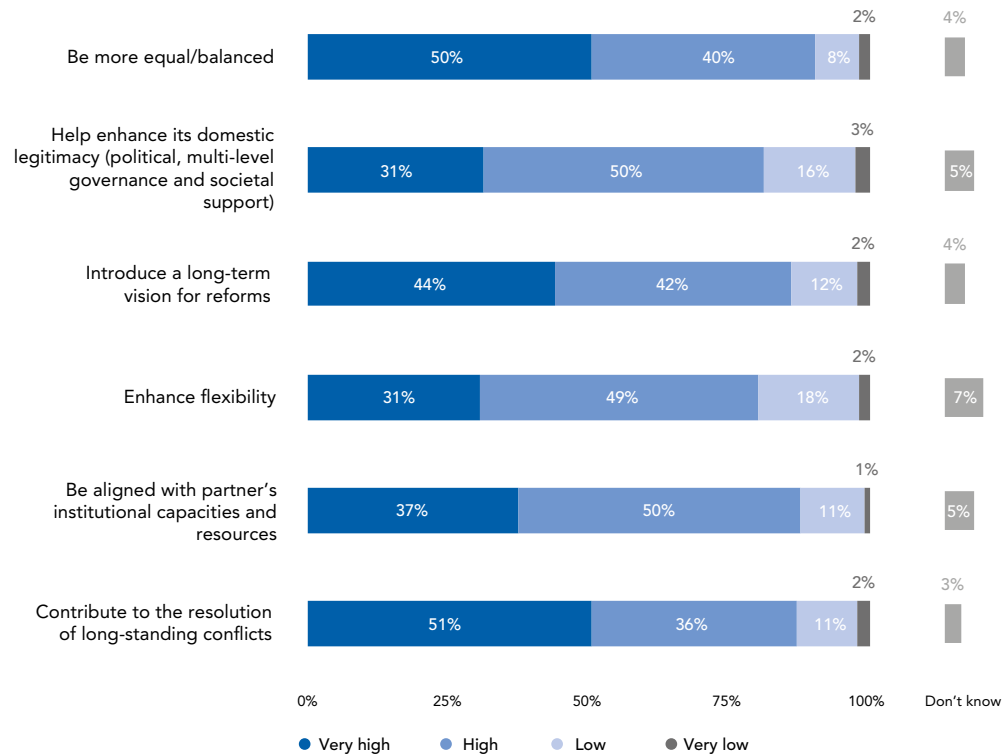
Main Findings:

- The EU's relations with Southern Neighbourhood partners should be based on a more equal and balanced footing, while also contributing to the resolution of long-standing conflicts.
- To better engage with the Southern Neighbourhood, shaping a stronger partnership model should be the priority of the New Pact for the Mediterranean.
- In the Pact's future toolbox, investment instruments are viewed as the top priority. SNC respondents also highlighted the need for greater donor coordination, such as through Team Europe Initiatives.
- In identifying areas to prioritize for the New Pact's partnerships, respondents reached a clear consensus around "Economic development, trade, and investment" as the foremost priority, followed by "Environment and climate-change adaptation."
- When rating the importance of specific elements within the framework of the New Pact for the Mediterranean, "Fostering talent and skills" and "Intensifying cooperation on climate adaptation" emerged as main priorities.

- Overall results showed consistent support for considering the Union for the Mediterranean (UfM) as a unique platform where mutual interests are pursued on an equal basis, and suggested the UfM could explore new avenues to promote regional cooperation mechanisms.
- Most respondents identified “Working with other regional actors to improve high-level dialogue with the neighbours of our neighbours” as the top priority to guide the UfM’s reform.
- There was an overall positive perception of the Global Gateway strategy’s potential in the region, with its broadest impact seen in “Upscaling employment in sustainable, digital, and entrepreneurial sectors,” Followed by “Improving physical infrastructure.”
- For projects already implemented, most respondents agreed that all infrastructure options are important for regional integration, particularly “digital connectivity” and “Sustainable transportation corridors.”

Opening this block, **Question 10** proposed to explore how the EU’s relations with Southern Neighbourhood partners should be. The elements with top “very high” percentages (up to 50%) referred to a **“More equal/balanced” relation, as well being able to “Contribute to the resolution of long-standing conflicts”**.

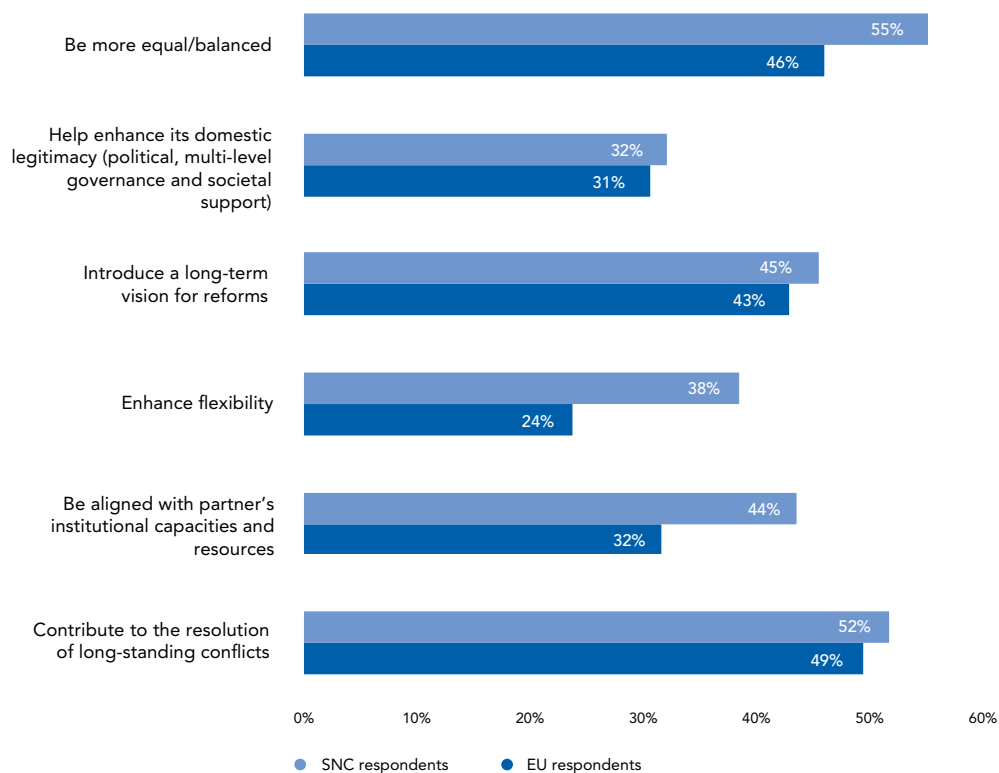
Graph 20: Q.10 To what extent should the EU's relations with Southern Neighbourhood partners...



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

A breakdown of results by geographical area (graph 21), offered a nuanced picture. SNC respondents tended to answer with higher percentages of "very high" extent, and compared to EU participants, **SNC respondents considered in higher percentages the need to "Enhance flexibility" and aligning EU relations with partner's institutional capacities and resources.**

Graph 21: Q.10 To what extent should the EU's relations with Southern Neighbourhood partners... (percentages very high answers)



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

In their open comments, respondents elaborated on how the EU's relations with the Southern Neighbourhood should be shaped:

Ensuring a more balanced (rather than equal) cooperation is key, albeit challenging. Importantly, introducing a long-term vision for reforms is key, but this requires both EU and Southern Partners to be equally invested in this thinking. Being aligned with the partner's institutional capacities and reforms is very important, because experience has shown that when local ownership is lacking, reform does not lead to lasting change.

— Tunisian respondent

The 'balance' question is a bit doubtful, since power relations and possibilities to exercise influence are what they are. The EU needs to focus on supporting the kinds of chances it wants to see by providing incentives but not trying to decide what happens. It needs to live up to its own values, especially regarding rights, democracy and open exchange, even when these are under pressure. This means defining red lines and being prepared to respect them, when partners don't.

— German respondent

The EU will gain credibility if it prioritises a more inclusive approach, taking into account the real needs of local civil societies and adopting a more coherent stance towards regional conflicts.

— Algerian respondent

Relations between the EU and its Southern Neighbourhood must become more balanced, co-created, and tailored to local realities. The EU should support a long-term vision by strengthening its partners' legitimacy through inclusive reforms, citizen participation, and shared governance. To be more effective, cooperation must also become more flexible and better integrate non-institutional actors such as universities, civil society, and youth.

— French respondent

The EU needs to shift from a transactional approach to diplomacy toward building strategic, equitable partnerships that focus on common challenges (such as conflicts and climate change) while empowering societies in the Global South. The EU can restore trust and promote regional stability by addressing immediate needs and long-term transformative goals.

— United Kingdom respondent

The European Union must strive to contribute to resolving ongoing conflicts through diplomatic mediation and development support. Cooperation with partners in the Southern Neighbourhood should focus on regional stability and combating long-standing conflicts that affect sustainable development.

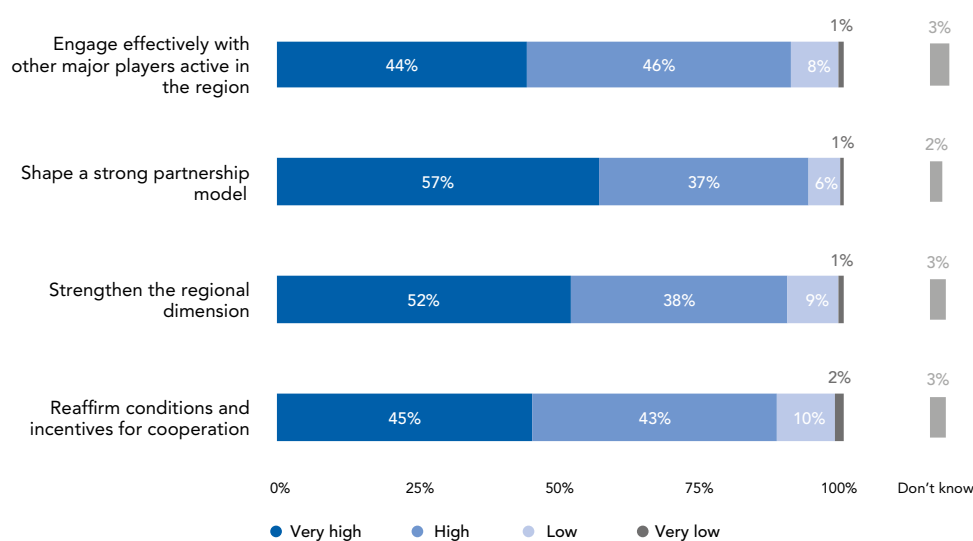
— Tunisian respondent

It is not about legitimising partners, but engaging with them and accepting local governance, with its strengths and weaknesses.

— Italian respondent

Question 11 focused on specific elements that the New Pact should include in order to better engage with the Southern Neighbourhood. Overall, the results indicate support for a combination of the four proposed elements, with particular emphasis on “Shaping a strong partnership model” –nearly 60% of respondents rated this element as of “very high” importance. Notably, in the open-ended responses where participants could suggest additional elements, several highlighted the need to strengthen the role of existing Euro-Mediterranean networks –such as those involving academia, civil society, and think tanks– in fostering cooperation.

Graph 22: Q.11 Under this New Pact, to what extent should the following elements be useful to better engage with the Southern Neighbourhood partners?



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

A stronger regional dimension should be at the very basis of the New Pact, as a pre-condition to enhance cooperation in several areas where bilateralism necessarily leads to limited results. Engaging effectively with other major players active in the region: trilateral cooperation, namely with Gulf countries, will be increasingly needed, but it is key for the EU to engage in patterns of cooperation where its norms and values are not compromised.

— Italian respondent

By integrating all these elements and adjusting them to each partner, the EU can enhance its influence and support long-term, sustainable partnerships in the Southern Mediterranean. However, the success of this approach will depend on its ability to address the diverse political realities and engage effectively with both regional and global actors.

— Moroccan respondent

The New Pact, should aim at strengthening partner countries through promoting bottom-up approach where local authorities, communities and CSOs can share their local know-how and co-create mechanisms that will better withstand shocks, face adversity and allow for quicker recovery.

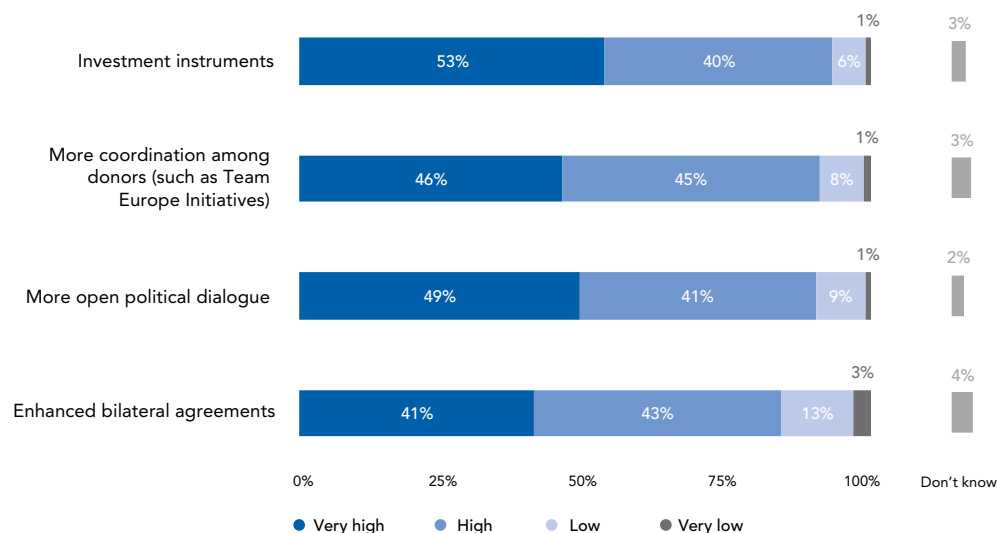
— Belgian respondent

The entire Euro-Med cooperation mechanisms require a new vision that takes into consideration the different realities, interests and new geopolitical dynamics in Europe, the MENA region and globally. First, the EU must recognize the increasing importance of partners like the GCC and Türkiye and engage with those partners to coordinate actions in matters of common interest. Second, it must stress on a regional component that avoid further fragmentation, especially in North Africa.

— Algerian respondent

Question 12 assessed the priorities for a toolbox, and thus, asked for the importance of different instruments to structure partnerships under the New Pact. Respondents clearly agree on the importance of all the proposed options, being “Investment instruments” the option that received a higher percentage of answers.

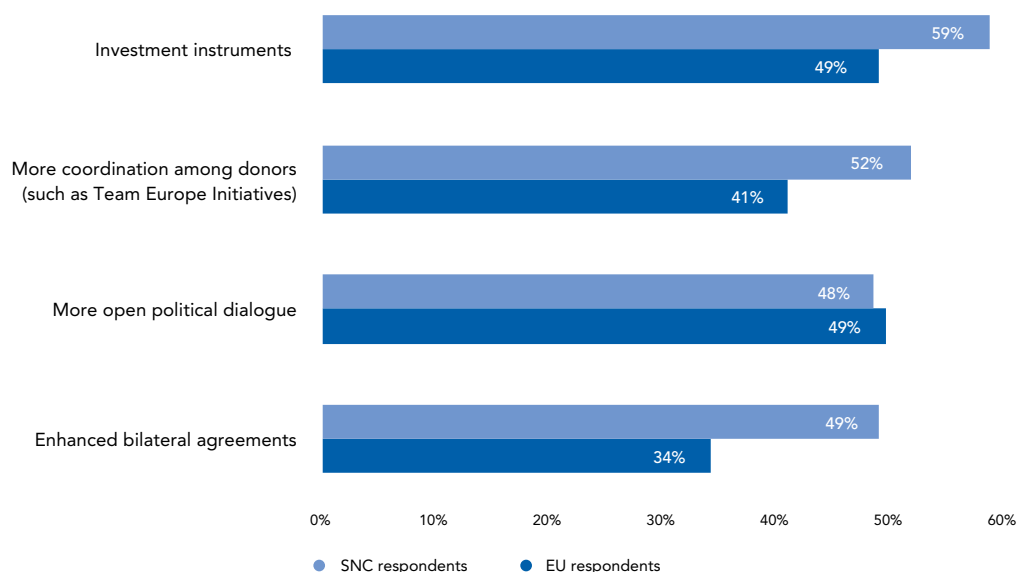
Graph 23: Q.12 To what extent are the following elements/tools important to structure these partnerships?



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

Breaking down the results by geographical area (graph 24) revealed similar trends in both Northern and Southern countries. However, respondents from the Southern Neighbourhood showed stronger support for all proposed measures –outperforming their Northern counterparts by 15 points on “Enhanced bilateral agreements” and by 10 points on “Investment instruments” and “More coordination among donors”. Only for “More open political dialogue” did EU respondents recorded higher support than those from the Southern Neighbourhood.

Graph 24: Q.12 To what extent are the following elements/tools important to structure these partnerships? (percentages very high answers)



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

Opened comments to the question offered further detailed descriptions of respondents' answers:

The New Pact for the Mediterranean should prioritize investment instruments and donor coordination as key tools for driving development and maximizing impact. While open political dialogue and enhanced bilateral agreements are important, they should be integrated into a broader regional strategy that promotes cooperation and addresses shared challenges.

— Tunisian respondent

To achieve trade integration, which would reflect on job creation, it would be important to develop new generation of trade agreements including inclusive and green goals. Most important would be for the countries of the region to commit to the agreements and implement them in the correct way.

— German respondent

Investment instruments and political dialogue are certainly very important, but the key ones are definitely to have a much better coordination among donors who tend to launch projects and programmes that sometimes overlap.

— Lebanese respondent

The EU should focus on sustainable, long-term investments that promote economic independence rather than dependency on aid. Political dialogue must be inclusive, ensuring that civil society, media, and youth voices are heard alongside governments.

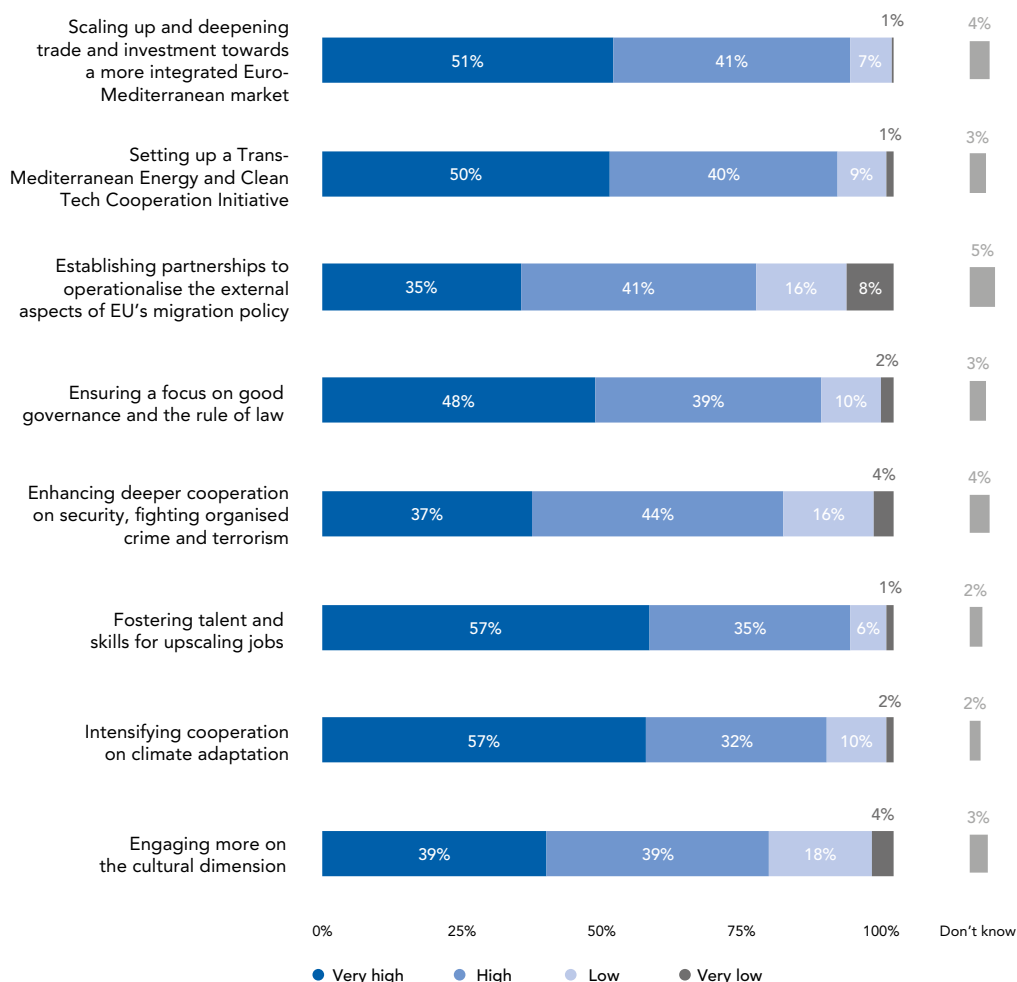
— Irish respondent

Together, these tools can shape partnerships that are more effective, transparent, and responsive to the needs of both the EU and its Southern Neighbourhood partners. However, their success depends on the political will of all parties and the capacity to implement the commitments made.

— Moroccan respondent

Question 13 asked participants to rate the importance of specific elements within the framework of the New Pact for the Mediterranean. Overall, **“Fostering talent and skills”** and **“Intensifying cooperation on climate adaptation”** emerged as the top priorities, with nearly 60% of respondents considering them very highly. Close behind, “deepening trade investments” and “Trans-Mediterranean energy and clean-tech cooperation” were also rated “very high” by roughly half of those surveyed. Options on **“Security cooperation”** and **“External aspects of EU’s migration policy”** obtained lower percentages.

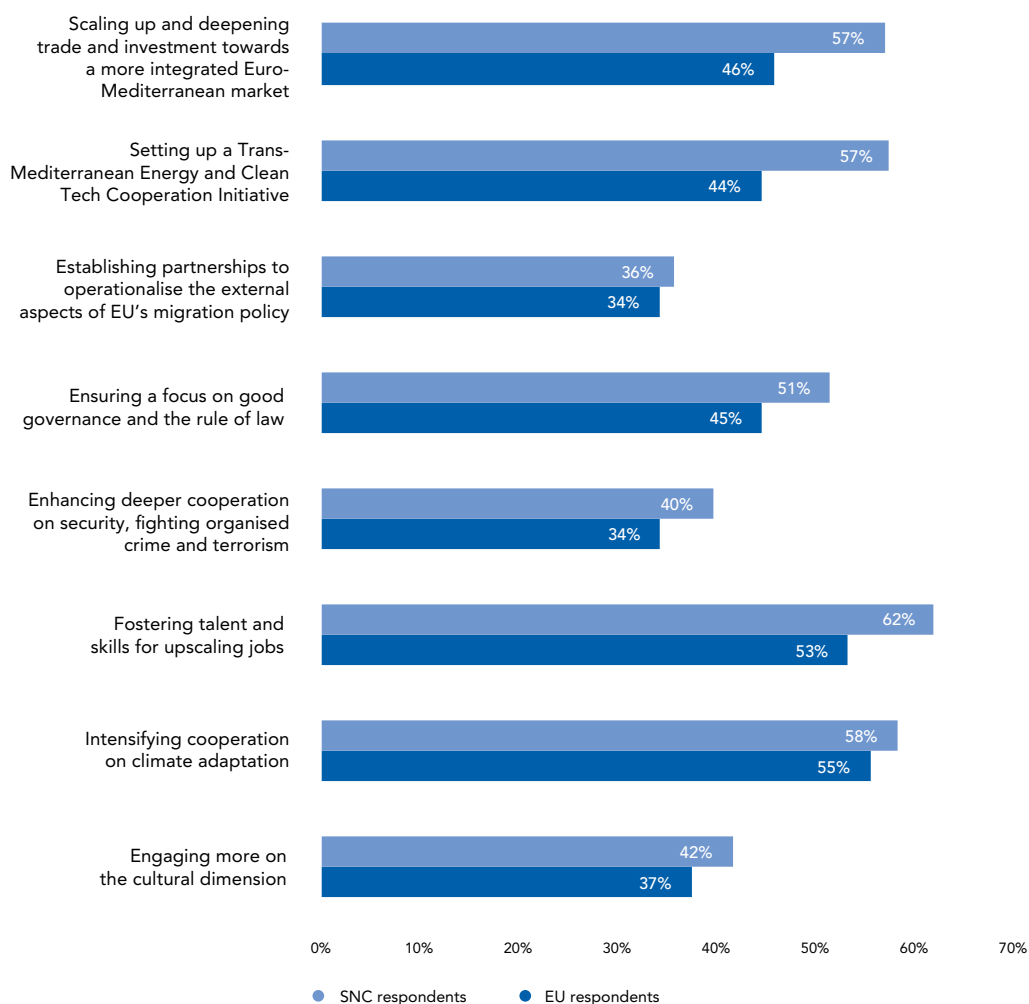
Graph 25: Q.13 To what extent do you consider the importance of the following elements in the framework of the New Pact for the Mediterranean?



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

As in the question on the toolbox, **regional breakdown (graph 26) revealed similar trends in both Northern and Southern countries**, however respondents from the SNC rated higher percentages on “very high” option for all proposed measures, particularly for “Trans-Mediterranean energy and clean-tech cooperation” and “Deepening trade investments” which exceeded EU respondents by 13 and 11 percentage points respectively.

Graph 26: Q.13 To what extent do you consider the importance of the following elements in the framework of the New Pact for the Mediterranean? (percentages very high answers)



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

Some of the open comments elaborated on how cooperation in these sectors should be structured:

It is important to take into account the differences among partner countries and to adapt strategies according to local needs and capacities. In addition, emphasis should be placed on building institutional capacities and enhancing civil society participation to ensure the long-term sustainability and effectiveness of these initiatives.

— Jordanian respondent

Everything is important; however, be careful not to overemphasize –or present as a prerequisite– the security and migration dimensions. While these are certainly critical issues, the other pillars of the Pact should be given greater prominence, as they represent shared priorities (EU and Southern partners) and are inherently engaging, energizing, and positive.

— French respondent

A holistic approach is necessary for the Pact to be effective. Prioritizing economic resilience, governance, climate action, and human capital development will ensure long-term stability and prosperity in the region. The EU should emphasize partnerships based on mutual benefit rather than a one-sided approach focused only on crisis management.

— Lebanese respondent

In energy and adaptation matters, it is important to ensure ownership to communities affected and involve them in the process. Taking mitigation measures to avoid that such initiatives have a negative impact on disadvantaged groups is also needed.

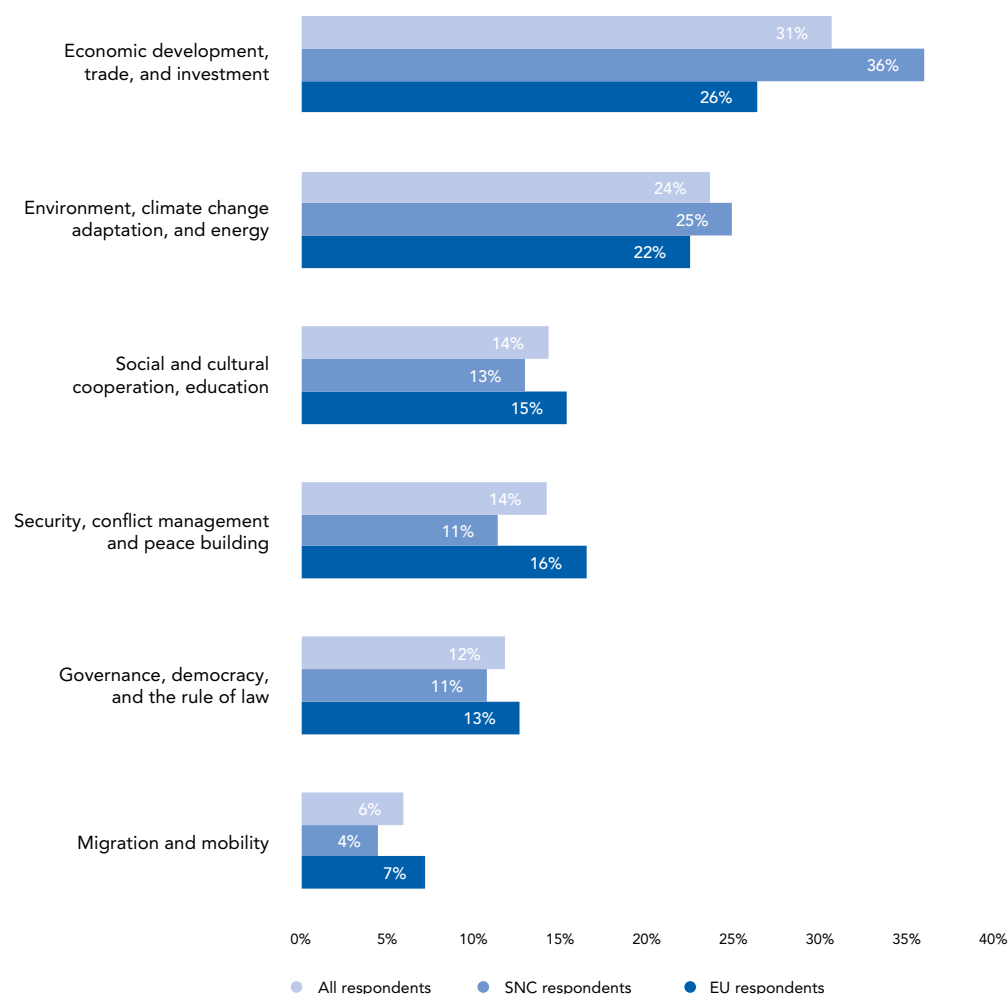
— Italian respondent

Focus on people who should benefit from the engagement. When this is done, both sides of the Mediterranean will be better off.

— Egyptian respondent

Question 14 was open-ended, and aimed at identifying which areas should be prioritised in the Pact's partnerships. Results showed a **clear consensus around "Economic development, trade and investment"** as the main priority, **followed by "Environment and climate change adaptation"**. Results by geographical region showed that **SNC respondents considered economic development priorities in higher percentages**.

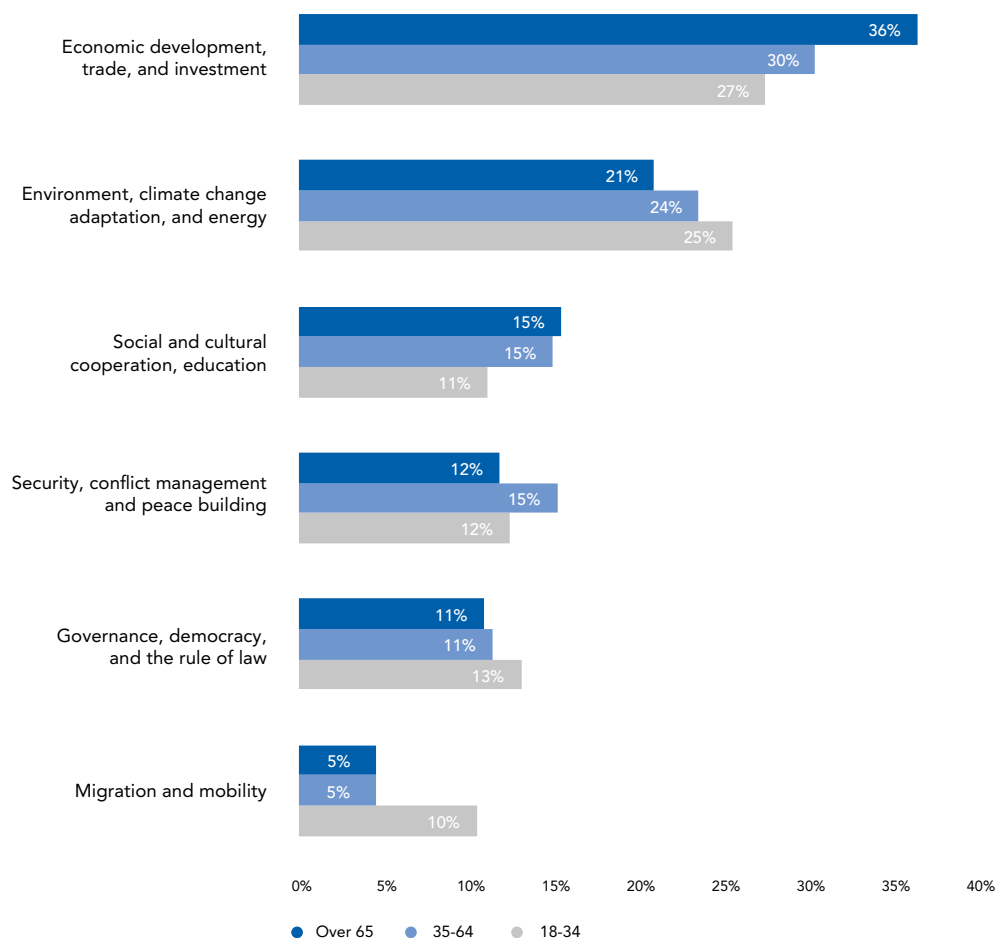
Graph 27: Q.14 Which areas should those partnerships prioritise?
(categories developed from open-ended answers)



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

Disaggregating data by age groups (graph 28), results show a similar order of priorities. **Among younger respondents (18-34), the pattern holds but with a stronger emphasis on environmental cooperation**, as percentages of young respondents were almost as important as economic development.

Graph 28: Q.14 Which areas should those partnerships prioritise? (categories developed from open-ended answers)



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

In the open comments, some respondents justified their choice on the areas to be prioritized:

A young, growing population in the Southern Mediterranean needs education and skills development to prevent economic stagnation and migration pressures. Economic integration would drive growth, job creation, and stability.

— French respondent

Smarter Mediterranean: there's a strong need for efforts towards improvement of human capital in the region.

— Qatari respondent

Investing in education and skills development is key to building human capital, empowering youth, and promoting social inclusion. Promoting cultural exchange and people-to-people contacts can foster mutual understanding, dialogue, and cooperation among diverse communities.

— Libyan respondent

Climate and energy matters should be at the top of the agenda, as they act as mega-drivers and threat multipliers, able to undermine overall stability in the area. (...) This will help MENA countries to attain a self-sufficiency based on renewable energy and not on fossil fuels, while also minimising other threats.

— Greek respondent

Respondents also commented on how to better cooperate in the partnerships framework:

Partnerships should focus on promoting sustainable economic growth by supporting infrastructure projects, entrepreneurship, and small and medium-sized enterprises (SMEs). This fosters stability and reduces economic disparities.

— Albanian respondent

The New Pact has to open its governance to regional and local authorities and not only at national level.

— Spanish respondent

There is a great deal of suspicion and mistrust between the populations of the EU and the Southern Neighbourhood countries. This mistrust acts as an obstacle to cooperate in tackling the most pressing issues facing the world today.

— Syrian respondent

Post-conflict reconstruction is an area of urgent need in several countries, where the EU can show what it can do in relation to other actors, especially China and the Gulf countries.

— German respondent

War is enemy of development; thus, peace-building means structural changes and reforms not only a plan or a conference. Furthermore, without justice, the path forward doesn't exist.

— Jordanian respondent

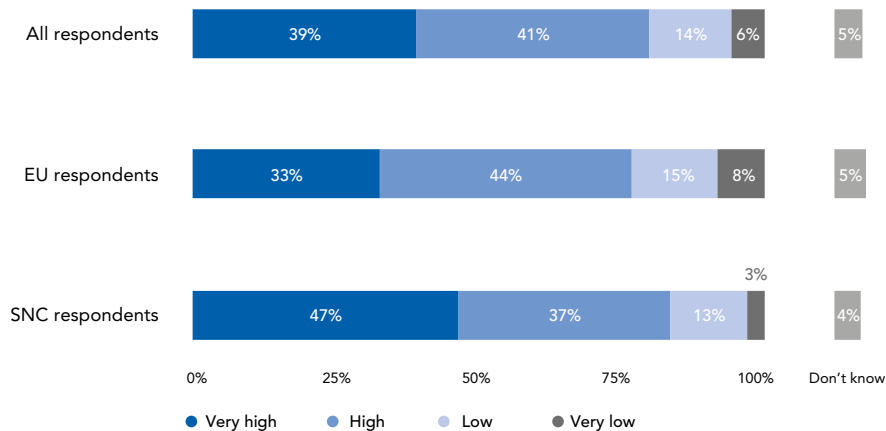
The EU's previous approaches have often been too reactive and transactional, but long-term success requires building local capacity, fostering resilience, and ensuring that cooperation is mutually beneficial rather than one-sided.

— Italian respondent

Question 15 aimed at identifying if the **Union for the Mediterranean (UfM) offers a unique platform where mutual interests are pursued at an equal level**, and if the **UfM can seek new avenues to promote regional cooperation mechanisms**. Overall results display a consistent support for both statements. To be mentioned that **SNC respondents showed a higher agreement with it**, particularly when looking at “very high” percentages with 14 points more than EU respondents.

Graph 29: The Union for the Mediterranean (UfM) can offer a unique platform where mutual interests are pursued at equal level, and to seek new avenues to promote regional cooperation mechanisms.

Q.15 To what extent do you agree with this proposal?



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

When asked to explain their choice, respondents gave a variety of reasons, while also highlighting areas where there might still be room for improvement:

The UfM is a mechanism that already exists but requires reforms. It is indeed a unique place of exchanges, but more efforts are needed to first, push partners to be more engaged and second, clearly define upcoming priorities that align with the new realities of the region.

— Algerian respondent

Although established as broad and, quite frankly, rather soft and loose international organisation, its potential is nonetheless unbound. Thus, its role should be updated.

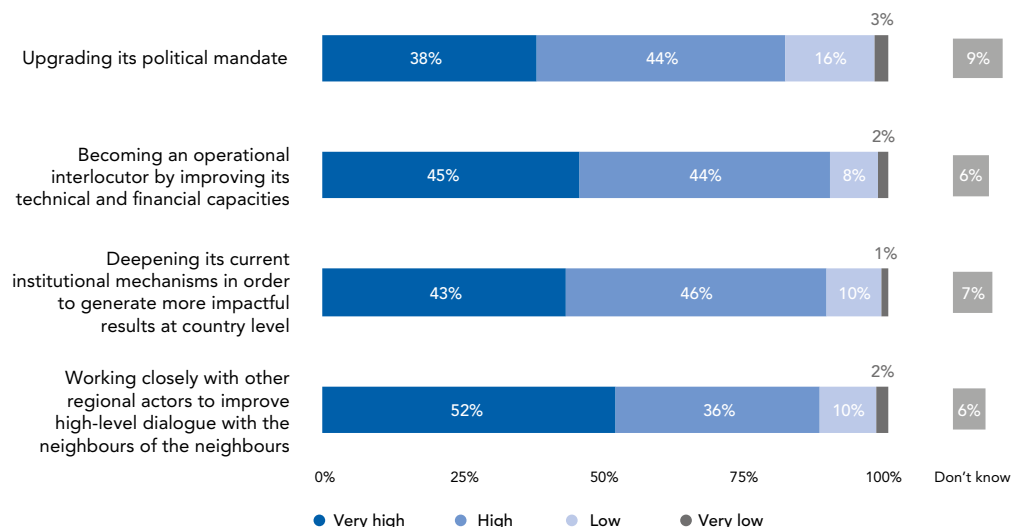
— Greek respondent

UfM effectiveness is tempered by political divisions (e.g., Israel-Palestine tensions) and reliance on EU funding, limiting its “equal level” ideal. Still, it’s a valuable framework for coordination, complementing bilateral efforts, though not a cure-all for deeper conflicts.

— Palestinian respondent

Question 16 sought to identify the priorities that should guide the UfM’s reform in order to strengthen its regional role. While the overall response was positive, the ranking of these priorities offered insight into its most pressing needs. **All respondents agreed that the top priority was “Working with other regional actors to improve high-level dialogue with the neighbours of our neighbours,” followed by measures to enhance its operational effectiveness and its institutional mechanisms.** The element least considered to help strengthening the UfM’s role was upgrading its political mandate.

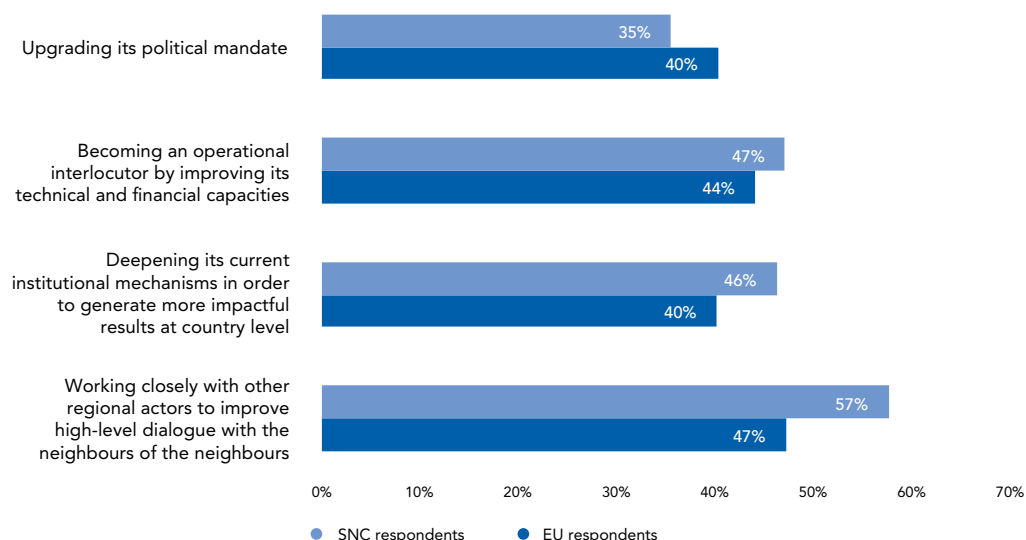
Graph 30: Q.16 In the framework of the ongoing UfM reform, to what extent should the following elements help strengthening its role?



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

A breakdown of responses by geographical origin reveals a more nuanced picture (see graph 31). While both groups share the same ranking of priorities, **SNC respondents expressed stronger support –especially for “Closer cooperation with other regional actors”, where their “very high” ratings exceed those of EU respondents by about ten points. However, the opposite trend emerged when respondents were asked about upgrading the UfM’s political mandate, where EU respondents had higher percentage of answers.**

Graph 31: Q.16 In the framework of the ongoing UfM reform, to what extent should the following elements help strengthening its role? (percentages very high answers)



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

In the open comments, respondents further detailed how the UfM could strengthen its role:

Enhancing dialogue and cooperation with these “neighbours of the neighbours” on issues of mutual concern (e.g., migration, security, climate change) is crucial for addressing complex regional challenges effectively. The UfM can play a valuable role in facilitating high-level dialogue and fostering partnerships with relevant regional organizations and actors.

— Lebanese respondent

Given the role of other regional actors, their constructive involvement and cooperation with them is important; a flexible operational platform for enhancing tech and financial capacities would be an asset.

— German respondent

Building bridges with other organizations (e.g., the African Union, Gulf Cooperation Council, etc.) expands the UfM’s reach and opens avenues for larger-scale cooperation on common issues like energy, security, or infrastructure.

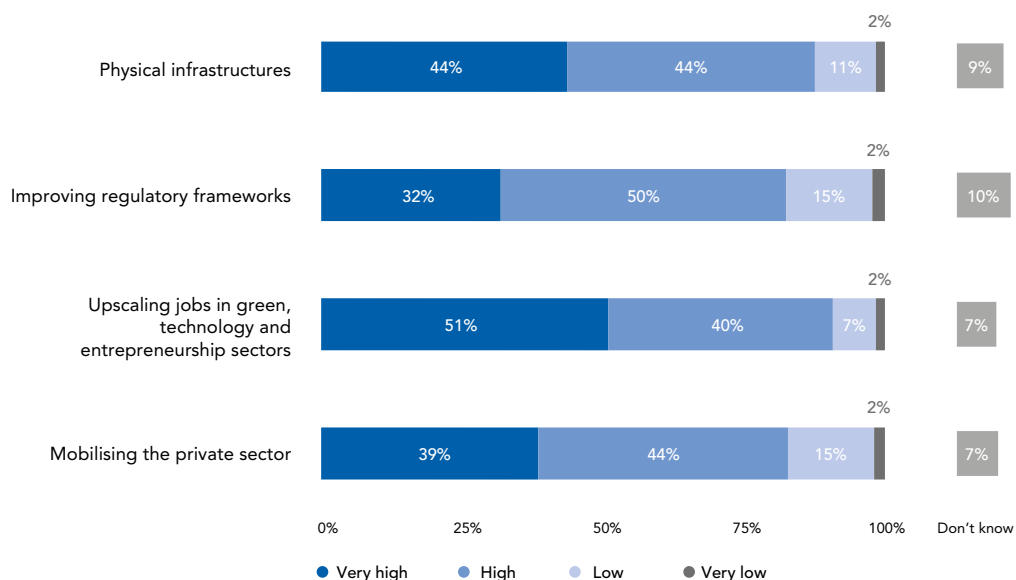
— Egyptian respondent

The challenges in the Mediterranean region extend beyond its immediate partners to actors such as the Gulf states, Sahel countries, and broader African and Middle Eastern regions. Strengthening multilateral cooperation with regional organizations such as the African Union, the League of Arab States, and the Gulf Cooperation Council (GCC) would allow the UfM to play a more strategic role in regional geopolitics.

— Italian respondent

Question 17 focused on the **potential impact of the Global Gateway strategy**, which is the EU's initiative to invest in sustainable infrastructure and strengthen global connectivity across key sectors. **According to respondents, all elements could be highly impacted.** To be mentioned that a broader impact was considered for the case of "Upscaling employment in sustainable, digital and entrepreneurship sectors" followed by "Improving physical infrastructure".

Graph 32: Q.17 What impact the Global Gateway strategy could have on the following aspects?



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

In their open comments, **the sustainability of this strategy in the long term and the relevance of the private sector were highlighted** by respondents:

The Global Gateway strategy has quite a significant impact on all the aforementioned areas (and more), yet the limiting factor is how sustainable such investments will be in terms of long-term maintenance. Many Southern Neighbourhood Countries may benefit from the initial implementation, but will likely struggle to maintain Global Gateway-related systems and infrastructure when funding is decreased or skilled human capital is withdrawn.

— Dutch respondent

The EU's investment strategy should leverage both public and private sectors. While the EU's role is to create a conducive environment, through regulations, incentives, and financial frameworks, the private sector is key to driving growth, innovation, and job creation. A balanced, collaborative approach that harnesses the strengths of both sectors will be the most effective way to boost development and foster long-term prosperity in the Southern Neighbourhood countries.

— Iranian respondent

The Global Gateway must integrate the academic and scientific dimension by supporting the digital and institutional connectivity of higher education institutions and research centres, and by relying on Euro-Mediterranean networks to anchor these investments in local dynamics. Indeed, these university networks can collaborate on these issues through projects funded by the Global Gateway, creating synergies to address these shared challenges.

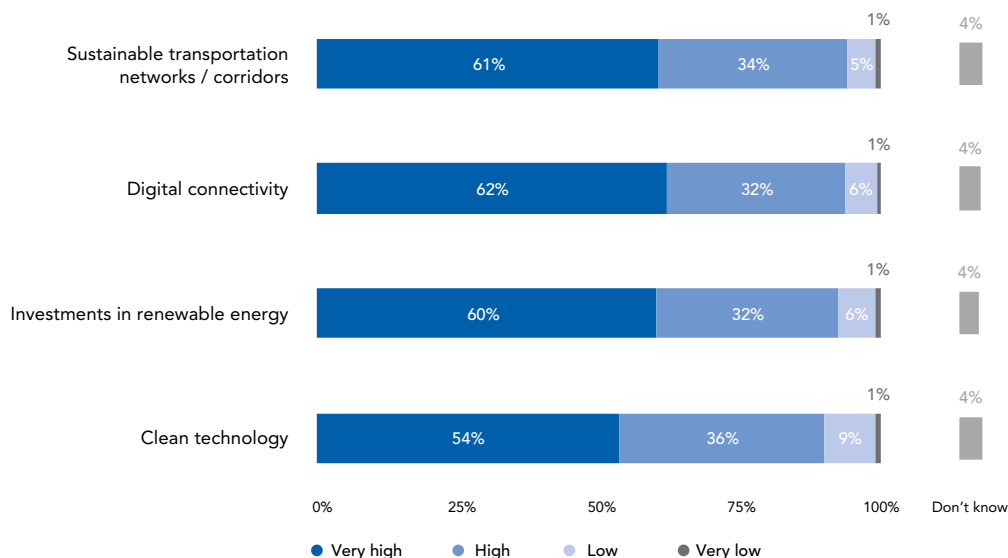
— French respondent

The Global Gateway strategy could have a significant impact by promoting sustainable infrastructure, improving regulatory frameworks for better governance, and boosting job creation in innovative sectors. However, its success will depend on the effective mobilization of the private sector and its ability to adapt to the specific needs of partner countries.

— Algerian respondent

Following up on the Global Gateway, **question 18** focused on the projects already implemented in the Southern Neighbourhood. Projects that among other, seek to build infrastructure investments that create sustainable, smart, resilient, inclusive and safe networks. There was a large majority of answers considering that **all infrastructure options were important for regional integration, with a slightly better results for "Digital connectivity" and "Sustainable transportation corridors"**.

Graph 33: Q.18 In your opinion, to what extent are these types of infrastructure important for regional integration?



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

In their open comments, respondents outlined the specific potential impacts of infrastructure projects:

Sustainable transport infrastructure and digital connectivity are essential for facilitating economic and social exchanges between countries within a region, thereby promoting regional integration. They not only reduce logistical costs but also improve market access, strengthen regional cooperation, and stimulate economic growth.

— Spanish respondent

Efficient and sustainable transportation infrastructure (roads, railways, ports, airports) is fundamental for regional integration. (...) Well-planned corridors can connect markets, reduce transportation costs, and enhance overall economic competitiveness of the region.

— Lebanese respondent

Investments in renewable energy are fundamental for regional integration, as they create interdependence, stimulate economic development, and strengthen political cooperation. However, their success depends on adequate resource mobilization, enhanced local capacities, and a shared vision of regional priorities.

— Tunisian respondent

Those infrastructure projects need to ensure compatibility with protection and restoration of ecosystems, support nature resilience, especially linked to climate adaptation and a holistic approach of the impact of the planned infrastructure investments. In that regard, strategic foresights studies may be considered to help steer the transition in the most sustainable way.

— French respondent

Infrastructure upgrading is a necessity. But the full potential of infrastructure upgrading needs a broader political project –that would facilitate cross-border travel. Smart grids are great, but if the countries near each other are not on speaking terms, the impact will be limited.

— Jordanian respondent

QUALITATIVE ANALYSIS



Interconnected futures: Towards a New Pact for the Mediterranean

Charlotta Sparre

Deputy Director of Stockholm International Peace
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While the Euro-Mediterranean Partnership has not lived up to the aspirations of the 1995 Barcelona Declaration and the past years indicate growing trust gaps between the EU and its Southern Neighbourhood, the two regions are interconnected, and cooperation is essential to address common challenges. **Despite the criticism from the Neighbourhood, the Euromed Survey indicates that the EU continues to be seen as a significant partner that brings added value.** It also underscored a wish to strengthen relations and hopes to see a more active EU.

As the 30th anniversary of the Barcelona Declaration is marked and preparations are ongoing for a 'New Pact for the Mediterranean', it will be vital –on both sides of the partnership– to **acknowledge and address the existing shortcomings of the relationship, to bridge the trust gaps and to create a more durable cooperation.** This process must build on accomplishments, address failures, and reflect on how to better prepare a common future, recognising each side's needs and interests, and building on each side's potential. This can be achieved with a joint reinvestment in dialogues.

Despite the criticism from the Neighbourhood, the EU continues to be seen as a significant partner that brings added value.

Changing times

The Barcelona Declaration and the agreement to launch the Euro-Mediterranean Partnership Process were born in an era of hope. The early 1990s saw on one side of the Mediterranean an expanding European Union, marked by post-Cold War elation, and on the other side the aspirations for peace in the Middle East, manifested through the mutually supporting bilateral and regional peace processes. Throughout the Euro-Mediterranean area, it was a time of relative stability, with few other ongoing conflicts and with a commitment to diplomacy, dialogue, and multilateral cooperation.

Over the past 30 years, we have seen ebbs and flows in the Euro-Mediterranean relations, influenced by major developments such as the second intifada (2000), the Iraq War (2003), the grand EU enlargement (2004), and the development of the Eu-

Over the past years, the relationship with Europe's Southern Neighbourhood has not only been given less attention, but it has also been coloured by defensive policies and by transactional engagement.

European Neighbourhood Policy (2004), the Arab uprisings (2011) with initial democratisation hopes, followed by return to authoritarianism and/or conflicts leading to millions of displaced people, and to a migration crisis that has come to permeate the Euro-Mediterranean dialogue.

Today, **armed conflicts are at their highest number since World War II**. State and non-state actors are resorting to force with increasing frequency, international humanitarian law is broken, and diplomacy is struggling in the face of polarisation, disinformation, and entrenched politics.

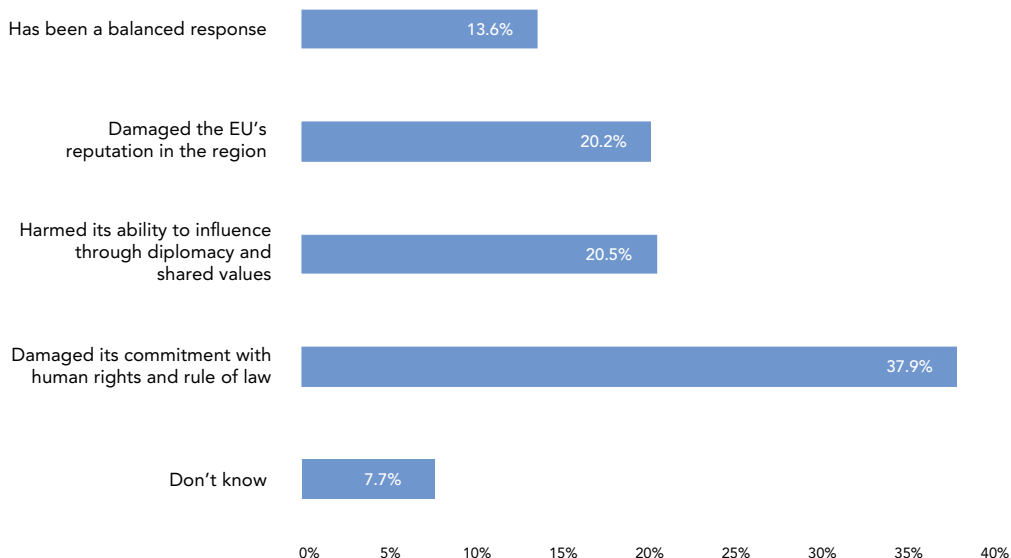
After Russia's full-scale invasion of Ukraine in 2022, the EU is severely impacted by a war on its immediate doorstep. Over the past years, the relationship with Europe's Southern Neighbourhood has not only been given less attention, but it has also been coloured by defensive policies in controlling irregular immigration and by transactional engagement with critical sectors such as energy. In addition, **the EU's response, or lack thereof, to the war in Gaza has led to claims of double standards vis-à-vis its positioning on Ukraine**. These factors have negatively affected the image and narrative of the European Union in its Southern Neighbourhood.

Growing trust gaps and credibility problems

Already at the outset, critics described the EU partnership with the Mediterranean as too Eurocentric, pointing to a Brussels-driven policy, inspired by the EU enlargement experience, with limited genuine involvement of the partner countries, and not adapted to the complex realities in the Southern Neighbourhood –a term that in itself has been seen as problematic. In addition, **the stalemate, and later collapse, of the Middle East Peace Process, made already challenging relations among Southern partners even more difficult to navigate, hampering the regional dimensions of the partnership**.

Since 2023, there are indications of a further growing trust gap, particularly related to EU's response to the conflict in Palestine. The Euromed Survey showed (see graph 1) that only 13.6 percent of all the respondents believe that the EU has had a balanced response, while 20.2 percent said that the EU's response has damaged the Union's reputation in the region, 20.5 percent said it has harmed the Union's ability to influence through diplomacy and shared values, and as high as 37.9 percent said that it has damaged the EU's commitment to human rights and rule of law.

Graph 1: Q.7 In your opinion, the impact of the EU's response to the conflict in Palestine (select only one option):



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

At the core of the Euro-Mediterranean relationship stands a commitment to human rights, as stated in Article 2 of the association agreements: "Relations between the Parties, as well as all the provisions of the Agreement itself, shall be based on respect of democratic principles and fundamental human rights as set out in the Universal Declaration on Human Rights, which guides their internal and international policy and constitutes an essential element of this Agreement."¹

Over the past decades the EU has defined a forward-looking agenda, fundamentally inspired by international law, human rights, and democratic principles. While the stress on these values has not always been appreciated by governments of partner countries, the EU maintained its credibility and a voice. However, the EU's recent response to the conflict in Palestine has been perceived as inconsistent with these principles and seems to have undermined the standing of Europe among partners.

EU's recent response to the conflict in Palestine appears inconsistent with human rights, and democratic principles and has weakened its standing among regional partners.

Changing geopolitics – A wake-up call for Europe?

It is hard to assess how the ongoing geopolitical shifts –further accentuated by major changes in American global engagement– will play out in the coming years. However, **competition for influence over the countries in Europe's Southern Neighbourhood could be expected to grow**. While the US has somewhat disengaged from

1. e.g. association agreement with Egypt https://eur-lex.europa.eu/eli/agree_internation/2004/635/oj/eng

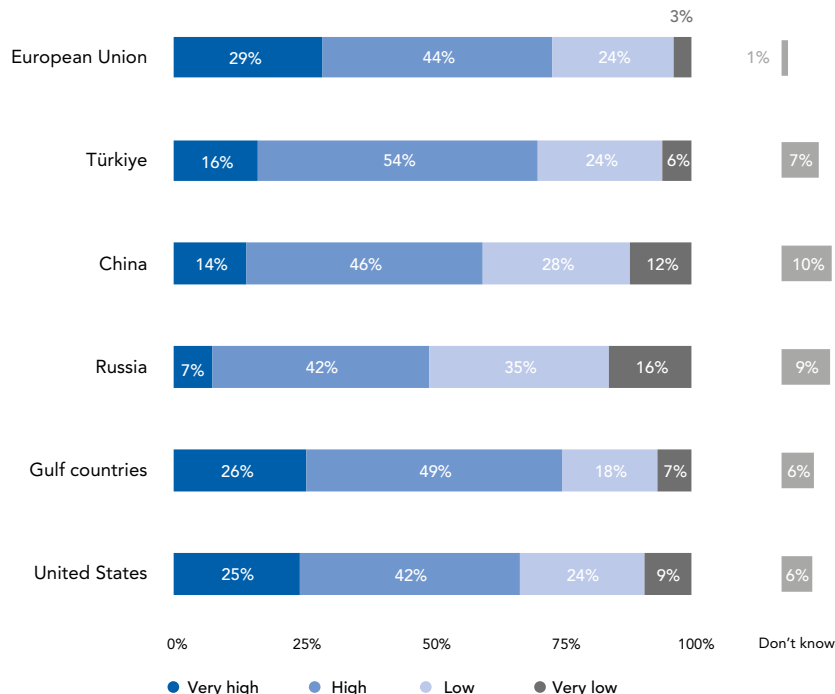
In the shifting geopolitical environment, the EU needs to ask itself how it can avoid losing influence and how it can step up its engagement and nurture a stronger partnership, with new players as well as with traditional players.

the region, China and Russia have multiplied their soft power incentives sometimes expanding into areas where they were not previously present, –for example through university cooperations and educational and cultural initiatives– to extend their economic and security outreach. In addition, **several ‘middle powers’ –particularly the Gulf countries– have become major regional players.**

In the shifting geopolitical environment, the EU needs to ask itself how it can avoid losing influence and how it can step up its engagement and nurture a stronger partnership, with new players as well as with traditional players –such as Egypt and Jordan that continue to be key partners for peace and stability in the region. **Can the current shifts be a wake-up call?**

Despite the criticism of the EU in the Southern Neighbourhood, the Euromed Survey pointed to the EU as one of the actors playing a major role in the Southern Neighbourhood (see graph 2), alongside with the Gulf region, Türkiye, the United States, China and Russia. It is noteworthy that Southern Neighbourhood respondents rated the EU as the most significant actor in the region, with 32 percent rating it as very high and 46 percent as high.

Graph 2: Q.4 In your opinion, to what extent are the following actors playing a major role in the Southern Neighbourhood?



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

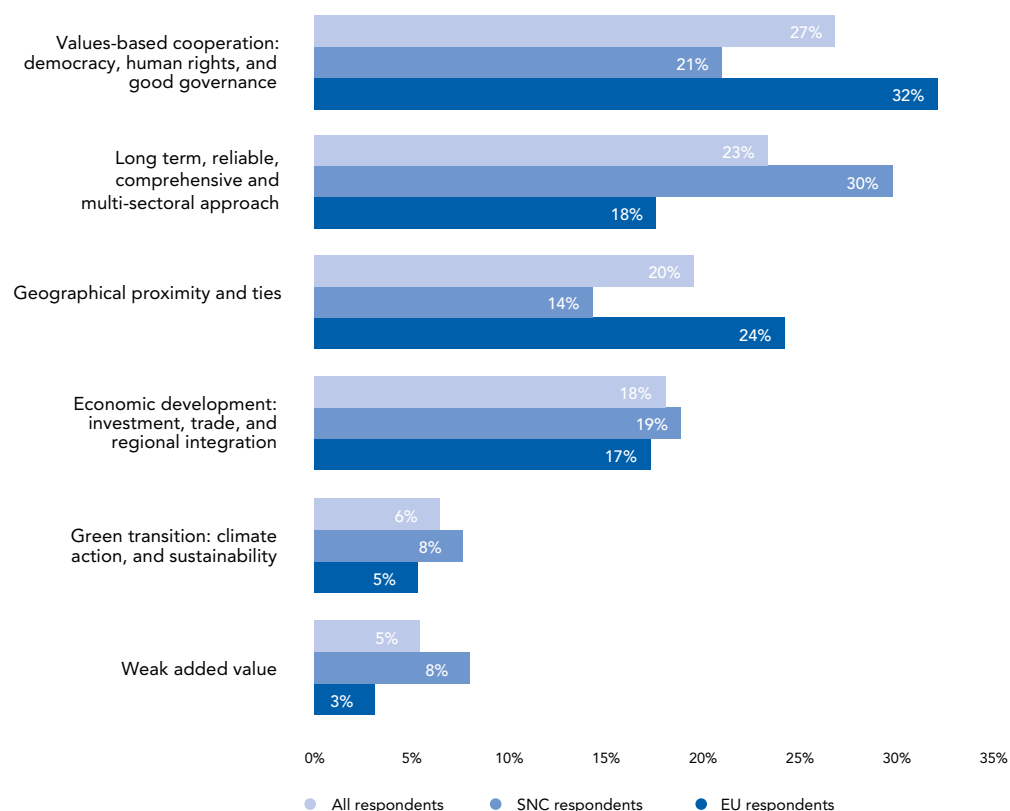
Relationships between neighbours may be complicated and at times tense, especially at a time of uncertainties and geopolitical shifts. However, whether we appreciate it or not, the EU and the Southern Neighbourhood are profoundly interconnected by history, culture, and geography. What happens in one region directly affects the other, and most of the two regions' critical challenges –from security to economy, energy, and climate– are cross-boundary by nature, and solutions need to be developed jointly. The good news is that despite the relationship's shortcomings, the Euromed Survey indicated that the Southern Neighbourhood look for more engagement and collaboration and point to comparative advantages in the relations with the EU.

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Europe's comparative advantage

In the Euromed Survey, respondents were asked what the added value of the EU cooperation is compared to other actors (see graph 3). The responses pointed to the strength of a comprehensive, holistic, and multidimensional approach, integrating security and political dialogue with economic and technical cooperation, combining bilateral and multilateral/regional cooperation. To quote one Algerian respondent: "The European Union added value in the Southern Neighbourhood primarily lies in its comprehensive and multidimensional approach to cooperation, which distinguishes it from other actors more transactional or geopolitically driven strategies."

Graph 3: Q.5 In your opinion, what is the added value of the EU cooperation compared to the other actors? (categories developed from open-ended answers)



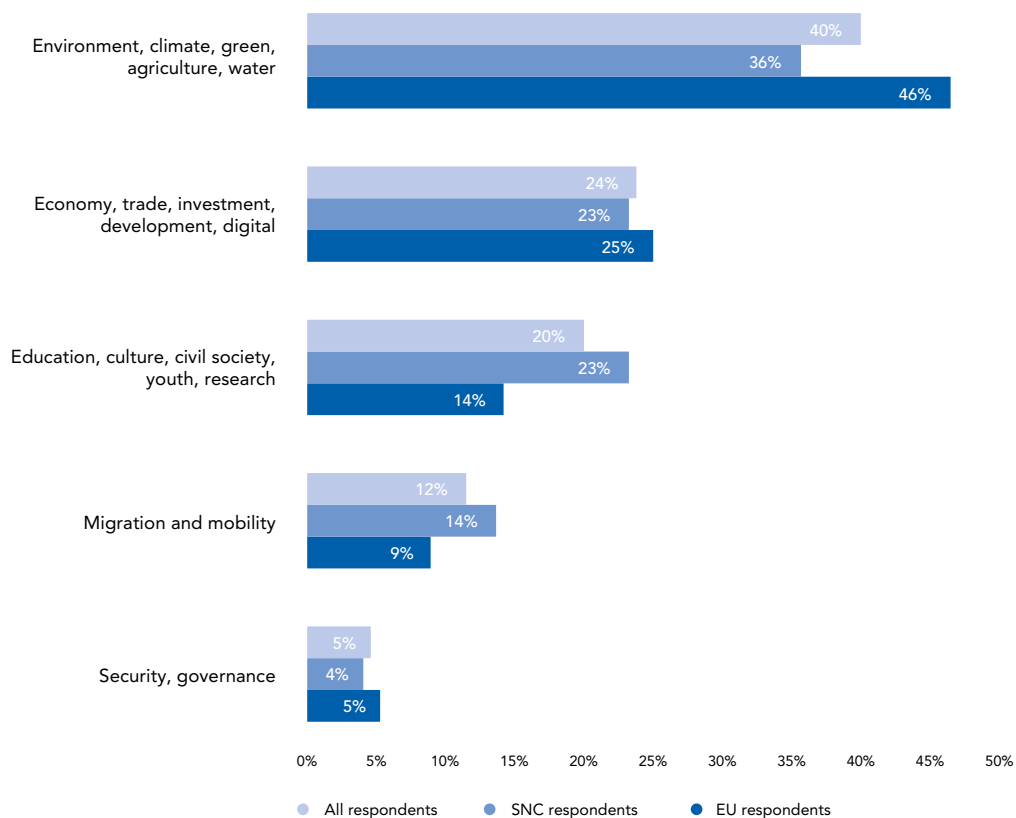
Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

In the Southern Neighbourhood, the EU remains the predominant trading partner, a significant investor and a major source of development cooperation.

For most countries in the Southern Neighbourhood, the EU remains the predominant trading partner, a significant investor and a major source of development cooperation. Considering the large immigrant communities from the region in Europe, and contacts established through study exchange programmes, trade and civil society collaborations, **there are also strong people-to-people connections.**

Asked about possible examples of an increased role for the EU in the Southern Neighbourhood since the launch of the new Agenda for the Mediterranean in 2021, **survey results indicated (see graph 4) favourable progress on environment, climate, green agriculture, economy, trade, and investment**, while only five percent pointed to positive examples on security and governance.

Graph 4: Q.2 In which specific areas can you bring forward positive examples of such increase role? (categories developed from open-ended answers)

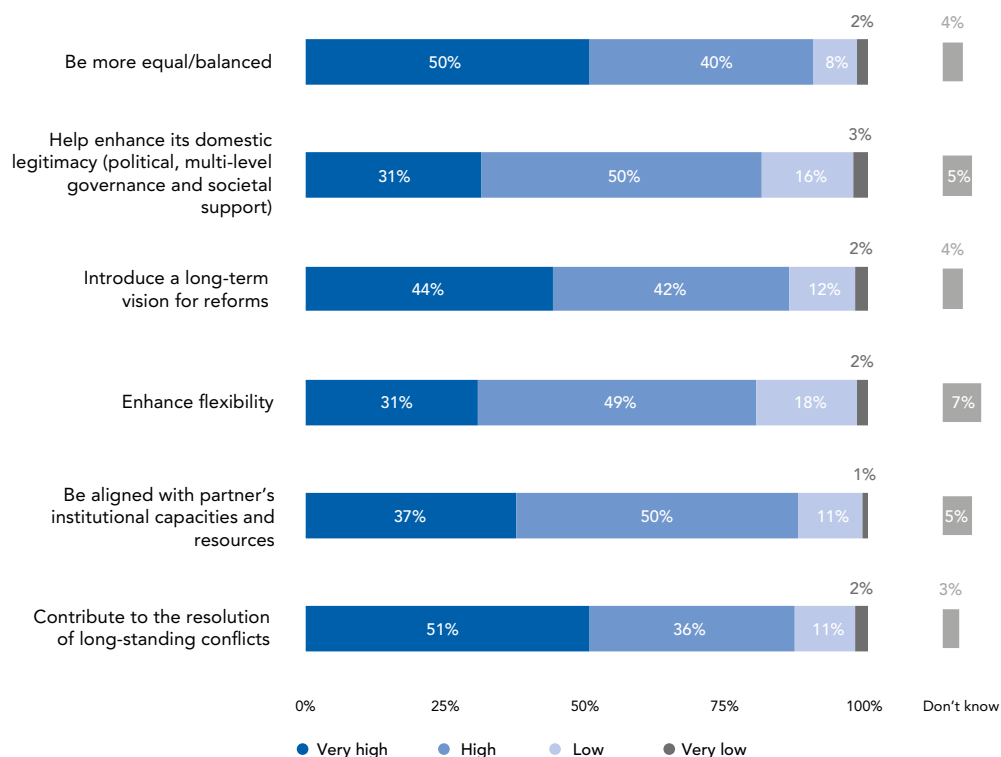


Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

On the other hand, when asked what the partnership should be, survey respondents did not only indicate a high –40 percent– or very high –50 percent– interest in a more equal and balanced partnership, but also **a partnership that should contribute to the resolution of long-standing conflicts and be aligned with partner’s institutional capacities and resources, introduce long-term vision for reforms, etc.**

In a context where many global actors operate with short-term strategic interests, the EU is perceived as offering a more stable and structured framework.

Graph 5: Q.10 To what extent should the EU's relations with Southern Neighbourhood partners...



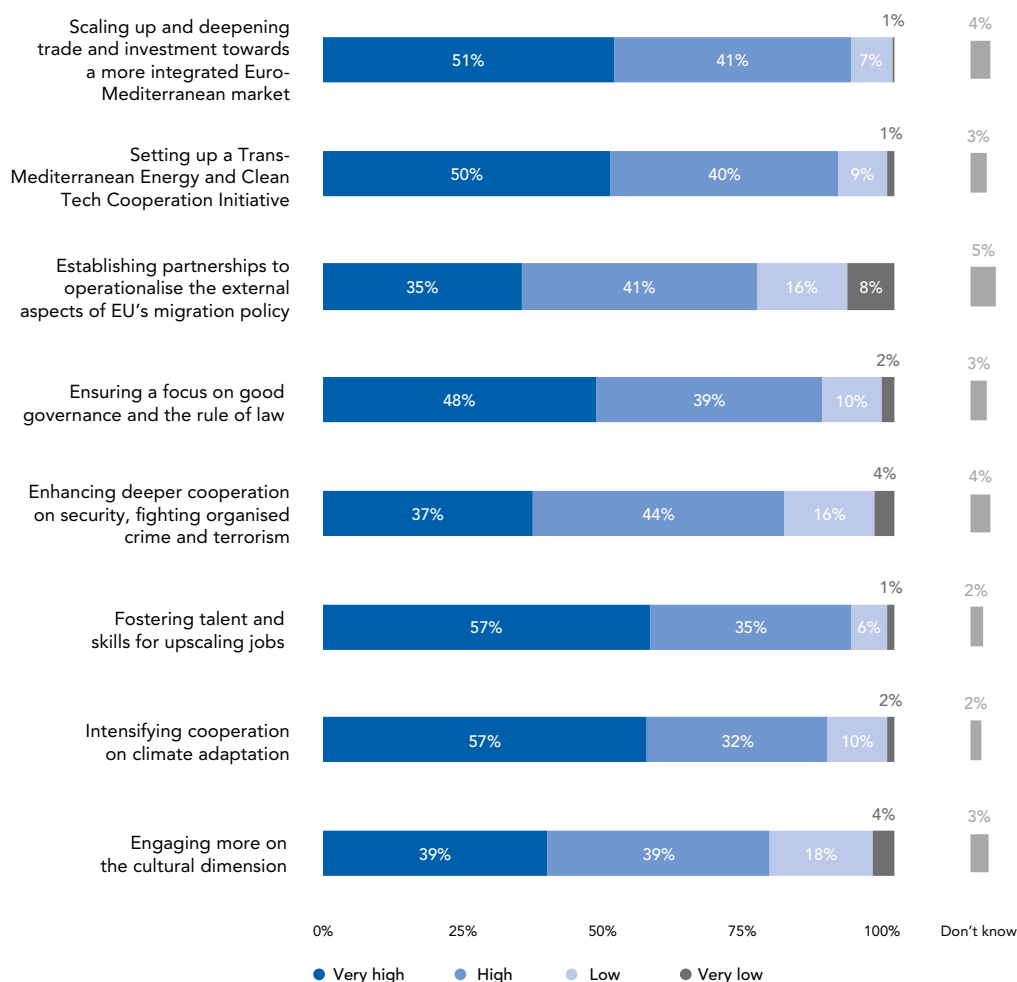
Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

Way ahead – How can we build a better Partnership?

The survey respondents gave both praise and criticism to the Euro-Mediterranean relations. **In developing the 'New Pact for the Mediterranean' we must therefore ask ourselves how we can build on accomplishments, while recognising and addressing the shortcomings.**

Asked about the importance of different elements in building a framework for the 'New Pact for the Mediterranean' (see graph 6) the survey respondents stressed, among other things, scaling-up and deepening trade; building up a trans-Mediterranean energy and clean-tech cooperation; and fostering talent and skills for upscaling jobs. Other important elements of the framework include good governance and rule of law, migration, climate adaptation, counterterrorism, and cultural engagement.

Graph 6: Q.13 To what extent do you consider the importance of the following elements in the framework of the New Pact for the Mediterranean?



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

While the survey gives many insightful reflections on Euro-Mediterranean cooperation, **several questions need to be further explored in the pursuit of the 'New Pact for the Mediterranean'**. Specifically, such questions could fall within the following elements: interests and values, partnership, security, key areas of cooperation, people-to-people contacts and soft power.

Interests and Values. Ever since the negotiations of the European Neighbourhood Policy (ENP) in 2004 there has been a perceived tension between interests and values, as if they are mutually exclusive rather than intertwined and complementary. To achieve long-term stability, the needs and interests of different parties must be

taken into consideration. **The survey results clearly indicated that values matter** –as shown in responses to (graph 1) on EU’s response to the conflict in Palestine. Looking at interests and values, questions that arise include: *How can we consider each other’s interests across the Mediterranean? How can we bridge the trust gaps as regards values –international law, human rights and democratic principles– and collaborate in strengthening good governance and rule of law?*

Partnership. From the outset the ENP was defined as a “partnership”, while it was, primarily, a policy driven by the EU. *Would it be possible to move to “real” partnership? What would that mean? For whom? How can we find common ground to address the challenges facing the two regions? What kind of dialogue mechanisms are needed and how can inclusive dialogues be developed?*

Security. Armed conflicts are at their highest number since World War II. Most countries in the Southern Neighbourhood are directly or indirectly impacted by wars and armed conflicts, as is Europe with the war in Ukraine. Furthermore, as SIPRI’s latest report on military expenditure shows, military spending had particularly rapid growth in both Europe and the Middle East in 2024. However, in addition to recognising hard security, it must be acknowledged that significant security challenges stem rather from governance deficits, economic and environmental challenges, etc. *How can we balance national security and human security? How can we balance short-term and long-term security interests? How can we build a partnership that can contribute to the resolution of long-standing conflicts?*

Key areas of cooperation. Building on the survey responses regarding building blocks for the ‘New Pact for the Mediterranean’ (see graph 5) **key areas for deepened collaboration are trade and energy.** On the economic and trade side, there is a need to drive economic and social development and address unemployment challenges, and a potential for scaling up and deepening trade and investment towards a more integrated joint market. And energy security continues to be a strategic priority for both sides of the Mediterranean. *How can partnerships be strengthened to address these security and development challenges through knowledge exchange, technology transfer, and joint business ventures? How can migration policies and multilateral cooperation be designed to contribute to such developments? How can inter-regional collaboration be developed to overcome the severe lack of regional economic integration in the Southern Neighbourhood? And how can the EU reach higher impact through better internal coordination?*

People-to-people contacts and soft power. Already the Barcelona Declaration stressed the importance of working on social and cultural issues and engagement at the people-to-people level. Over the years relationships across the regions have developed, including through migration, studies, trade and civil society collaboration. However, in recent years more restrictive European migration policies have hampered exchanges and, in the meanwhile, other actors –e.g. Gulf states, China and Russia– have stepped up their relation building. *How can the EU avoid losing influence and maintain its attractive soft power? How can people-to-people approaches be strengthened? What role can academic and professional collaborations play? How can educational and cultural exchanges, civil society collaborations, think tank fora and track II modalities contribute?*

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Reinventing EU-Mediterranean cooperation: For a more balanced and sustainable partnership

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Introduction:

The EU at a crossroads in the Southern Neighbourhood

Since 2021, the European Union has committed to strengthening ties with its Southern Neighbourhood partners through a broad range of initiatives focused on sustainable development, digital transformation, and migration management. However, perceptions of its actual role and impact remain mixed. While some observers note a renewed European presence, many highlight a stagnation or even decline in the EU's influence.

The discrepancy stems in part from the **EU's shifting priorities –notably the war in Ukraine and the increased securitisation of migration– which have overshadowed its engagement with southern partners.** In many countries, civil society actors perceive the EU as privileging security cooperation over genuine development or democratic reforms. Moreover, the **EU is seen as increasingly reactive, with its actions often interpreted as short-term crisis management rather than part of a long-term strategic vision.** Its normative rhetoric –promoting democracy, human rights, and sustainability– is frequently undermined by support for authoritarian governments when it serves European interests, especially in migration control.

This inconsistency has contributed to growing scepticism among local stakeholders. The EU's technocratic approach is also a source of frustration. Despite substantial funding, many initiatives are criticized for lacking local relevance or failing to engage

Since 2021, the EU has sought closer ties with the Southern Neighbourhood, but its growing focus on security over development has weakened its credibility and influence. This has fuelled scepticism and opened space for alternative powers like China and Russia.

grassroots actors meaningfully. Meanwhile, **the growing presence of alternative partners –such as China, Russia, and Gulf countries– has reinforced the perception that the EU’s influence in the region is diminishing or increasingly contested.**

The EU’s role since the New Agenda for the Mediterranean

While the EU promotes a multidimensional cooperation model, critics note that political dimensions –such as good governance or human rights– are often sidelined.

Some respondents acknowledge that **the EU has stepped up its efforts in specific areas. Green transition, digitalisation, economic recovery, education, and migration partnerships** are often cited. Notable examples include renewable energy initiatives in Morocco and Egypt, Erasmus+ exchanges, and the EU’s investment in post-pandemic economic resilience. These actions are generally welcomed where they empower local institutions or civil society, though their visibility and sustainability vary greatly from one country to another.

Many of these initiatives remain confined to relatively stable states –such as Jordan or Tunisia– leading to criticism of an asymmetric or selective engagement approach. Furthermore, while the EU promotes a multidimensional cooperation model, critics note that political dimensions –such as good governance or human rights– are often sidelined. **Migration partnerships, in particular, are viewed with suspicion, seen as driven more by European domestic concerns than by shared responsibility or respect for international law.**

Implementation is another issue: many programmes suffer from delays, weak monitoring, or limited local ownership. Despite the EU’s financial weight, its cooperation is often described as abstract or overly bureaucratic, reducing its perceived added value on the ground.

Expectations for stronger EU action

Many actors feel excluded from decision-making processes, leading to a sense that cooperation is imposed rather than co-constructed.

When asked where they would like the EU to do more, respondents prioritize conflict resolution (30%), economic cooperation and trade (23%), democracy and the rule of law (20%), and climate change (17%). **Youth voices especially emphasize employment, education, and climate justice.**

The lack of EU engagement in protracted conflicts –Libya, Syria, Palestine, Lebanon– is a major point of criticism. **The EU is seen as overly cautious or divided, avoiding politically sensitive issues in favour of safer, technical fields.** This undermines its credibility as a geopolitical actor and frustrates those who once saw the EU as a counterweight to authoritarianism or militarised foreign policies.

The EU is also called out for failing to engage meaningfully with local civil society. Many actors feel excluded from decision-making processes, leading to a sense that cooperation is imposed rather than co-constructed. Without political will, sufficient resources, and inclusive mechanisms, the EU risks losing trust among its most natural allies in the region.

Competition and influence: The regional power dynamics

Respondents from the EU identify the Gulf countries and Türkiye as the most influential actors, whereas those from the Southern Neighbourhood rank the EU as the primary actor, followed by the United States and the Gulf countries. China and Russia are gaining visibility but are still behind the rest of actors.

However, respondents describe the EU as fragmented, slow-moving, and increasingly irrelevant in key regional developments. Even its **economic leverage is being matched or outpaced by competitors offering faster, less conditional partnerships**. In contrast to the EU's values-based model, these emerging powers often operate with a clear focus on interests and influence. While this raises questions about long-term sustainability, it appeals to governments in the region seeking quick wins and less interference in domestic affairs.

In contrast to the EU's values-based model, the emerging powers in the region often operate with a clear focus on interests and influence.

The EU's comparative advantages and persistent challenges

Despite growing competition, many respondents still recognize the EU's unique strengths. Its model of cooperation –linking economic development with democratic governance, social inclusion, and sustainability– remains attractive to many civil society actors and young professionals. European funding mechanisms, research partnerships, and cultural exchanges (such as Erasmus+) are praised for creating opportunities and fostering long-term connections. In areas like environmental protection, digital innovation, and education, the EU is seen as offering real added value.

However, these advantages are increasingly overshadowed by weaknesses: a lack of coherence, a perceived democratic deficit in its external actions, and an inability to enforce its own values when they conflict with political or security interests. The contradiction between promoting human rights and partnering with repressive regimes is particularly damaging. To remain credible, the EU must demonstrate that its principles are not negotiable. This requires a more unified foreign policy, deeper engagement with local communities, and mechanisms that ensure transparency and accountability.

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Potential for partnership: Stability and sustainable development

According to respondents, the EU–Southern Neighbourhood partnership holds the greatest potential for promoting geopolitical stability (26.7%) and achieving the Sustainable Development Goals (25.9%). Many argue that the two are interdependent: without peace and governance, sustainable development is impossible.

Yet, there's also a desire to move away from a donor-recipient model toward a relationship based on mutual respect and shared interests. For this to happen, **the Mediterranean must be viewed not as a dividing line, but as a space of co-crea-**

Despite decades of dialogue, cultural and political misunderstandings remain a significant barrier. Addressing this will be essential to rebuilding trust and shaping a more equal partnership.

tion and collaboration. That requires listening more carefully to local priorities and building horizontal partnerships.

Still, major obstacles persist: **political repression, regional fragmentation, and foreign interference all hinder cooperation.** Some respondents also warn against placing unrealistic expectations on the EU, noting its limited competences in foreign affairs and the difficulty of forging a coherent voice among 27 member states. Interestingly, “Mutual understanding” scored low (just 10%), suggesting that despite decades of dialogue, cultural and political misunderstandings remain a significant barrier. Addressing this will be essential to rebuilding trust and shaping a more equal partnership.

The EU’s response to regional conflicts: Case study of Gaza

The EU’s response to the war in Gaza is widely seen as a turning point. Only 13.6% of respondents consider the EU’s position to be balanced. Over 40% say it has damaged the EU’s credibility, and nearly 38% believe it contradicts the EU’s core values. The Union is criticized for being passive, inconsistent, and politically divided—especially in contrast to its unified and value-driven stance on Ukraine. This perceived double standard has deeply hurt the EU’s image as a defender of international law and human rights.

In many Southern Neighbourhood countries, this has reinforced a sense of injustice and moral failure on the EU’s part. **The silence or ambiguity of EU institutions during key moments of the conflict has been interpreted as complicity or, at best, indifference.** Some respondents recognize that EU foreign policy is constrained by internal divisions and procedural rules, but this does little to mitigate the damage to its reputation. If the EU wants to remain a credible actor in the region, it must show that its commitment to human rights applies equally and consistently across all conflicts.

Priorities for the post-war Palestinian context

The survey reveals strategic ambiguity: aspirations for justice and recognition coexist with pragmatic calls for institutional reform and reconstruction.

Survey results reveal a clear consensus: the EU must play a meaningful role in “The Day-After” in Palestine. While many support maintaining the EU’s role as the leading donor, 67% of respondents emphasize the need to rebuild Gaza’s human infrastructure as a top priority. This is followed by the recognition of a Palestinian state and the imposition of sanctions on West Bank settlers. These **preferences reflect a shift beyond humanitarian relief towards long-term justice, sovereignty, and development.** In light of the war in Gaza since October 2023, there is growing frustration with diplomatic inaction and what many see as selective application of international law. Respondents urge the EU to move from being a passive funder to becoming a credible political force—capable of pressuring Israel while supporting Palestinian reforms.

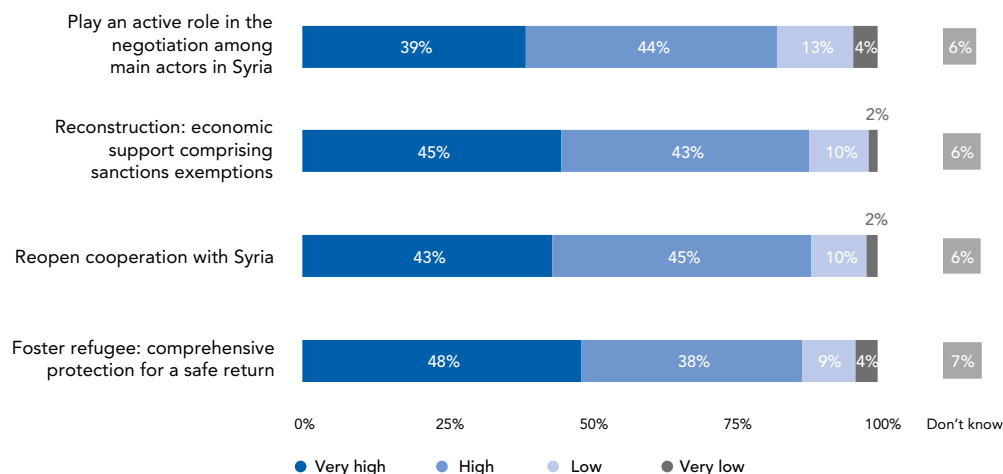
There is strong support for an approach rooted in international law, equality, and civil society engagement. People are no longer satisfied with compassion alone –they demand consistency, accountability, and justice. Still, the survey reveals strategic ambiguity: aspirations for justice and recognition coexist with pragmatic calls for institutional reform and reconstruction.

While the EU is seen as economically powerful, its political credibility is questioned. This tension undermines the impact of proposed actions. Some participants also use the survey to express activist anger, which occasionally overshadows constructive vision. Moreover, while the numbers reflect consensus on certain issues, they fail to capture the geopolitical diversity among respondents. **As polarization around Gaza intensifies, moral positions risk overpowering strategic thinking.** Unless the EU reconciles these conflicting expectations, its normative influence in the Mediterranean –and globally– will continue to erode.

Strategic approach needed for Syria's transition

Survey responses on Syria call for a more strategic and humane EU approach. Key priorities include economic reconstruction (45% strongly support), active diplomatic involvement (48%), and ensuring safe refugee returns (39%). **The responses favour a comprehensive strategy combining diplomacy, humanitarian aid, and civil society support.** Written feedback also highlights transitional justice, accountability, and conditioning aid on democratic criteria.

Graph 1: Q.9 In your opinion: to what extent should the EU prioritise the following elements to be effective and helpful in the new Syrian scenario/Syrian transition?



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

Europe views Syria mainly through the lenses of security and migration, while local actors demand justice, memory, and social rebuilding. This moral misalignment could undermine the EU's long-term credibility in Syria –and beyond.

Given the deadlock following the Astana process and the Syrian regime's efforts to regain international legitimacy, respondents want the EU to act not just as a funder but as a credible mediator upholding democratic standards. There's clear resistance to "normalisation without reform." **The ongoing refugee crisis and tensions involving regional powers (Iran, Turkey, Russia) add urgency to this call for a coherent EU strategy** –one that balances political realism with moral principles.

However, the consultation exposes key challenges. **Respondents call for both stronger pressure on the regime and renewed engagement, without resolving this contradiction.** While transitional justice is widely supported, few offer practical or realistic mechanisms. Additionally, the confusion between the EU and its member states suggests a lack of clarity about the Union's real diplomatic capabilities. **This gap between expectations and actual capacity could lead to disillusionment if the EU fails to translate intent into coordinated action.**

A serious rethink is needed –not just about policy goals, but about strengthening the EU's own foreign policy tools. Personally, I see a growing disconnect: Europe views Syria mainly through the lenses of security and migration, while local actors demand justice, memory, and social rebuilding. **This moral misalignment could undermine the EU's long-term credibility in Syria –and beyond.**

Rethinking EU-Mediterranean Cooperation: Challenges and opportunities

Many respondents highlight structural imbalances in the EU's partnerships, noting that reforms are imposed without reciprocity on key issues like mobility or trade. Civil society is often sidelined, and forums like the Euromed Civil Forum are seen as largely symbolic.

The EU's relationship with Southern Mediterranean partners is marked by contradictions. While it promotes stability and neutrality, its policies often reflect strategic inconsistency. Its reluctance to sanction Israel while funding development projects in Palestine is seen as a glaring double standard. Similarly, its unclear stance on Western Sahara and its willingness to cooperate with authoritarian regimes for migration control damage its credibility.

Moreover, the **EU's technocratic approach** –focused on targeted projects rather than addressing root causes like occupation or inequality– **limits its conflict-resolution potential.** There's a clear need for alignment between values and actions. Until the EU moves away from supporting repressive regimes and adopts a balanced diplomacy, its impact will remain peripheral.

On the question of partnership, many respondents emphasize structural imbalances. The EU imposes reforms without reciprocating on key issues like freedom of movement or agricultural subsidies. Civil society actors are sidelined, and platforms like the Euromed Civil Forum are often symbolic. **The "regionalism" promoted by the EU faces fragmentation due to a lack of binding mechanisms and political will.**

Economic and trade relations: Addressing inequalities

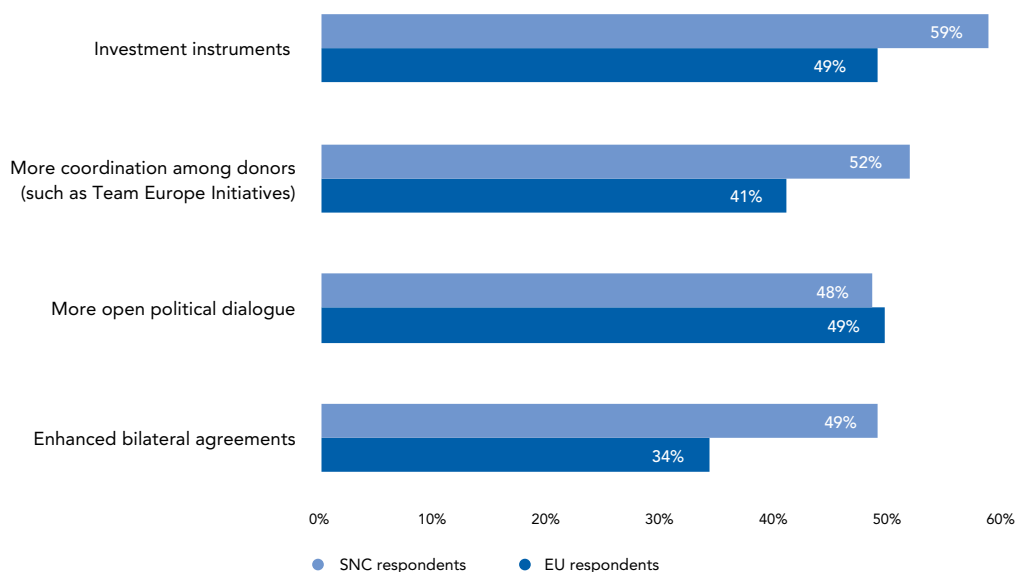
While investment tools are appreciated, they often serve European interests. Funding priorities –like infrastructure or energy– rarely reflect local needs. Democratic conditions applied unevenly also fuel mistrust. **Trade agreements often disadvantage Southern economies**, and investment conditionality fosters technological dependence. Illicit financial flows, which drain local economies, remain largely unaddressed.

Programs promoting “talent” and green skills face harsh local realities. In Tunisia, youth unemployment drives emigration despite training initiatives. Green energy cooperation is marred by double standards: the EU subsidizes fossil fuels at home while extracting solar potential from Africa. Such practices risk perpetuating colonial dynamics under an ecological guise.

Economic and trade development is viewed as a priority, but trade deals like ALECA worsen imbalances, harming local industries. Infrastructure funding often benefits European firms, not local development. The failure to address capital flight reveals a lack of political will to tackle deep-rooted economic inequalities.

While investment tools are appreciated, they often serve European interests. Funding priorities –like infrastructure or energy– rarely reflect local needs.

Graph 2: Q.12 To what extent are the following elements/tools important to structure these partnerships? (percentages very high answers)



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

To build a credible and sustainable partnership, the EU should simplify its procedures, align with local priorities, address power imbalances, and ensure true reciprocity by actively including local voices.

The role and reform of regional institutions

The Union for the Mediterranean (UfM) receives lukewarm support, seen as symbolizing Europe's Mediterranean contradictions. Its limited budget, institutional paralysis, and lack of real collaboration make it ineffective. Without democratic reform and shared decision-making, it risks becoming irrelevant. Reform proposals for the UfM –like expanding to the Sahel or boosting high-level dialogue– ignore complex regional tensions and power imbalances. The lack of strategic alignment and institutional equity continues to hinder meaningful cooperation.

Lastly, the Global Gateway initiative, meant to rival China's Belt and Road, fails to convince. Most of its funding is recycled, access is slow, and conditionalities are unpopular. Its scattered, technocratic projects lack a cohesive vision. **Unless the EU simplifies its procedures and aligns its strategy with local priorities, it will struggle to offer a credible alternative.** In short, without addressing power asymmetries, committing to true reciprocity, and incorporating local voices, EU-Mediterranean cooperation will remain unbalanced –and unsustainable.

Conclusion:

Towards a balanced and sustainable partnership

The EU's renewed agenda for the Mediterranean has led to some tangible progress, especially in green development, education, and economic recovery. However, deep **concerns persist about its fragmented approach, lack of political courage, and tendency to prioritize its own security over mutual interests.** To rebuild trust and strengthen its role in the Southern Neighbourhood, the EU must do more than fund projects. It must listen, engage, and commit to a partnership based on equality, values, and mutual accountability.

Triangular Partnership on the rise: How the European Union, the Southern Neighbourhood and the Gulf Cooperation Council can shape the future together

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This analysis explores the growing potential of a triangular partnership among the European Union (EU), the Southern Neighbourhood partner countries (SNPC) of the Middle East and North Africa (MENA) region, and the Gulf Cooperation Council (GCC). In an increasingly multipolar Mediterranean landscape, these three regional blocs share significant common interests in stability, sustainable development, and effective governance. Yet, to date they have largely pursued these goals in parallel rather than in concert. Drawing on findings from the EuroMeSCo Euromed survey 2025, **this study identifies four key areas –clean energy production, marine protection, secure trade and economic connectivity, as well as conflict resolution– where coordinated investment, equitable collaboration, and a flexible political architecture could deliver enduring benefits for all stakeholders.**

A missed opportunity and a new external cooperation partner on the horizon

In the 1990s, the EU missed a crucial opportunity with its EuroMed cooperation framework to establish a robust and resilient Euro-Mediterranean Partnership that could have countered the influence of other external actors in the Mediterranean region. As a result, from the 2000s onwards, the USA, Russia, Türkiye and especially China, increased their stakes in the Southern Mediterranean region.

The relationship between the EU and its Southern Neighbours has since evolved within an increasingly multipolar world with transactional policies pursued by governments and leaders. From the mid-2010s onwards, the EU gradually lost influence, became reactive and concentrated on curbing migration.

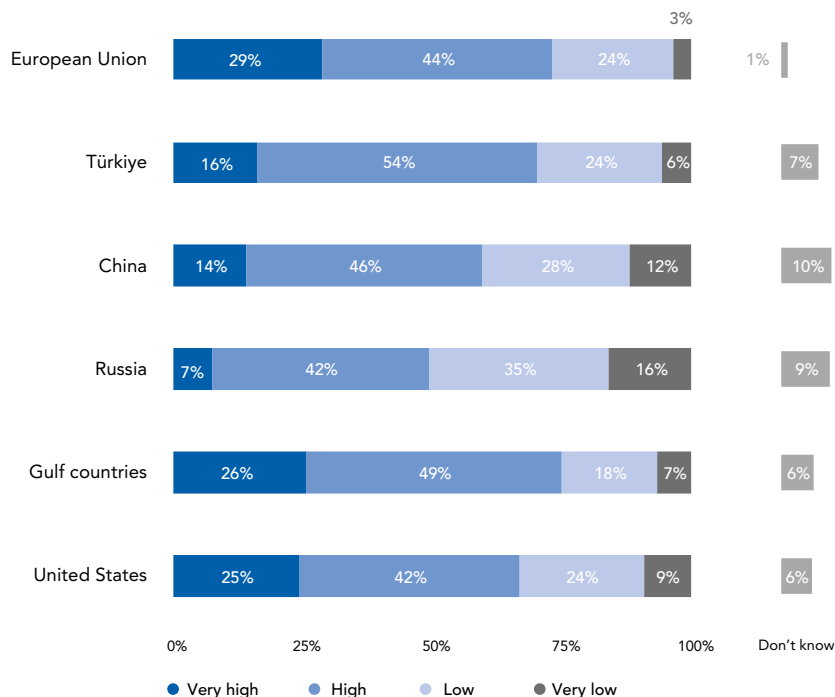
Yet since November 2024 and the inauguration of the new EU Commission, a new chapter has been unfolding. The EU is now pursuing a more comprehensive eye-to-eye partnership with the European Neighbourhood-South. This effort, however, comes amid significant challenges: ten ongoing conflicts and wars (including those in and around Iran, Iraq, Israel-Palestine, the Kurdish regions, Lebanon, Libya, Sudan, Syria, Yemen and Western Sahara) along with a host of economic and social pressures.

Today, the EU faces more challenges and competitors than it did in the 1990s, once considered the century of opportunities. Yet, by seeking new partners in the wider neighbourhood, the EU can still enhance its role. **One such key partner with great potential for the EU and the Southern Neighbourhood is on the horizon: The Arab Gulf countries.**

The impact and influence of the Arab Gulf states in the Southern Neighbourhood should not be underestimated, as they play a pivotal role in the region through growing investments, diplomatic initiatives, and financial assistance. **This growing role is substantiated by the findings of the EuroMeSCo Euromed survey 2025. According to the results, 75 per cent of respondents rated the Gulf countries' role in the region as "very high" or "high," making them the most influential external actor.** The EU closely followed at 73 per cent and Türkiye at 70 per cent. Although the differences among these three actors are relatively small, the Gulf states' leading position is nonetheless evident (see graph 1).

Today, the EU faces more challenges and competitors than it did in the 1990s, and a partner with great potential for the EU and the Southern Neighbourhood is on the horizon: the Arab Gulf countries.

Graph 1: Q.4 In your opinion, to what extent are the following actors playing a major role in the Southern Neighbourhood?



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

The potential of the Gulf Cooperation Council and its member states

The Arab Gulf states are united under the Gulf Cooperation Council (GCC). This is a regional intergovernmental organisation comprising six countries: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates (UAE). Headquartered in Riyadh, the GCC was established in 1981 against the backdrop of the Iran/Iraq war –to enhance economic, political, and security cooperation among its member states.

As a regional organisation endowed with substantial sovereign wealth and significant regional influence, the GCC, is an attractive partner for cooperation. However, one should be aware that the political and societal systems of GCC member states do not automatically align with EU standards on democracy and human rights (compare Bertelsmann Transformation Index: Bertelsmann Stiftung, 2024). Encompassing a territory of over one million square miles, the GCC member states collectively host around 60 million people and generate a combined Gross domestic product (GDP) of over USD 3,655 trillion. A comparative glance at Türkiye –an EU accession country with long-standing institutional ties to the EU– illustrates the GCC’s significance:

Despite being composed largely of small to medium-sized nations, the GCC wields considerable economic power and substantial international political influence.

the GCC's total landmass is more than three times larger than Türkiye's, though Türkiye's population exceeds that of the GCC by roughly 27 million. Still, the GCC's collective GDP is more than three times greater than Türkiye's nominal GDP. These figures underscore that, despite being composed largely of small to medium-sized nations, the GCC wields considerable economic power –and, based on its oil and gas resources and exports, substantial international political influence. In 2023, the GCC accounted for 28.2 per cent of global crude-oil exports (Gulf Today, 2025), and the Red Sea, which borders several Gulf partners, facilitated 12-15 per cent of worldwide seaborne trade. In 2022 alone, GCC countries invested USD 178 billion in the EU (Al-Saif, 2025) through direct investment, accounting for 38 per cent of all non-EU foreign direct investment (FDI) inflows into the bloc.

Each GCC member state has articulated its long-term ambitions through national "Vision" strategies. For example, the UAE's "We the UAE 2031" strategy (Government of UAE, 2025) aims to double the country's GDP from United Arab Emirates dirham (AED) 1.49 trillion to AED 3 trillion and to generate AED 800 billion in non-oil exports. Similarly, Saudi Arabia has committed itself, through its Vision 2030 plan (Government Saudi Arabia, 2025), to diversify away from oil by expanding non-oil sectors and to strengthen its leadership role in the Arab and Islamic worlds.

Each GCC member state has articulated its long-term ambitions to diversify away from oil, and achieving these goals requires a stable security environment to foster the growth of domestic industries.

Achieving these goals requires a stable security environment to foster the growth of domestic industries. Yet the regional landscape remains fragile, with conflicts in/ around Yemen, Iran, Iraq, Syria, Lebanon, Israel-Palestine and Sudan posing risks to potential investments. **Recognising that security and economic development are interlinked, GCC members have stepped up their engagement in regional conflict resolution efforts.** In the Gulf region itself, they try to de-escalate the regional conflict with Iran, including efforts to address tensions surrounding its nuclear program. Qatar, the UAE and Saudi Arabia are part of Arab initiatives seeking to end the war in Gaza and to start political and economic reconstruction. Furthermore, at UN level, Saudi Arabia is co-leading with France the Global Alliance to promote the two-state solution Israel-Palestine. Moreover, Saudi Arabia, Qatar and the UAE try to engage with the new leaderships in Lebanon and Syria in order to end fragility and friction in these two states of the EU Southern Neighbourhood. Beyond the region, GCC states, most visibly Saudi Arabia, engage in bridging gaps between Ukraine and Russia, where they have facilitated hostage exchanges and backchannel negotiations.

The Gulf region faces significant challenges that threaten their ambitious modernisation programmes: Rising temperatures and water scarcity –exacerbated by climate change– pose serious risks. In response, the Gulf states are increasingly prioritising economic diversification. Strategies are underway to transform parts of their economies into service and alternative energy production hubs, also pressured by demographic shifts and the negative impact of climate change.

EU-GCC-Partnership in detail

The EU's institutional framework for partnership with the GCC is set out in the 2022 Joint Communication on a "Strategic Partnership with the Gulf" (European Commis-

sion, 2025). It identifies six core areas of cooperation: prosperity; green transition and sustainable energy security; regional stability and global security; humanitarian and development assistance; people-to-people ties; and enhanced institutional collaboration. These priority areas align with many of the political and economic challenges in the EU's Southern Neighbourhood. In particular, the Communication highlights the importance of joint engagement in promoting "peace and stability in this wider region," explicitly naming Iraq, Yemen, Syria, Libya, Lebanon, Israel/Palestine, Somalia, Ethiopia, and Sudan as focal points for cooperation.

GCC member states are already investing in the EU's Southern Neighbourhood. For example, the UAE is co-financing the development of gas fields in Israel; Qatar intends to invest in gas-interconnectivity through Syria; and the UAE and Saudi Arabia are backing the India–Middle East–Europe Economic Corridor (IMEEC) –a major infrastructure and connectivity initiative that aims to link South Asia with Europe via the Middle East and the Mediterranean. Startup collaboration initiatives have also been launched between Qatar and the UAE with Lebanon, Tunisia, and Morocco.

While the EU is currently formulating a New Pact for the Mediterranean, **the GCC is simultaneously deepening its political and economic engagement in several countries of the EU's Southern Neighbourhood. Ultimately, the strengths of both regional organisations –the EU and the GCC– could be more effectively combined within a triangular partnership framework.**

The EU's institutional framework for partnership with the GCC highlights the importance of joint engagement in promoting "peace and stability in this wider region".

Thematic areas for a triangular partnership

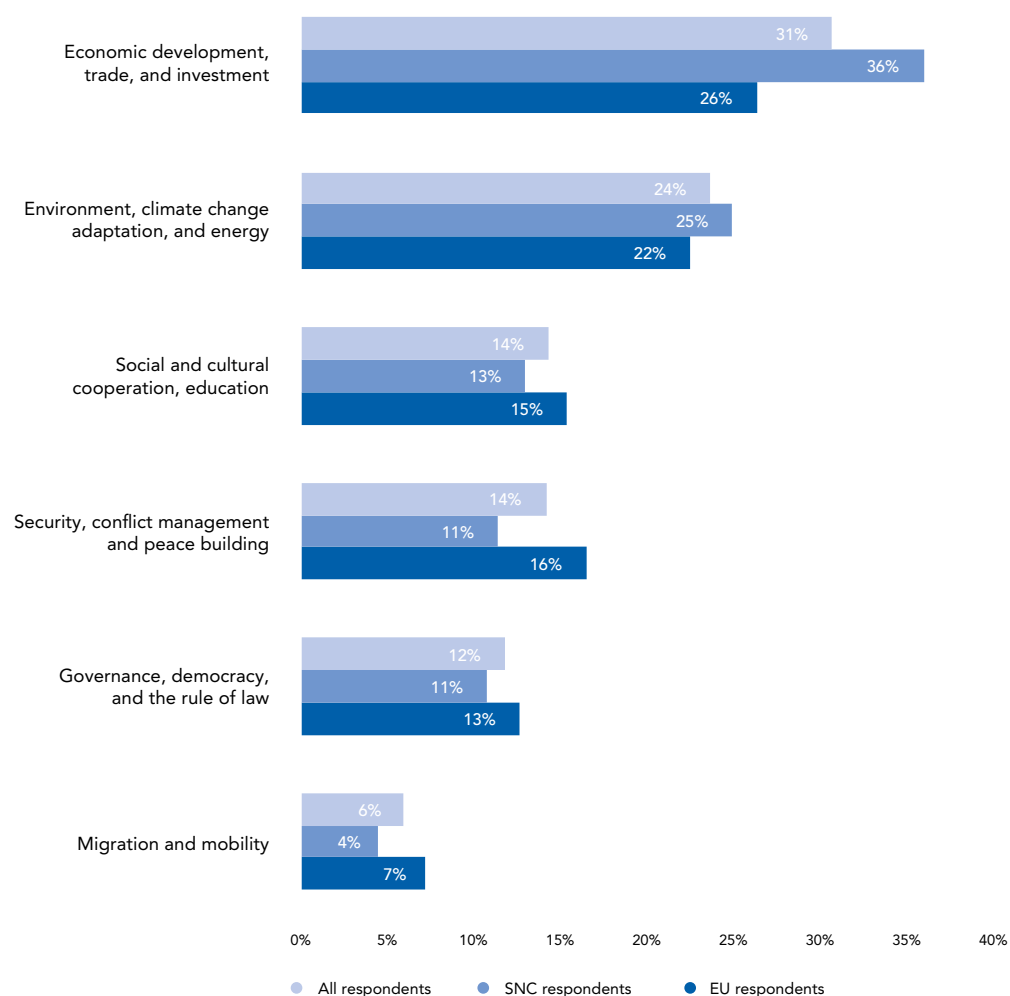
The question therefore arises: **How can a triangular partnership work? Based on the EuroMeSCo Euromed survey 2025, four areas offer entry points for triangular cooperation:**

1. **Alternative energy production for a post-fossil society:** Developing and deploying wind, solar, hydro, biomass, and geothermal technologies to diversify energy supplies and accelerate decarbonisation. Further details are available in this study (Bertelsmann Stiftung, 2024).
2. **Marine environmental protection:** Cleaning and preserving shared marine spaces (the Mediterranean, the Red Sea, and the Gulf). Together with alternative energy, this aligns with respondents' prioritisation of environmental protection, climate-change adaptation, and energy (see Q.14 in graph 2).
3. **Secure trade routes and enhanced connectivity:** Jointly safeguarding maritime and overland corridors and expanding transport and digital interconnections, reflecting the importance of economic development, trade, and investment –as also highlighted by respondents in the survey (see the first thematic focus in graph 2).

Focusing on these four pillars –clean energy, marine conservation, resilient connectivity, and peacebuilding– triangular cooperation can begin to generate concrete advantages for all stakeholders across the three regions.

4. **Political and diplomatic conflict resolution:** Coordinating efforts to address the ten ongoing wars and conflicts across the MENA region (including Iran, Iraq, Israel-Palestine, the Kurdish question, Lebanon, Libya, Sudan, Syria, Yemen and Western Sahara). This resonates strongly with survey respondents: 87 per cent expect the partnership to help resolve “long-standing conflicts” (see graph 3).

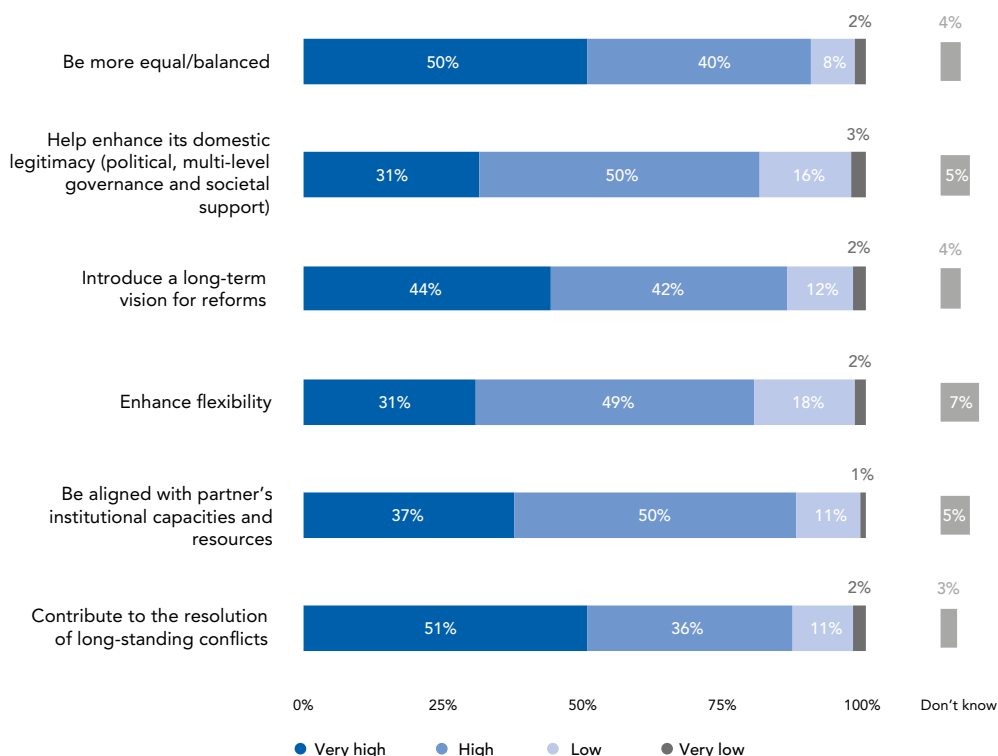
Graph 2: Q.14 Which areas should those partnerships prioritise?
(categories developed from open-ended answers)



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

By concentrating on these four areas –clean energy, marine protection, secure connectivity, and peacebuilding– triangular cooperation can start to deliver tangible benefits for all partners of the three regional groupings.

Graph 3: Q.10 To what extent should the EU's relations with Southern Neighbourhood partners...



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

Together, the three regional groupings can pool resources into thematic investment funds: the EU through its Global Gateway initiative (European Commission, 2025) and the GCC via its sovereign wealth funds. Joint innovation centres could then be established to advance shared economic and environmental projects.

However, a triangular partnership will only succeed if project collaboration is truly equal. This view is reflected in the survey, where 90 per cent of respondents called for “more equal/balanced” relationships (see graph 3). In particular, the Mediterranean countries must not be left behind by the two financially stronger blocs. Ultimately, each partner should feel like an active contributor, not a passive observer, in the partnership.

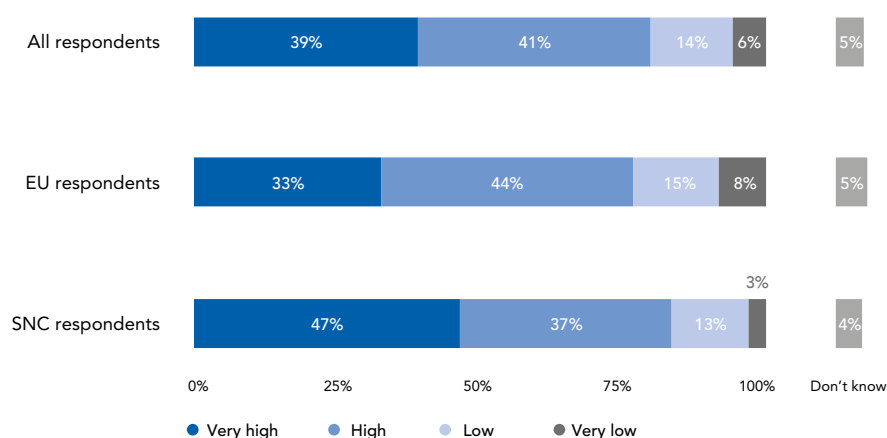
Triangular projects could be integrated into the UfM's core framework, while also allowing for flexible arrangements to involve the Arab Gulf States of the GCC.

What kind of political framework could support such a Partnership?

The Union for the Mediterranean (UfM) can serve as a framework for embedding the proposed triangular partnership. **Triangular projects could be integrated into the UfM's core Mediterranean framework, while also allowing for flexible arrangements to involve the Arab Gulf States of the GCC.** Survey results show strong support for this approach: 80 per cent of respondents rated the UfM's potential "very high" or "high," agreeing that it "can offer a unique platform where mutual interests are pursued at equal level, and to seek new avenues to promote regional cooperation mechanisms" (see graph 4).

Graph 4: The Union for the Mediterranean (UfM) can offer a unique platform where mutual interests are pursued at equal level, and to seek new avenues to promote regional cooperation mechanisms.

Q.15 To what extent do you agree with this proposal?



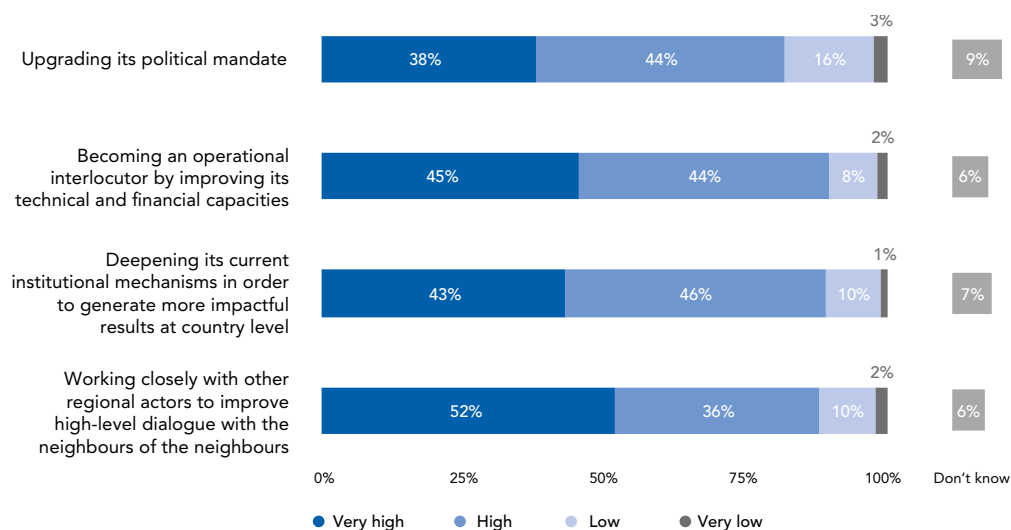
Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

A current example of triangular cooperation within the UfM framework is the 5th UfM Energy and Climate Business Forum (UfM, 2025). It brings stakeholders from the Euro-Mediterranean and Gulf regions together to address challenges in energy transition and climate resilience, thus fostering cross-regional collaboration also together with the private sector.

Within the ongoing UfM reform process, organisational capacity can be reinforced through a variety of measures that could enable the UfM to support proposed triangular projects. A strong majority of respondents (88 per cent rated it "very high" or "high") agreed that the UfM should collaborate closely with other regional ac-

tors “to improve high-level dialogue with the neighbours of the neighbours” (see graph 5). This widespread support reaffirms the potential role the UfM could play as an interface forum linking the three regional groupings.

Graph 5: Q.16 In the framework of the ongoing UfM reform, to what extent should the following elements help strengthening its role?



If the reform process of the Union for the Mediterranean takes longer than expected while some triangular projects are ready to advance, a “coalition of the active” –an alliance of countries from the EU, the SNPC and the GCC– could take the lead.

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

If the reform process of the Union for the Mediterranean takes longer than expected while some triangular projects are ready to advance, a “coalition of the active” –an alliance of countries from the EU, the SNPC and the GCC– could take the lead. This coalition would assume the political, financial, and administrative responsibility for specific triangular projects, such as the cleaning and protection of the Red Sea waters.

Conclusion

In conclusion, a truly balanced triangular partnership can offer a combination of each region’s strengths to address shared challenges and seize emerging opportunities. **By pooling investments through thematic funds, establishing joint innovation centres, and embedding cooperation within a reformed UfM framework, all partners can drive progress in clean energy production, marine protection, secure trade and economic connectivity, as well as conflict resolution.** Crucially, success hinges on equal participation and mutual respect, ensuring that Southern Mediterranean states are neither sidelined nor overshadowed. If designed and implemented with this spirit of reciprocity,

Triangular partnership’s success hinges on equal participation and mutual respect, ensuring that Southern Mediterranean states are neither sidelined nor overshadowed.

the triangular format could become a powerful engine for building resilience, prosperity, and sustainable development across the broader Euro-Mediterranean-Gulf region –for the benefit for all involved societies.

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Bridging public opinion and stakeholder perspectives on climate change in the Middle East and North Africa

Dr. Yasmina Abouzzohour
Princeton University

The rising salience of climate change in MENA

In the first half of 2025, wildfires swept across the outskirts of Jerusalem,¹ sudden flash floods hit Petra's Al-Siq,² and a historic heat dome drove temperatures in the United Arab Emirates to 50.4°C –the highest May reading on record.³ It is no surprise that regional assessments flag the Middle East and North Africa (MENA) as uniquely vulnerable.⁴ The region is warming roughly twice as fast as the global average – about 0.46°C per decade since 1980– and could be up to 4°C hotter by mid-century.⁵ These back-to-back calamities reflect a deeper regional trend, setting the stage for this paper's analysis of how MENA citizens and expert stakeholders perceive mounting climate risks and identify pathways toward resilience.

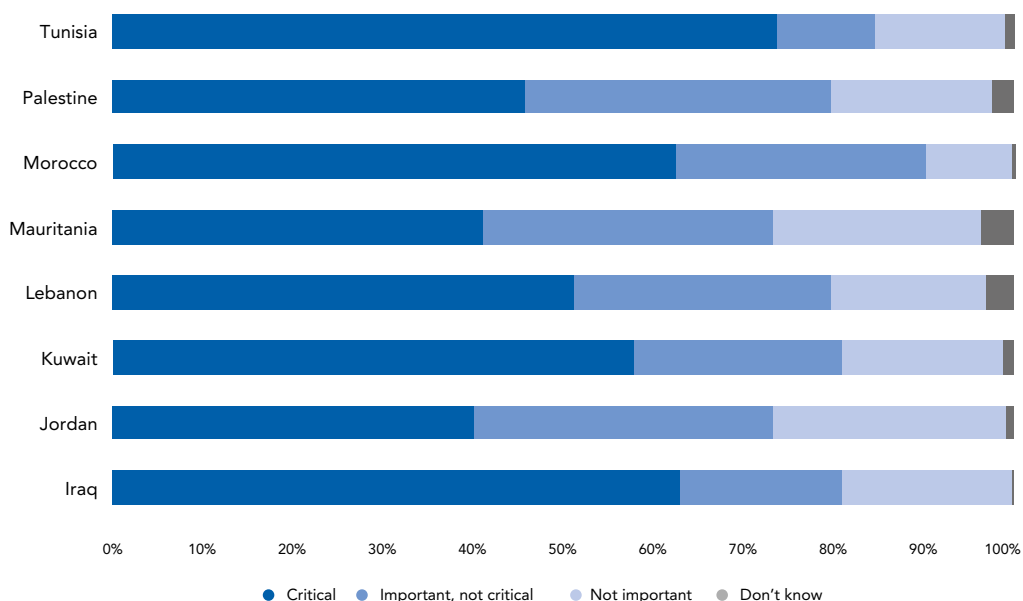
This paper draws on two new data streams. The Arab Barometer Wave VIII Survey was conducted in person with over 13,000 respondents across Tunisia, Morocco, Mauritania, Lebanon, Palestine, Jordan, Iraq, and Kuwait. It finds that a clear majority regards climate change as a serious national security threat, with water scarcity being the foremost environmental concern. The Euromed Survey 2025 canvassed 707 professionals –**including 256 from eight MENA countries in its Southern Neighbourhood**⁶– spanning government officials, academics, business leaders, NGOs, and technical experts. **These stakeholders place climate adaptation and mitigation among the highest priorities for Euro-Mediterranean cooperation.** By weaving public opinion and expert insights, this paper examines how climate risk perceptions translate into demands for government action, investment, and governance reform needed to build durable resilience.

These back-to-back calamities reflect a deeper regional trend, setting the stage for this paper's analysis of how MENA citizens and expert stakeholders perceive mounting climate risks and identify pathways toward resilience.

Climate threat perceptions and priority actions

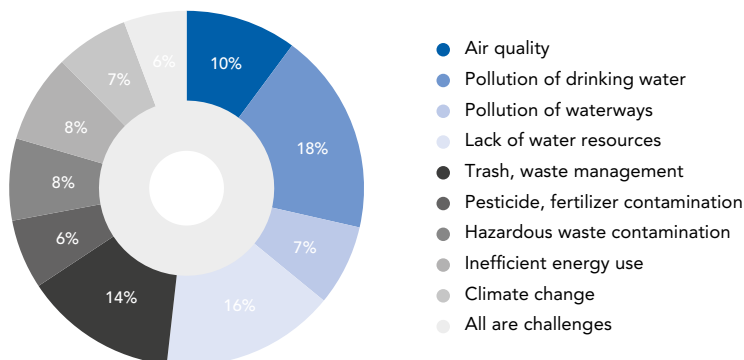
Climate change has become a clear security concern across the region, with 56 percent of MENA citizens now classifying it as a “critical threat” to national security, ranging from 74 percent in Tunisia to 40 percent in Jordan (see graph 1).⁷ Water-related issues top the list of popular environmental challenges –polluted drinking water (18 percent), lack of water resources (16 percent), and polluted waterways (7 percent) together account for 41 percent of first- or second-choice mentions, ranging from 55 percent in Tunisia to 29 percent in Kuwait (see graph 2).⁸ These findings are understandable, given that the region is home to 15 of the world’s 20 most water-stressed countries.⁹

Graph 1: Perceptions of Climate Change as a “Critical Threat” across MENA, 2023-2024



Source: Arab Barometer, Wave VIII, Question: To what extent do you see each of the following as a threat to national security interests? Climate change

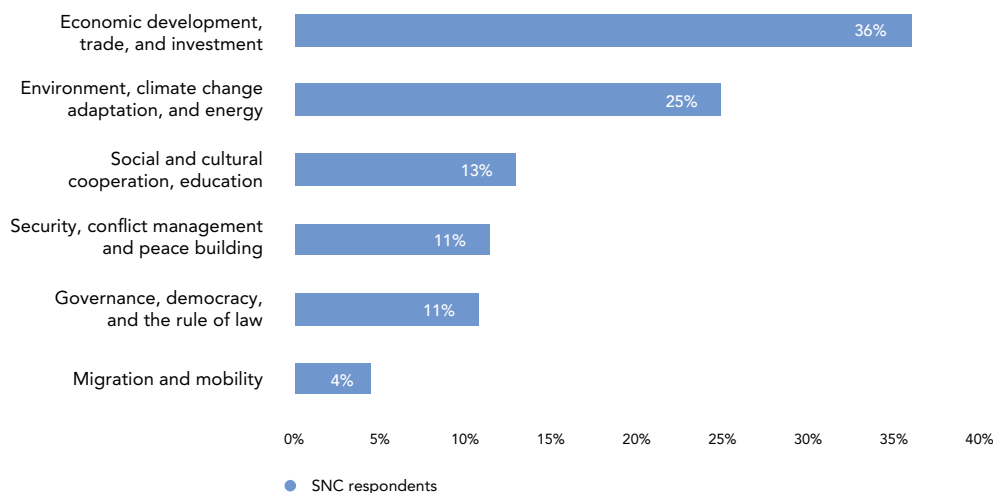
Graph 2: Most Important Environmental Challenges in MENA, 2023-2024



Source: Arab Barometer, Wave VIII, Question: Which of the following are the first and second biggest environmental challenges facing [your country]?

The region's policy community matches public anxiety. In the Euromed 2025 Survey, **one in four MENA stakeholders rank "Environment, climate adaptation, and energy" as the top priority for a new Euro-Mediterranean Pact¹⁰**—second only to "Economic development, trade, and investment" (36 percent) and well ahead of "Social and cultural cooperation" (13 percent), "Security and conflict management" (11 percent), "Governance and rule of law" (11 percent), or "Migration and mobility" (4 percent).¹¹ **This alignment suggests that climate-related threats, particularly water stress, sit near the top of the region's security agenda.**

Graph 3: Q.14 Which areas should those partnerships prioritise? (categories developed from open-ended answers)



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

Climate adaptation is judged crucial in principle, but it is not the main criterion by which most stakeholders assess EU performance: relatively few respondents associate the EU with tangible progress in this area.

Beyond threat perception, the consultancy's MENA respondents translate this shared sense of danger into concrete policy prescriptions. Eighty-seven percent rate intensifying climate adaptation cooperation as a high or very high priority for the New Pact (58 percent "very high," 29 percent "high").¹² However, **only 36 percent believe that EU cooperation on environmental and climate action has advanced since 2021. Among those who perceive a backsliding of the EU's presence (28 percent), just 16 percent single out Mediterranean adaptation as needing stronger engagement.**¹³

This reveals a perception gap: while adaptation ranks as a strategic priority, relatively few respondents associate the EU with tangible progress in this area. Those who think Brussels has stepped up occasionally cite climate work as evidence, but among those who view the EU's footprint as shrinking, adaptation rarely emerges as the key factor driving that perception. Put differently, adaptation is judged crucial in principle, but it is not the main criterion by which most stakeholders assess EU performance. **For the New Pact, this suggests two tasks: expanding adaptation cooperation to meet expressed demand and ensuring that any progress is clearly visible.**

When asked which instruments are important for structuring partnerships, Euromed stakeholders give top billing to "Investment instruments" (59 percent "very high" importance), followed by "Donor coordination" (52 percent), "Enhanced bilateral agreements" (49 percent), and "Open political dialogue" (48 percent).¹⁴ Open-ended testimony supports these numbers: **a Palestinian expert warns that "Water security is vital for both survival and economic development; without it, mitigation and adaptation efforts cannot succeed."**¹⁵ Their words highlight how water, energy, and mobility intersect –and why infrastructure innovations prioritized by stakeholders like renewable energy, clean technology, digital connectivity, and sustainable transport corridors must form the backbone of a more ambitious, people-centered Euro-Mediterranean climate strategy.

Infrastructure innovations like renewable energy, clean technology, digital connectivity, and sustainable transport corridors must form the backbone of a more ambitious, people-centered Euro-Mediterranean climate strategy.

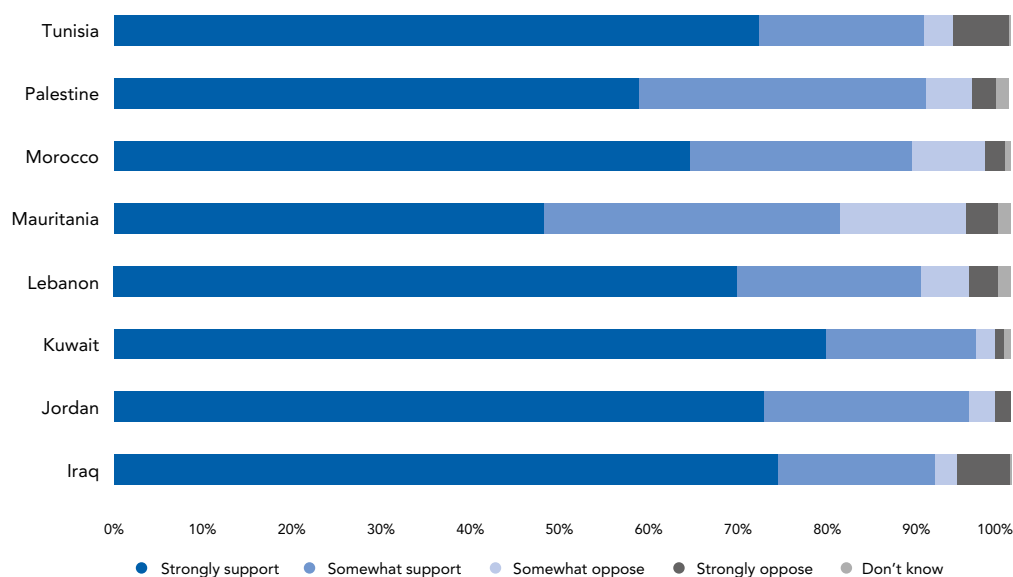
Across the region, 62 percent of citizens already believe their governments should "do more" on climate (ranging from 36 percent in Palestine to 80 percent in Morocco),¹⁶ and between 41 percent (Jordan) and 77 percent (Kuwait, Morocco) assign primary responsibility to national authorities.¹⁷ Nationally Determined Contributions reveal a similar spread in ambition: Morocco (18 percent unconditional; 27 percent conditional), Tunisia (27 percent; 18 percent), and the UAE (47 percent conditional) pledge substantial cuts, whereas Qatar (0 percent; 25 percent) and Iraq (2 percent; 15 percent) remain comparatively modest.¹⁸ **Meeting these expectations will require governments –and their European partners– to move beyond incremental tweaks toward comprehensive, large-scale reforms that match both the public's alarm and the expert community's policy blueprint.**

Infrastructure, investment, and innovation

Survey data also captures public and expert priorities for investment and infrastructure to strengthen resilience. Across the region, citizens overwhelmingly support prioritizing alternative energy development, such as solar or wind power, with sup-

port ranging from 89 percent in Morocco to 96 percent in Kuwait (see graph 4).¹⁹ This popular mandate dovetails with the priorities voiced by regional experts. **Asked to what extent four infrastructure pillars are important for regional integration, two-thirds of respondents (66 percent) assign “very high” importance to expanding renewables; 61 percent do so for clean-tech deployment, and 64 percent for building cross-border transport corridor.**²⁰ Some argue for interconnecting solar grids across the Mediterranean to facilitate cross-border electricity trade, investing in infrastructure for water management and resilience, and developing climate-resilient transport corridors to enable more efficient movement of people and goods across borders.²¹

Graph 4: Support for Alternative Energy Development across MENA, 2023-2024



Source: Arab Barometer, Wave VIII, Question: To what extent do you favor or oppose adopting each of the following measures? Have our government prioritize alternative energy development, like solar or wind power in [your country]

To translate these priorities into projects, stakeholders look to the EU’s Global Gateway, a strategy that finances and builds smart, clean, and secure infrastructure worldwide –linking regions through digital, energy, and transport networks while also strengthening health, education, and research systems.

Ninety-five percent of Euromed’s MENA stakeholders expect the Gateway to have a very high or high impact on upscaling green tech jobs. Expectations remain robust –yet taper gradually– for physical infrastructure upgrades (91 percent), regulatory alignment (87 percent), and private sector mobilization (85 percent).²²

Regulatory standards will be critical in determining which projects succeed. Furthermore, blended finance instruments, streamlined procurement, and targeted technical assistance, ambitious climate projects risk stalling.

Stakeholders emphasize that regulatory standards will be critical in determining which projects succeed. As one Tunisian expert cautions, **“EU standards must adapt to local administrative capacities,”** stressing that rigid norms could sideline vital projects.²³ Recent experience bears this out: Tunisia added only about 100 megawatts of new renewable capacity between 2016 and 2021, largely due to multi-layered procurement rules—modelled on EU directives—that stretched auction timelines and deterred investor.²⁴ More broadly, European development banks warn that strict sustainable finance taxonomy is already deterring green infrastructure investment in emerging markets.²⁵

Financing is the other critical bottleneck. Without blended finance instruments, streamlined procurement, and targeted technical assistance, ambitious climate projects risk stalling.²⁶ **To bridge this gap, the EU could establish a one-stop facility that packages concessional capital, risk guarantees, and tailored technical assistance, helping national agencies structure bankable projects, crowd-in co-financing, and monitor their impact.**

Governance, equity, and participation

Strong governance is the hinge between big-ticket infrastructure and real-world adaptation: without it, money and materials may never reach the communities that need them most. Expert stakeholders in the Euromed 2025 Survey reinforce this social justice mandate. They argue that **participatory governance—encompassing the engagement of local councils, NGOs, water-user associations, and youth networks—is the linchpin of durable resilience.** In practice, however, space is uneven: in Egypt, a 2019 NGO law subjects environmental groups to prior approval and intimidation, particularly when projects intersect with army-backed developments.²⁷ Recent protests over tourism construction in Wadi el-Gemal National Park further illustrate how conservationists and local communities can be sidelined despite formal consultation requirements.²⁸

Operationalizing equity demands multi-level coordination. In most MENA countries, ministries and agencies remain largely stove-piped, and the standing inter-agency working groups common in OECD systems are rare—an institutional gap that directly undermines coordinated climate governance.²⁹ **National ministries, municipal authorities, civil society organizations, and community cooperatives must co-design and co-manage climate projects.** Nevertheless, stakeholders report that overlapping mandates, opaque funding streams, and uneven technical capacities at the sub-national level frequently derail well-crafted plans.³⁰ Urban bias threatens equity, while limited technical capacity undermines effective delivery; tackling both is essential for projects to reach the people most at risk.

Addressing these governance gaps requires both legal reform—clarifying roles, harmonizing regulations, and ensuring fiscal decentralization—and targeted capacity-building programs that equip local administrators and community leaders with climate science literacy, project management skills, and techniques for public participation. Moreover, as **the proposed one-stop facility makes clear, blended-finance**

Without strong governance, money and materials may never reach the communities that need them most. Expert stakeholders in the Euromed 2025 Survey reinforce this social justice mandate.

instruments must incorporate these governance safeguards from the design stage, ensuring that capital and accountability travel together.

Conclusions and policy imperatives

Public-expert alignment in MENA presents both opportunity and responsibility. **Citizens and policy actors alike now view climate change –particularly water scarcity and environmental degradation– as a critical threat and are demanding urgent, transformative responses.** Recent surveys reveal a broad consensus, with calls for more decisive government action and intensified focus on adaptation and renewable energy investment.

However, this shared sense of urgency alone will not deliver results. The same findings highlight persistent barriers to implementation: insufficient investment, regulatory inconsistencies, institutional fragmentation, and limited local capacity. Turning this consensus into measurable progress requires a coordinated set of actions that bridge the gap between perception and delivery.

Shared sense of urgency on climate change alone will not deliver results. **Turning this consensus into measurable progress requires a coordinated set of actions (blended finance, regulatory frameworks, participatory governance) that bridge the gap between perception and delivery.**

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First, **the region must mobilize blended finance on a large scale.** Traditional grants and loans are insufficient to meet the needs for adaptation. The EU, multilateral development banks, and national treasuries should co-create blended finance platforms that pool small and medium-sized projects into investable portfolios. By combining concessional capital, guarantees, and technical assistance, such facilities can attract private investment into water, energy, and resilience infrastructure.

Second, it is essential to **streamline regulatory frameworks under the EU's Global Gateway while incorporating context-sensitive implementation measures at the sub-national level.** A clear, harmonized baseline of core standards would give investors confidence, and complementary sub-national mechanisms –such as one-stop permitting desks, regional procedural supplements, and targeted capacity-building programs– would enable municipalities and regional bodies to adapt procedures to their administrative capacities and socioeconomic contexts, thereby unlocking stalled projects and accelerating approvals.

Third, embedding equity through **participatory governance is critical.** For climate action to be legitimate and effective, it must reach those most at risk. Citizens and experts alike call for participatory mechanisms that elevate local voices and ensure climate finance benefits marginalized communities. Multi-stakeholder councils, public dashboards, community monitoring tools, and open-data platforms can help foster transparency and prevent elite capture.

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6. In the Euromed 2025 Survey, the Southern Neighbourhood countries are Algeria, Tunisia, Morocco, Mauritania, Lebanon, Palestine, Jordan, Kuwait, Egypt, Libya, Syria, and Israel.
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11. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 14: “Which areas should those partnerships prioritize?” -1st option

12. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 13: "To what extent do you consider the importance of the following elements in the framework of the New Pact for the Mediterranean?"

13. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 2: "In which specific areas can you bring forward positive examples of such an increased role?"; and Question 3: "In which specific areas would you have liked to see a more positive impact/stronger presence of the EU?"

14. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 12: "To what extent are the following elements/tools important to structure these partnerships?"

15. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 14 (open-ended responses).

16. Arab Barometer Wave VIII Survey (2023–2024), Question: "Do you think our national government should do more, less, or about the same amount as it is doing right now to deal with climate change?"

17. Arab Barometer Wave VIII Survey (2023–2024), "And to what extent do you think each of the following should be responsible for taking steps to address climate change? The government of [your country]?"

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19. Arab Barometer Wave VIII Survey (2023–2024), "To what extent do you favor or oppose adopting each of the following measures? Have our government prioritize alternative energy development, like solar or wind power in [your country]?"

20. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 18: "In your opinion, to what extent are these types of infrastructure important for regional integration?"

21. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 18: "In your opinion, to what extent are these types of infrastructure important for regional integration?"; and Question 14: "Which areas should those partnerships prioritize?"

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23. The European Institute of the Mediterranean, *Euromed Survey*, 2025, Question 17: "What impact could the Global Gateway strategy have on the following aspects?"

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27. Egypt: Government Undermining Environmental Groups. (2022, September 12) *Human Rights Watch*
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ANNEXES

I METHODOLOGY

II LIST OF RESPONDENTS

III QUESTIONNAIRE

SET OF RESULTS

(only available online at www.iemed.org)



I METHODOLOGY

METHODOLOGY

The Questionnaire

The questionnaire consisted of 18 questions, organized into two thematic blocks aligned with the European Commission's key priorities and areas of interest in the Euro-Mediterranean, as well as major trends in the region.

The first block addressed the EU's overall engagement with the Southern Neighbourhood, while the second focused on existing and potential cooperation frameworks and mechanisms.

A mix of open-ended and multiple-choice questions was used. The multiple-choice questions allowed respondents to select and rank various options or to rate them on a scale from "very low" to "very high." For these, an optional open-text field was included to elaborate on the response. This qualitative component was considered particularly valuable, as it enhances the interpretation of the results and offers deeper insights essential to a survey of this nature.

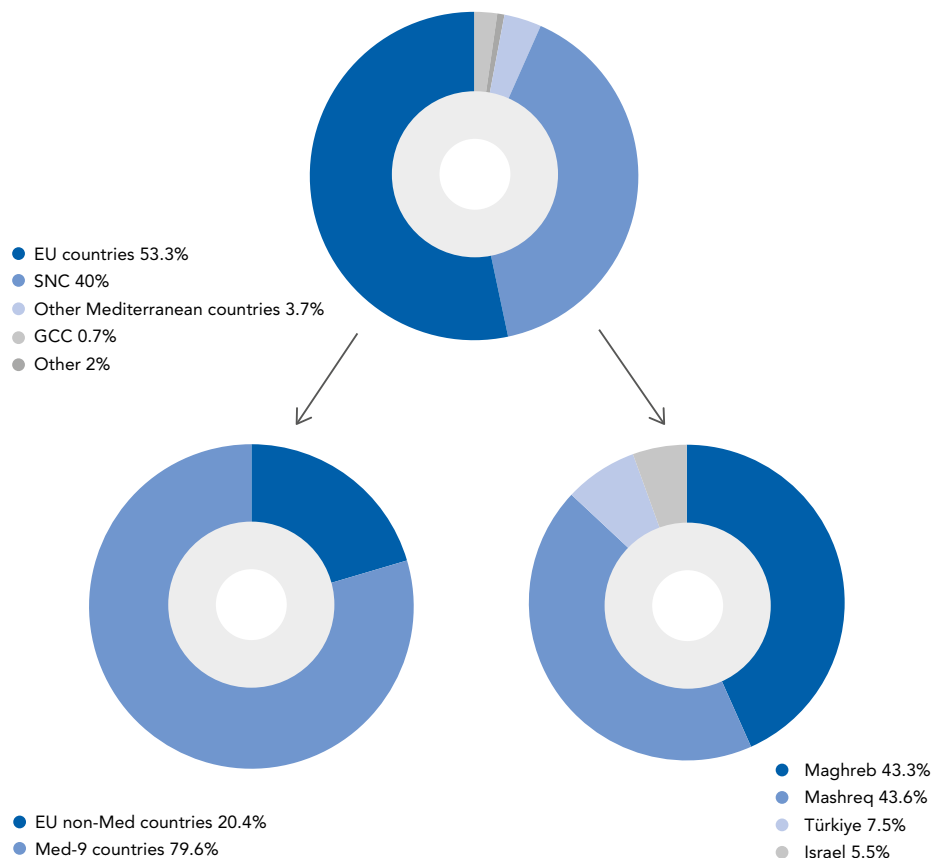
Survey Sample

To carry out the Survey, a pool of over 5,000 experts, stakeholders, and policymakers from both the European Union and Southern Neighbourhood countries was identified and invited to participate. As in previous editions, respondents were selected based on key reference criteria, including geographical distribution, institutional affiliation, area of expertise, and gender balance.

In this edition, a second participation modality was introduced to broaden the consultation process: a public campaign inviting contributions via an open-access link. This approach was designed to reflect the inclusive spirit of the Survey and to accommodate the specific aims of this edition. Notably, 55% of all respondents participated through this open-link modality.

In terms of geographical origin, 53% of participants were from the European Union, while 44% were from Southern Mediterranean countries.

Breakdown of respondents by geographical origin¹



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

1. **Southern Neighbourhood countries:** Morocco, Algeria, Tunisia, Egypt, Jordan, Lebanon, Palestine, Syria, Israel, Libya

Other Mediterranean countries: Albania, Montenegro, Türkiye

Gulf Cooperation Council: Kuwait, Qatar, Saudi Arabia, United Arab Emirates, (Bahrain, Oman)

Mashreq: Egypt, Jordan, Lebanon, Palestine and Syria

Other: United Kingdom, United States, Iran, Iraq, Pakistan

Maghreb: Morocco, Algeria, Tunisia, Libya

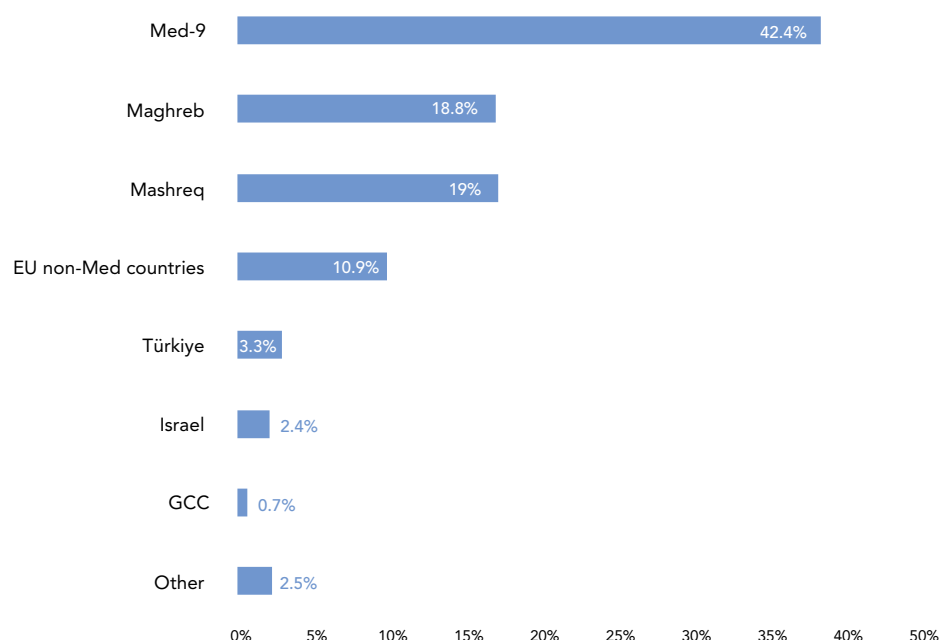
Med-9: Spain, France, Italy, Portugal, Malta, Cyprus, Greece, Croatia, Slovenia

EU non-Med: Austria, Germany, Denmark, Sweden, Belgium, The Netherlands, Luxembourg, Ireland, Finland, Estonia, Poland, Czech Republic, Hungary, Romania, (Bulgaria, Latvia, Lithuania, Slovakia)

In parentheses those countries without participants to the survey

The Mediterranean EU countries (Med-9)² was the subregional group with the highest turnout. Maghreb³ and Mashreq⁴ countries were sub-regional groupings with an important number of responses. The remaining EU countries and Türkiye came in third and fourth position.

Breakdown of respondents by region



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

In view of avoiding bias in the results and ensure better representativeness of the region, countries were weighted against specific targets in the sample. With this, the over-representation of certain countries, particularly active in the EuroMeSCo network (e.g. Spain, France, Italy, Morocco and Tunisia), was controlled.

2. Spain, France, Italy, Portugal, Malta, Cyprus, Greece, Croatia and Slovenia. The first three alone account for nearly 78% of responses from this region.

3. Maghreb countries include Morocco, Algeria, Tunisia and Libya. The first three alone account for 92% of responses from this region.

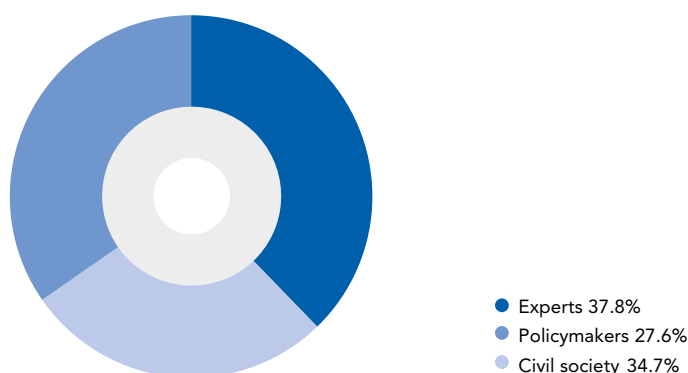
4. Mashreq countries include Egypt, Jordan, Lebanon, Palestine and Syria.

Profile of Respondents

In the first block of questions, in addition to providing their country of origin, respondents were asked to indicate their gender and the type of institution to which they belonged⁵.

As shown in the graphic below, the majority of respondents to the questionnaire were “experts”, an aggregated category that includes respondents from think tanks, and academia. Altogether, this group accounted for 38% of the total number of responses. The other categories are “civil society” (encompassing the third sector), accounting for 35%, and “policymakers” (including responses from European and international institutions as well as governments), representing 28% of the total number of responses.

Breakdown of respondents by type of institution

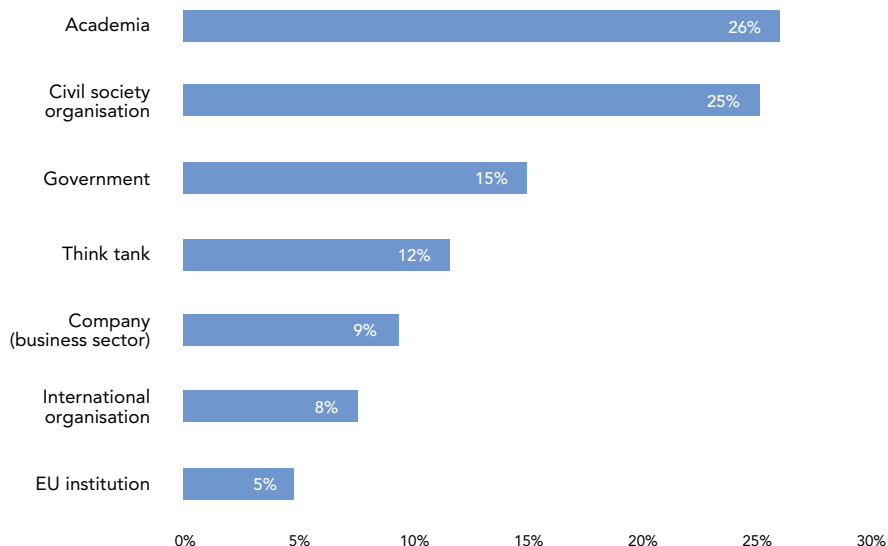


Source: Compiled by the IEMed based on the results of the NPM Euromed Survey

When looking specifically at the individual groups, “academia” and NGOs emerged as the most represented institutions (both groups together accounted for 50% of responses), followed by governmental institutions (15%) and think tanks (12%).

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

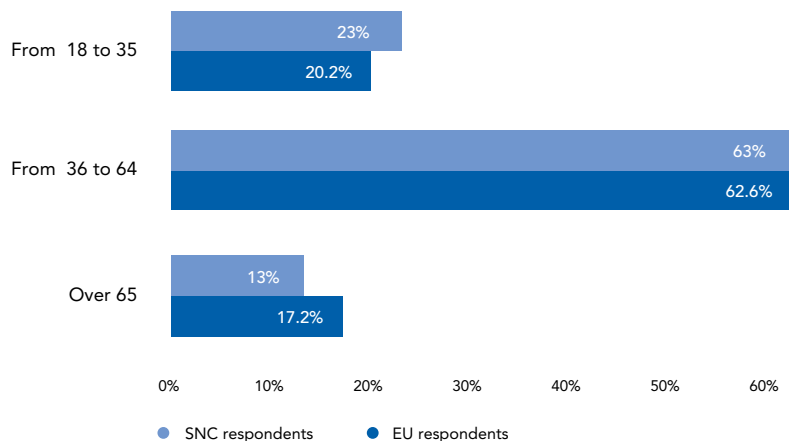
Breakdown of respondents by type of institution



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

Disaggregating respondents by age groups, over two-thirds of respondents fall within the 36-64 range. Compared to their EU counterparts, respondents from Southern Neighbourhood countries were somewhat younger, with a higher share aged 18-35 and a smaller share aged 65 and over.

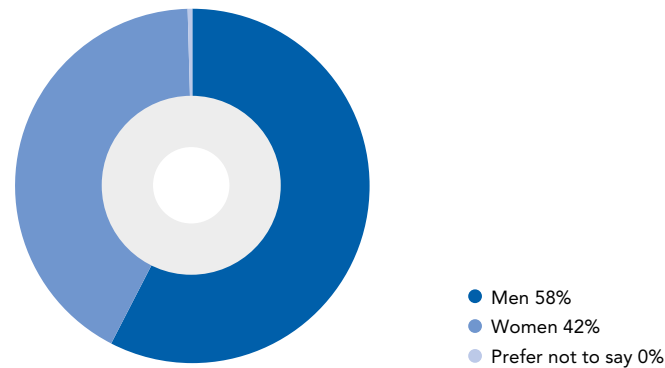
Breakdown of respondents by age



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

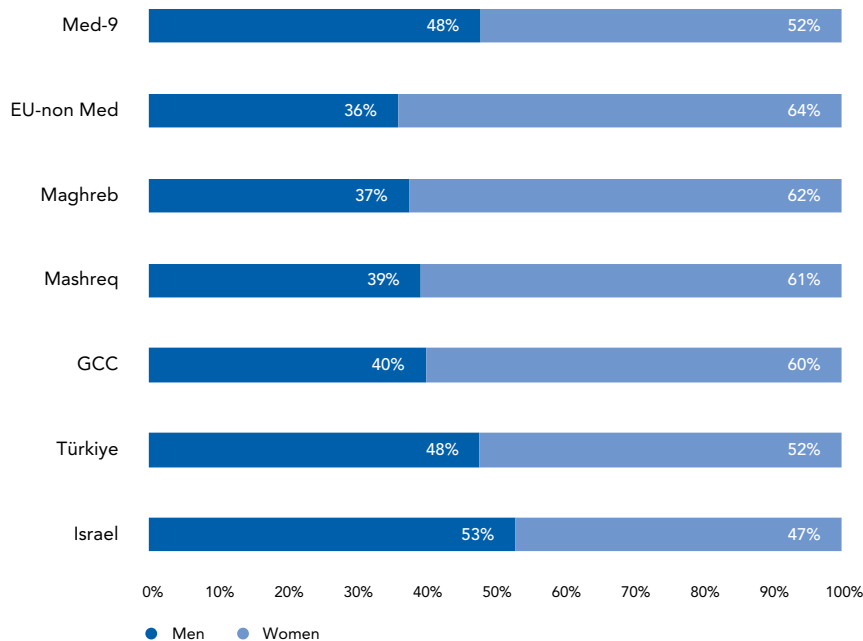
Finally, it is important to note that 42% of respondents were women. When analysing the North/South dimension, the aggregated proportion of women amounts to 37% for Southern Neighbourhood countries, while it increases to 45% for EU countries.

Breakdown of respondents by gender



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

Breakdown of respondents by gender



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



II LIST OF RESPONDENTS

LIST OF RESPONDENTS

Respondents were given the option to remain anonymous and not be included in the final list of participants. Out of the 707 individuals who completed the Survey, 144 chose not to have their names published. As a result, the final list includes 563 participants.

A'ID ABDULLAH AL-QANNOUN, MARIAM. Executive director. Subha and Dfiana Municipality. Jordan

ABBAS, IBRAHIM. Professor. Mansoura University. Egypt

ABDEL MONEM, MOHAMED. Chief Executive Officer. Climate Vision Consulting Company. Egypt

ABDEL-SADEK, ADEL. Director. Arab Center for Cyberspace Research (ACCR). Egypt

ABDIN, MARWAN. Founder & CEO. ACG – Abdin's Consultancy Group. Egypt

ABU ALHAIJA, IBTESAM. Senior Climate Change Expert. Ministry of Agriculture. Jordan

ABU KHATLA, SABREEN. Journalist and Executive Director. Qadarat – Our Voice Is Heard Team. Palestine

ABU SALIM, MOHAMMAD. Administration Director. New Ain Al-Basha Municipality. Jordan

ABU SHAMAA, MAHA. International Liaison & Cooperation Officer. Ministry of Tourism and Antiquities. Jordan

ABU-EL-HAIJA, AHMAD. Director. National Erasmus+ Office. Jordan

AHD OUSH, YOURSI. Director of Partnerships & Employment Follow-Up. Ministry of Labour. Palestine

AIT ALI, HASSAN. Professor. Université Hassan II. Morocco

AIT-CHAALAL, AMINE. Professor. GERMAC UC Louvain. Belgium

AKEF BZIOUECH, SAMRA. Post-doc. Institut Supérieur Agronomique Chott Mériem (ISA-C). Türkiye

AKL, ELIE. Vice Provost for Research. American University of Beirut. Lebanon

AL MASRI, ZIAD. Chief Programs Officer. Intaj – ICT Association Jordan. Jordan

AL-SHALABI, JAMAL. Prof. Dr. Hachémite University. Jordan

ALAGHA, JOSEPH. Prof. of Political Science & Intercultural Studies. Haigazian University. Lebanon

ALARANTA, TONI. Senior Research Fellow. Finnish Institute of International Affairs. Finland

ALASHI, JALAL. Ambassador. Mission of Libya to the EU. Libya

AL-ASMAR, WADIH. Président. Centre Libanais des Droits Humains. Lebanon

ALBABAW, MUHSEN. Program Development and Delivery Manager. Majlisna for Community Development. Jordan

ALBERTI, FABIO. Honorary President. Un Ponte Per. Italy

ALBINYANA, ROGER. Managing Director. European Institute of the Mediterranean. Spain

ALBRACHT, LESLIE. Advocacy and Communications Officer. IECD (MedNC network). France

AL-DIWARY, JAWAD. NGO Manager. Martil Associations Forum. Morocco

ALESSANDRINI, SERGIO. Professor. UNIMORE. Italy

ALEXANDRU, NICULITA. Head of International Cooperation Unit. CEPOL. Romania

AL-FAQIH, ZAKARIA KHALED. Executive Director. Afaq Al-Hiwar Foundation. Libya

ALFONSO, LAURENT. Civil Protection Advisor. Ministère de l'Europe et des affaires étrangères. France

ALHADID, RAND. University Student. Jordan

AL-HAWAMDEH, FAYHA. Program Manager. Rahma Worldwide. Jordan

ALI, MUMTAZ. Assistant Professor. Near East University. Pakistan

ALI AL-ZWI, ISMAIL. Executive Director. Nabra Platform. Libya

ALKANDARI, ALI. Associate Professor. Kuwait University. Kuwait

ALKAWASMEH, SAHAR. General Director. Roles for Social Change Association (ADWAR). Palestine

ALKHALIL, AMAL. Executive Director. Bab Amman Municipality. Jordan

ALMERAS, GUILLAUME. Managing Partner. BGV Consulting. France

ALNABER, MAJD. General Director. WANA Institute. Jordan

AL-OMARI, AYMAM. Director, Environmental Department. Zarqa Municipality. Jordan

ALOS, ANA. Head of Cooperation Projects Department. Barcelona Provincial Council. Spain

AL-QADI, FADI. Jordan

AL-RUKAYBĀT, RASHA AHMED. Agricultural Research Scientist. National Center for Agricultural Research. Jordan

ALSALLOUM, RAMI. Education Assistant. NRC. Syria

ALSHARIGY, WEDAD. International Humanitarian Law and Youth Initiative. Libya

AL-SHDEIFAT, CARMEN. Organization Manager. Manṣhiyat Bani Hassan Municipality. Jordan

ALSHGAIRAT, HUSSEIN. Researcher (Retired). Jordan

AL-TAMIMI, NASER. Senior Associate Research Fellow. ISPI. United Kingdom

ALTURKEY, ABDUSALAM. Abdusalam Alturkey. Libya

ALZOUBI, SAFA. Head of Development Unit. AlMirad Municipality. Jordan

AMATO, CIRO. Director. Integral Human Development Institute – ISVUMI. Italy

AMER, GHADA. AI Expert. IDSC – Cabinet. Egypt

AMMOURI, NIDAL. Former President and Board Member. Shabeeb Palace Tourism and Crafts Association. Jordan

AMPRASI, VASILIKI. Research Associate. University of West Attica. Greece

ANNETIS, MANOLIS. Research Engineer and Project Manager. National Technical University of Athens. Greece

ANTONACCI, ALESSANDRO. Civil servant. Regione Puglia. Italy

AOUADI, MERIEM. Consultant and Researcher. Stratify Fashion. Tunisia

AOUHAB, BARAKA. President. Third Millennium Association for Development and South Cooperation. Morocco

APPRIOUAL, ANTOINE. Programme Manager. European Institute of the Mediterranean. France

ARAFAT, MODY. Free Business. Egypt

ARENA, MARTA. Doctor. EHESS. Italy

ASEM, SALAMA. Associate Professor. National Research Institute of Astronomy (NRIAG). Egypt

ASMAR, GHAZI. Assistant Vice-President. Notre Dame University – Louaize. Lebanon

ATTALLAH AL-ZA'IM, ALAA KAMEL. Founder. Alaa Kamel Al-Za'im Vegetable Farm. Jordan

ATTINÀ, FULVIO. Professor. University of Catania. Italy

ATZORI, ANGELA. Officer. DG EAC. Italy

AUBARELL SOLDUGA, GEMMA. Director of Gender, Culture and Civil Society. European Institute of the Mediterranean. Spain

AVANTAGGIATO, MASSIMO. President and EU Projects Coordinator. UNISCO. Italy

AYADOUN, SIDAHMED. President. Jeunesse Volontaire. Algeria

AYASH, MOHAMMAD. Head of Engineering Department. Ma'adi Municipality. Jordan

AYOUB, KAOUANE. Communication Specialist. Anna Lindh Foundation. Algeria

AZAIÉZ, HAJER. Professor. CERTE. Tunisia

BADR, MOUSTAFA. Founder. Act Space for Training and Consulting. Egypt

BAHOUT, JOSEPH. Director and Associate Professor. American University of Beirut – IFI. Lebanon

BAIJOU, AHMAD. Professor. Al Akhawayn University in Ifrane. Morocco

BAKHALLOU, CHAYMAE. Teacher. Private Sector. Morocco

BALLETBÒ PUIG, ANNA. Chairwoman. Olof Palme International Foundation. Spain

BALP, MAHALIA. Advocacy Advisor for North Africa. Médecins du Monde Belgique. France

BANGOURA, AHMED. PhD Candidate. Abdelmalik Essaadi University. Morocco

BAN NOUR, ALI. Programme Manager. Tunisian Centre for Social Entrepreneurship. Tunisia

BANTLA, KAMILIA. PhD Student. Euromed University of Fez. Morocco

BARAH, MIKAÏL. Associate Professor. Saint Louis University – Madrid Campus. France

BARAKAT, OMAR. Mental Health Case Manager. Embrace. Lebanon

BARHOUM, TAREK. Student Affairs Director. Arab International University (AIU). Syria

BARRAS TEJUDO, RAQUEL. Lecturer, International Relations & Security. Complutense University of Madrid. Spain

BARREDA, JAVIER. Professor. University of Alicante. Spain

BARREÑADA BAJO, ISAÍAS. Lecturer, International Relations. Complutense University of Madrid. Spain

BARTHEL, PIERRE-ARNAUD. EFSD+ Investment Officer. DG ENEST. France

BASSO, DANIELA. Full Professor. University of Milano-Bicocca. Italy

BEDOS, NÚRIA. Chargée de Mission. Government of Catalonia. Spain

BEJAQUI, MUSTAPHA. Lecturer-Researcher. University of Carthage – FSB Biosurveillance Lab. Tunisia

BELAALIYA, M. HAMMED. President. Association Alizdihar. Morocco

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III QUESTIONNAIRE

1. EU'S OVERALL ENGAGEMENT WITH THE SOUTHERN NEIGHBOURHOOD

Q.1 In your opinion, since the launch of the new Agenda for the Mediterranean in 2021¹, the role/impact of the EU in its Southern Neighbourhood has:

1. Increased	
2. Remained stable	
3. Decreased	
4. Don't know	

Why?	
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If Q.1 = 1

Q.2 In which specific areas can you bring forward positive examples of such increase role?

1.	
2.	
3.	

How?	
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If Q.1 = 2 or 3

Q.3 In which specific areas would you have liked to see a more positive impact/stronger presence of the EU?

1.	
2.	
3.	

How?	
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1. In 2021, the EU's joint communication from the EEAS and Commission on a 'Renewed partnership with the Southern Neighbourhood: A new Agenda for the Mediterranean' aimed to inject new dynamism into its relations with the region.

Q.4 In your opinion, to what extent are the following actors playing a major role in the Southern Neighbourhood?

	Very high	High	Low	Very low	Don't know
1. European Union					
2. Türkiye					
3. China					
4. Russia					
5. Gulf countries					
6. United States					
7. Other you may consider:					

Q.5 In your opinion, what is the added value of the EU cooperation compared to the other actors?

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Q.6 In your opinion, what is the best potential that can be achieved through the partnership between the EU and its Southern Neighbourhood? (select only one option)

1. Geopolitical alliances and stability	
2. Regional integration	
3. Economic growth	
4. Achieving Sustainable Development Goals (SDGs)	
5. Mutual understanding	
6. Other you may consider	

Why?	

Q.7 In your opinion, the impact of the EU's response to the conflict in Palestine (select only one option):

1. Has been a balanced response	
2. Damaged the EU's reputation in the region	
3. Harmed its ability to influence through diplomacy and shared values	
4. Damaged its commitment with human rights and rule of law	
5. Other you may consider	
6. Don't know	

Why?	

Q.8 The EU is the biggest donor of aid to Palestinians residing in Gaza and the West Bank. The financial support is used to pay salaries and pensions, improve health services and access to water, and provide humanitarian aid in times of conflict.

In your opinion: to what extent should the EU prioritise the following elements, to be effective and helpful in the Day-After scenario?

	Very high	High	Low	Very low	Don't know
1. Remain the most important donor to Palestine					
2. Play an active role in the negotiation of the Palestinian Authority reform					
3. Recognise the state of Palestine					
4. Expand sanctions on Israeli West Bank settlers					
5. Rebuild human capacity in Gaza (civil society, businesses, academia)					
6. Other you may consider:					

Why?	

Q.9 In your opinion: to what extent should the EU prioritise the following elements to be effective and helpful in the new Syrian scenario/Syrian transition?

	Very high	High	Low	Very low	Don't know
1. Play an active role in the negotiation among main actors in Syria					
2. Reconstruction: economic support comprising sanctions exemptions					
3. Reopen cooperation with Syria					
4. Foster refugee: comprehensive protection for a safe return					
5. Other you may consider:					

2. COOPERATION FRAMEWORKS AND MECHANISMS

Q.10 In your opinion: To what extent should the EU's relations with Southern Neighbourhood partners...

	Very high	High	Low	Very low	Don't know
1. Be more equal/balanced					
2. Help enhance its domestic legitimacy (political, multi-level governance and societal support)					
3. Introduce a long-term vision for reforms					
4. Enhance flexibility					
5. Be aligned with partner's institutional capacities and resources					
6. Contribute to the resolution of long-standing conflicts					
7. Other you may consider:					

Comments:

Q.11 Under this New Pact, to what extent should the following elements be useful to better engage with the Southern Neighbourhood partners?

	Very high	High	Low	Very low	Don't know
1. Engage effectively with other major players active in the region					
2. Shape a strong partnership model					
3. Strengthen the regional dimension					
4. Reaffirm conditions and incentives for cooperation					
5. Other you may consider:					

Comments:

Q.12 The New Pact for the Mediterranean toolbox: To what extent are the following elements/tools important to structure these partnerships?

	Very high	High	Low	Very low	Don't know
1. Investment instruments					
2. More coordination among donors (such as Team Europe Initiatives)					
3. More open political dialogue					
4. Enhanced bilateral agreements					
5. Other you may consider:					

Comments:	
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Q.13 Priorities of the New Pact for the Mediterranean: To what extent do you consider the importance of the following elements in the framework of the New Pact for the Mediterranean?

	Very high	High	Low	Very low	Don't know
1. Scaling up and deepening trade and investment towards a more integrated Euro-Mediterranean market					
2. Setting up a Trans-Mediterranean Energy and Clean Tech Cooperation Initiative					
3. Establishing partnerships to operationalise the external aspects of EU's migration policy					
4. Ensuring a focus on good governance and the rule of law					
5. Enhancing deeper cooperation on security, fighting organised crime and terrorism					
6. Fostering talent and skills for upscaling jobs					
7. Intensifying cooperation on climate adaptation					
8. Engaging more on the cultural dimension					
9. Other you may consider:					

Comments:

Q.14 Which areas should those partnerships prioritise?

1.	
2.	
3.	

Why?

Q.15 The Union for the Mediterranean (UfM) can offer a unique platform where mutual interests are pursued at equal level, and to seek new avenues to promote regional cooperation mechanisms. To what extent do you agree with this proposal?

	Very high	High	Low	Very low	Don't know

Why?	
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Q.16 In the framework of the ongoing UfM reform, to what extent should the following elements help strengthening its role?

	Very high	High	Low	Very low	Don't know
1. Upgrading its political mandate					
2. Becoming an operational interlocutor by improving its technical and financial capacities					
3. Deepening its current institutional mechanisms in order to generate more impactful results at country level					
4. Working closely with other regional actors to improve high-level dialogue with the neighbours of the neighbours					
5. Other you may consider:					

Comments:	
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Q.17 Global Gateway is a European strategy to boost smart, clean and secure links in digital, energy and transport sectors and to strengthen health, education and research systems across the world, through investments in infrastructure.

What impact the Global Gateway strategy could have on the following aspects?

	Very high	High	Low	Very low	Don't know
1. Physical infrastructures					
2. Improving regulatory frameworks					
3. Upscaling jobs in green, technology and entrepreneurship sectors					
4. Mobilising the private sector					
5. Other you may consider:					

Comments:	
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Q.18 In the Southern Neighbourhood, a number of projects, among others, seek to build infrastructure investments that create sustainable, smart, resilient, inclusive and safe networks in all modes of transport. In your opinion, to what extent are these types of infrastructure important for regional integration?

	Very high	High	Low	Very low	Don't know
1. Sustainable transportation networks / corridors					
2. Digital connectivity					
3. Investments in renewable energy					
4. Clean technology					
5. Other you may consider:					

Comments:	
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