

6th EDITION

ROME 2020

MED

MEDITERRANEAN DIALOGUES

ISPI

ITALIAN INSTITUTE
FOR INTERNATIONAL
POLITICAL STUDIES

NAVIGATING THE PANDEMIC

REPORT

NAVIGATING THE PANDEMIC

**The challenge of stability
and prosperity in the Mediterranean**

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Four in the Morning

*This report is published on the occasion of the sixth edition
of Rome MED – Mediterranean Dialogues, 25 November- 4 December 2020,
promoted by the Italian Ministry of Foreign Affairs and International Cooperation and ISPI.*

The opinions expressed herein are strictly personal and only reflect the positions of the authors.

PREFACE

This year marks the sixth edition of Rome MED – Mediterranean Dialogues, the annual conference promoted by the Italian Ministry of Foreign Affairs and International Cooperation and ISPI.

In times of global pandemic, Rome MED has turned into a virtual year-long initiative, with the participation of hundreds of policy-makers, representative of international organisations and experts from all around the world with the aim of navigating solutions for a post COVID-19 era.

The 2020 edition of the Report provides deep and insightful analyses, policy recommendations and a vast array of data and infographics to stimulate discussion and inspire innovative ideas during our MED dialogues. Following the four traditional thematic sections – shared security; shared prosperity; migration; civil society, culture and media – the Report focuses on a selection of crucial topics, highlighting both the challenges and the dynamics taking shape in a region that has been hard hit by the coronavirus. Indeed, all Middle East and North Africa countries are engaged in the fight against this new, common enemy. Here, as elsewhere in the world, the pandemic has triggered a deep economic crisis that has affected all regional economies. However, here more than elsewhere, the coronavirus has impacted on a context already marred by socio-economic vulnerabilities, inequalities and instability. Furthermore, while confrontation continues to characterise a region where conflicts remain unsolved, geopolitical shifts are bringing about a reconfiguration of the regional order with long-term implications. Against this backdrop, one of the main questions to address is how to turn the pandemic into an opportunity to find long-term solutions that can foster stability and prosperity in the Mediterranean.

Last but not least, I wish to sincerely thank all the participating scholars and experts for their insightful contributions to this publication. Their perspectives are crucial for a deeper understanding of the region and its future prospects, and their constant support was essential throughout the process that has led to this Report.

Paolo Magri

ISPI Executive Vice President

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***SHARED
SECURITY***

The impact of the pandemic on geopolitics in the MENA region

Vali Nasr

Majid Khadduri, Professor of International Affairs and Middle East Studies
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The Middle East was impacted early on by the COVID-19 pandemic. The global outbreak and its aftermath are changing the region's geopolitical dynamics in important ways. The impact of the pandemic has unfolded in waves. First of all, COVID-19 was a major health crisis, concentrated most heavily in Iran, but also taking a toll on the region as a whole, especially where governance has been weakest and the healthcare system was under tremendous stress. The numbers of the sick and dying are worrisome, but what is more is that the pandemic is limiting access to health care services to broad swaths of the population, increasing the impact of other health issues on societies and economies.

The health crisis was quickly followed by a region-wide economic calamity. With economic shutdowns in Asia, Europe and the Americas, global demand for the region's exports – oil, petrochemicals and manufacturing – and the region's other sources of revenue, tourism and financial services, plummeted. The price of oil at one juncture fell into the negatives. Almost every regional producer needs oil prices to be at \$60 or more to satisfy their budget needs. Low oil prices have spelled serious budgetary trouble for many states. Another nefarious secondary effect was the reduction of demand in oil-rich countries for migrant labour, leading to cuts in the aid and investment they supply to the rest of the region.

By the summer of 2020, the region faced an estimated \$300 billion financial shortfall. Stimulus packages and emergency borrowing could at best make up for half of that loss, and only for a short time. Economies from Morocco to Saudi

Arabia face economic retrenchment and difficult reforms. For instance, oil-rich Saudi Arabia was forced to raise value-added tax (VAT) three-fold while also cutting back on entitlement benefits for government employees. According to the International Monetary Fund (IMF), economies across the region are expected to shrink on average by 5.1% in 2020. Iran's sanctions-strapped economy could shrink by 7%. Only Saudi Arabia, the United Arab Emirates (UAE), Qatar and Kuwait have enough reserves to cushion the blow, but even they are drastically cutting public spending. The fate of the region's economies greatly depends on how quickly global demand rebounds, but even then, some economic scars will remain.

\$300 billion

Financial shortfall
in the MENA region
by summer 2020



Already, economic pain has struck the poor, the private sector and the informal economy. Belt tightening will soon have to extend to the public sector and salaried employees, and more broadly to government subsidies and also social services. Governments across the board, even in oil-rich Persian Gulf countries, will have to scale back social contracts that undergird political stability. Saudi Arabia for instance is cutting \$266 in monthly payout to government employees. It is also reviewing other entitlement benefits.

Prolonged economic suffering, and the inevitable changes to social contracts that lie at the foundation of social stability in the region, will have political ramifications. Whether in states large or small, oil-rich or fragile, an economic

THE PRICE OF OIL IN THE COVID ERA

OPEC oil basket price from October 2019 to November 2020



Data: OPEC

shock of this magnitude is likely to impoverish the middle classes, aggravate poverty, and exacerbate income inequality. And that would stoke discontent, turmoil and violence. Economic pressure on economies already under strain, as in Iran, Iraq or Lebanon, portend to even more pronounced social pressure.

COVID-19: WILL THE PANDEMIC ACCELERATE HISTORY?

The Middle East was particularly unprepared for this crisis. The pandemic hit as drawn-out civil wars raged in Libya, Syria and Yemen, the terrorist movements of the Islamic State and al-Qaeda remained a threat, and Iran and America stood at the edge of war. For a decade following the Arab Spring, angry crowds had taken to the streets to protest economic stagnation and weak governance by sclerotic dictatorships that have left their populations frustrated and angry. Initially, fear of contagion and lockdowns sent the crowds home, but popular frustration has continued to gain steam. In fact, the pandemic has made every crisis a potential starting point for political upheaval. This was evident in the wake of the devastating explosion at the port of Beirut. The catastrophe quickly brought to the

fore public anger, especially as reconstruction looked more daunting in the face of economic weakness.

There is fear that the pandemic will accelerate history. The economic pressure and popular anger are likely to lead to more conflicts, accompanied by unsavoury ideologies, regime brutality, revolutions, insurgencies and humanitarian crises. That means that states will be forced to change, and some may even fall.

\$266

Cut in Saudi government employees' monthly payout due to COVID-19 crisis

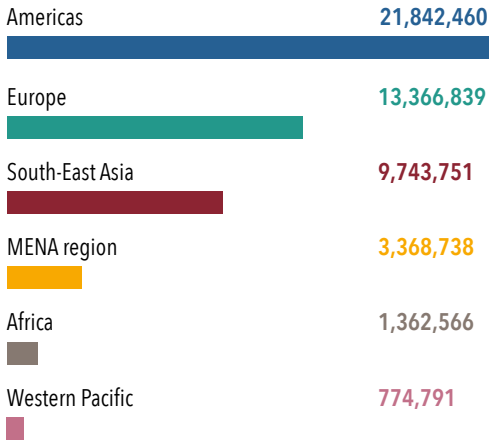


Paradoxically, the Trump administration has seen some promise in this outcome, hoping the pandemic will break Iran's Islamic Republic. But that is a narrow vision, because the pandemic calls for a reckoning across the whole region. The expectation would be that Middle Eastern states with precarious economies will soon face socio-political upheaval. However, in the wealthier states that have tied their legitimacy to grand visions of the future, the psychological impact of diminished ambitions also poses challenges.

THE GLOBAL IMPACT OF COVID-19

Number of COVID-19 cases by region

(As of 10 Nov 2020)



Data: WHO

Saudi Arabia has put mega projects like the futuristic city of Neom on hold, and Dubai has postponed Expo 2020. The region's trendsetting developments seem to point to a less ambitious future, scaling back operations and laying off workers.

There is a common interest across the region to contain the political fallout. No government in the region would welcome a social revolution or a wave of democracy. And every country in the region will have to rely on the region's resources, people, money but also on trade, to foster economic growth. Regional rivalries have not gone away, but the pandemic is placing them in a new context. Stability at home will demand not just less regional rivalry, but also greater cooperation as the region seeks to overcome the aftershocks of the pandemic. Every country would benefit from reducing tensions, winding down wars, avoiding new ones, and spending less on clients and proxies and extravagant military procurements. Indeed, Saudi Arabia is looking to end the war in Yemen, and Iran seems supportive. Iran has withdrawn some of its troops from Syria, and reduced tensions in Iraq. The UAE has normalized relations with Israel and expanded its engagement with Iran.

THE REGIONAL SCRAMBLE FOR THE MIDDLE EAST

This tendency to look inward however is balanced by the implications of a larger change in the geostrategic context for the region. The pandemic has changed the world order in important ways. The economic impact on the United States, China and Europe is profound, and it will force each of those power centres to also reassess their priorities. The US will likely expedite its withdrawal from the Middle East. Despite worries about the scourge of terrorism, energy security, the challenge of Iran and hopes of solving the Arab-Israeli dispute, American commitment in the region is fading. There is growing consensus across the political spectrum in the US that the Middle East's strategic significance does not justify continuation of significant investment of American resources there. The cost of the pandemic and the intensification of the confrontation with China is only further entrenching this view and will expedite what started as a pivot to Asia during the Obama administration.

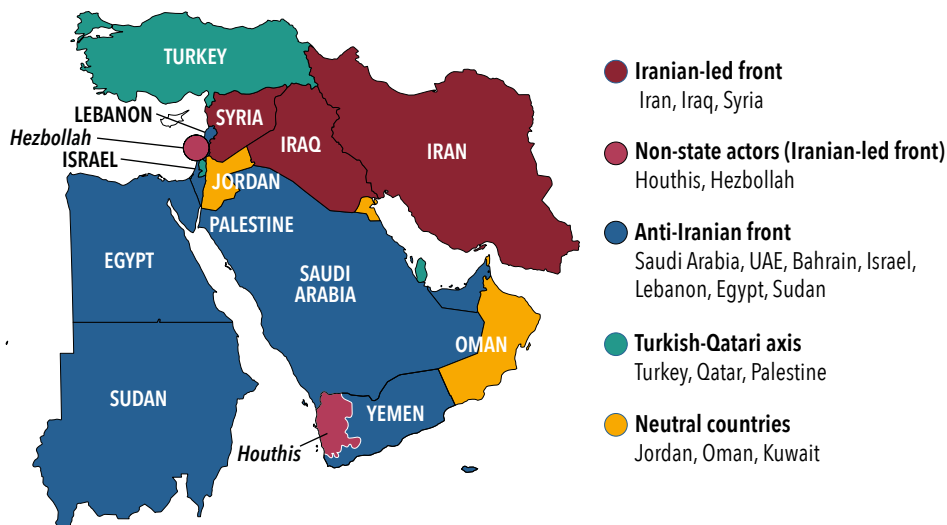
The Trump administration claims otherwise, but in the region the winds of change are picking up. The US is negotiating an end to its military engagement in Afghanistan. It is reducing troop numbers in Iraq and Syria and has even removed Patriot missile systems from Saudi Arabia. In a region beset by conflict and lacking any formal regional security institutions, the United States has provided its most notable security architecture and prevented major realignments in the balance of power. The prospect of American departure will be a major change to the region.

The Middle East will be increasingly on its own. This will inevitably unleash more intense competition for power and influence in the region. The most obvious axes of competition will be between Iran and its Persian Gulf neighbours, Saudi Arabia, Bahrain and UAE, but also between Saudi Arabia and UAE and Qatar.

The US departure will also unleash another consequential competition between Iran, Israel and Turkey. The American invasion of Iraq and the Arab Spring protests have shattered Arab order, leaving behind a string of weak states and civil wars. These non-Arab powers have taken advantage of the vacuum to fulfil their nationalist aspirations.

MIDDLE EAST: NEW OLD FRONTS?

Regional alignments in the Middle East (2020)



In the recent past, Israel has annexed Syria's Golan Heights and is expanding its borders into the West Bank. It also seeks greater influence in Syria and Lebanon to counter Iran's menacing perch there. Turkey and Iran are vying for spheres of influence stretching from North Africa to the Persian Gulf. Iran has expanded its foothold in Lebanon, Syria, Iraq and Yemen. Once enthralled with Europe, Turkey is now turning its gaze southward, looking past lines drawn in the World War I era by the Treaties of Sèvres and Lausanne, to reclaim influence in former Arab domains of the Ottoman Empire. Turkey is wielding its influence in Iraq, it has occupied parts of Syria and inserted itself in Libya's civil war and the conflict between Azerbaijan and Armenia in the Caucasus. Backed by the US, Saudi Arabia and the UAE have led Arab resistance against these encroachments, going to war in Libya and Yemen to thwart the aspiration of Turkey and Iran. The normalisation of ties between the UAE and Israel will open the door to a Persian Gulf-Israeli front push-

ing back against Turkey and Iran. The tensions between Iran and Israel have escalated significantly in recent years. But in the scramble for the Middle East, there is also Turkey that features prominently. Its relations with Israel, Saudi Arabia, the UAE and Egypt have steadily deteriorated over the past decade. Turkey has raised the ire of Saudi Arabia, the UAE and Egypt by supporting the Muslim Brotherhood, and staunchly defending Qatar and the Tripoli government in Libya's civil war. Its assertive claims in the Mediterranean challenge both Egypt and Israel alike.

3,368,738 Total number of COVID-19 cases in the region (as of 10 Nov 2020)



The pandemic has changed the context for regional politics and put before its states domestic and regional priorities that do not easily cohere. This will make the region's politics more unpredictable and dangerous.

The sad demise of Europe's imagined Mediterranean

Rosa Balfour

Director, Carnegie Europe

When France announced it was to join naval exercises in the East Mediterranean at the end of August 2020 to support Greece in its escalating stand-off with Turkey, the Defence Minister Florence Parly asserted that the Mediterranean should be a place of “stability and respect for international law” rather than “a playground for the ambitions’ of certain actors”.¹ This was very much the spirit of the Euro-Mediterranean Partnership (EMP), also known as the Barcelona Process from the name of the city where it was launched 25 years ago. It imagined the Mediterranean as a space of “peace and stability”, “shared prosperity”, and “understanding between cultures” in full respect of international norms.²

Events did not favour the construction of this imagined Mediterranean. That space continued to witness deteriorating and deadly contrasts between ambition and political realities. The Barcelona Declaration was penned in the context of optimism over the Oslo Accords; five years later, the leader of Israel’s political opposition Ariel Sharon visited the Temple Mount in Jerusalem and sparked the second Intifada, from which the Middle East Peace Process has never fully recovered. The notion of a two-state solution envisaged by the international community has since faded away. The hopes and growing assertiveness of civil societies demanding political change through several protest movements that have swept across the region since 2011 were violently dashed in Egypt, Syria, and Libya.

Europe’s past ambitions fizzled out in the face of this landscape. Twenty-five years after Barcelona, it finds itself unable to de-escalate tensions

between its very own EU members and Turkey, a member of the NATO alliance. Against the backdrop of dramatic geopolitical changes in the Mediterranean region and glaring contrasts between hope and conflict, Europe’s role shows one constant that feels like a *déjà-vu*: the persisting divergence of European views concerning the Mediterranean. This essay will offer an analysis of Europe’s struggle to assert itself in the Mediterranean space and an attempt at mapping potential future developments in light of the progressive downscaling of the Euro-Mediterranean Partnership.

€106 billion

Annual average worth of Mediterranean countries’ import from the EU



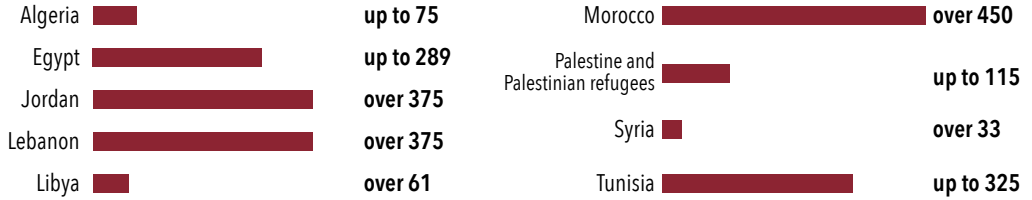
EU AMBITION VERSUS REALITY

Europe and the Middle East and North Africa (MENA) went through huge changes since the Barcelona Declaration: from the deterioration of the Middle East Peace process to the 9/11 terrorist attacks and the ensuing US-led military interventions in the broader Middle East, which upended regional stability. This long period of destabilisation, followed by progressive US disengagement under President Obama and radical revisionism during the Trump presidency, provoked the rise of many actors in Mediterranean geopolitics, including Russia’s role in Syria, Libya and parts of Mediterranean Europe, China’s economic penetration in the whole area, the Gulf states increasing their reach, Turkey’s aggressive gambles to become a regional player, and grow-

EU AID TO THE SOUTHERN SHORE

EU support to individual countries in its Southern Neighbourhood as a response to the COVID-19 pandemic

data in million euro



EU BILATERAL COOPERATION WITH THE SOUTHERN NEIGHBOURHOOD

Financial allocations under the European Neighbourhood Instrument (ENI)
for the implementation of the European Neighbourhood Policy (ENP)

Country	Period	Allocations	Sectors
Algeria	2018-2020	€125 million	Economic governance; territorial development and democracy; energy and environment
Egypt	2017-2020	€432-528 million	Economic modernisation, sustainability, environment; social development; governance and democracy
Israel	Annual	€1.8 million (twinning projects)	Education, telecommunication and waste management
Jordan	2014-2020	€914 million	Socio-economic development; rule of law; border management and counter-extremism
Lebanon	2017-2020	€186.5 million-€227.9 million	Growth and job creation; socio-economic development; rule of law and security
Libya	2020	€98 million	Governance; economic development; health; civil society and youth
Morocco	2014-2020	Between €1.3 and €1.6 billion	Access to social services; democratic governance, rule of law and mobility; employment and growth; civil society
Palestine	2017-2020	€1.28 billion	Governance reform and fiscal consolidation; rule of law, justice and human rights; service delivery; water and energy; sustainable development
Syria	Since 2011	€349.4 million	Transition and post-conflict recovery; assistance in the fields of education, support to livelihoods, civil society capacity building, health, accountability and transitional justice
Tunisia	2017-2020	€300 million per year	Good governance and rule of law; sustainable economic growth; social cohesion

Data: European Commission (July 2020); European Neighbourhood Policy and Enlargement Negotiations

ing tensions between Iran on one side, and Saudi Arabia and Israel on the other.

There is no shortage of challenges facing Europe's policies toward its South either. The model of governance in the MENA region which Europe had de facto supported by propping up authoritarian states through trade and aid collapsed under the dual force of the economic crisis and the

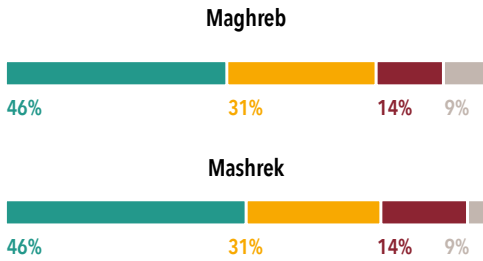
Arab Spring. The former had repercussions on Europe's ability to use macro-economic instruments to back up the stagnant economies in North Africa and the Middle East, where non-energy exporting countries rely heavily on trade flows, European investments, and tourism. The latter brought to the fore the unsustainability of corrupt governments without political participation.

THE PERCEPTION OF THE EU IN ITS SOUTHERN NEIGHBOURHOOD

Face-to-face interviews conducted in the Mashrek and in the Maghreb in 2019

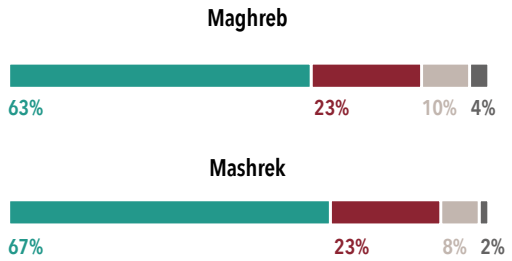
Do you have a positive, neutral or negative image of the European Union?

Very or fairly positive Neutral Very or fairly negative Don't know



How would you describe the relation between the European Union and your country?

The EU does not have any relation with my country



Source: EU Neighbours

But the opportunity to rethink relationships across the Mediterranean was not seized. Europe's own weaknesses progressively brewed new problems, from the rise of populism and Brexit to the dramatic politicisation of migration policy. Europe's response to the inflow of refugees from the war zones of Syria, Afghanistan, and Iraq in 2015-2016 put a stop to any attempt to rethink relations with that region.

The story of the institutional architectures and initiatives that the EU proposed reflects this progressive deterioration of relations. The EMP in 1995 was later accompanied by the European Neighbourhood Policy (ENP) in 2004, designed to establish a set of deepening relations between the enlarging European Union (to Central Europe, Malta and Cyprus) and all its Southern and Eastern neighbours. The "vision thing" of both the EMP and the ENP remained rooted in peace, prosperity, and democracy, but as greater emphasis and resources were channelled toward these regions, the gap widened between ambition and reality, with unfulfilled goals, under or badly spent aid, and multiple obstacles to pursuing mutually agreed goals.

The ambition of EU policies towards the region continued to be downscaled in the following years. In 2009, following a French initiative, the Union for the Mediterranean (UfM) de facto took over the

role of the EMP and reduced it to a set of projects and initiatives of lesser political breadth. The Arab Spring then forced the EU to acknowledge its inability to offer economic incentives in exchange for political reform. But the "deep democracy"³ goal of the immediate response to the revolutions energising North Africa and the Middle East, with the exception of Tunisia, was lost in the wave of repression and the descent into violent conflict and war. The next round of policy reviews took place under the aegis of the European Neighbourhood Policy, but the EU strategic capacity was largely lost with the creation of the UfM. Realism prevailed in the next generation of the ENP, with the imagined Mediterranean space becoming one of bilateral relations and targeted goals for each individual country.⁴ The merging of past financial instruments into one global tool has put an end to any aspirations on a regional scale.

€7.5-9.2 billion

ENP allocation for the Southern Neighbourhood (2014-2020)



EUROPE'S FAILURES IN THE MEDITERRANEAN

Context, events, and policy implementation are not sufficient to explain Europe's failures in the

Mediterranean. The history of relations between individual European states and their counterparts in the Middle East and North Africa looms large in shaping national preferences. France, one of the most important players in the region, had embraced the Euro-Mediterranean Partnership because it facilitated a “healthy distancing from the colonial experience.”⁵ But later its support for the UfM reflected both a growing nationalisation of foreign policy within the EU and the interference of domestic politics in the foreign policy agenda.⁶ The Barcelona Declaration and the diplomatic efforts that led to it – with Spain, France and Italy all joining forces to shape the EU agenda – was an exceptional event. EU Member States, including those with similar regional exposure, had been hopelessly divided, each one willing to protect its special relations, such as Spain with Morocco, or France and Italy competing for influence in Libya. The lack of convergence among the geographical preferences of individual Member States and sectoral interests (security, migration, energy, history, trade, culture, human relationships) were behind the failed Europeanisation of the regional approach.

The Lisbon Treaty, which entered into force in 2010, did not deliver on some expectations of beefing up Europe’s unity on foreign policy. The creation of the European External Action Service (EEAS) and double-hatting the High Representative for Foreign Affairs and Security Policy as Vice-President of the European Commission did not bring about that marriage between forging political consensus and mobilising the many instruments at the Commission’s disposal (which indeed were the toolbox of the EMP). Decision-making was elevated to the European Council which, instead of providing strategic guidance as the Treaty expected, ended up dealing with crisis management at the expense of the foreign ministers, no longer present in the room. In the face of lacklustre EU responses to the events of 2020 – from multiple and rising tensions in the East Mediterranean, to continued conflict in Libya and Syria – all the efforts at upgrading Europe’s foreign policy system indeed seem to have been of limited effect.

For the Mediterranean region, in 2015-16 the flows of migrants and refugees became a major trauma, underscoring how diversely exposed EU

Member States are to mobility across the Mediterranean and the differences between national immigration policies and attitudes. The depth of the European crisis as a consequence of the flight of refugees from Middle Eastern warzones has exposed the nexus between domestic politics and foreign policy like few other crises. It has since proven impossible to move towards a common understanding of the challenge. Cooperation with Turkey on Syrian refugees has emboldened Ankara’s activism in the Mediterranean and stifled European responses.

>€2.2 billion

European Commission’s support for its Southern Neighbourhood during the pandemic



EUROPE IN SEARCH OF A SUCCESSFUL APPROACH

Seen through the lens of foreign policy, there is little hope that the EU can forge an initiative that will echo the lofty goals or even the spirit of the Barcelona Process. The current international and regional contexts are not favourable, and Europe is not displaying the necessary political will, imagination, or wherewithal. Most of the critical areas of dysfunction in the Mediterranean region – conflict, security, migration, changing regional balance of power and alliances, the rise of other actors – are all politically controversial for EU Member States.

Other approaches may be more successful in bringing about some new momentum in relations across the two shores. In 2021, the objectives of the new financial envelopes available for the Middle East and North Africa will be decided. The buzzwords around external assistance are well-known: resilience, digital, green. The EU has also been supportive in dealing with the COVID-19 pandemic, mobilising international finance and humanitarian aid for its neighbours.

The geopolitics of the coronavirus and the US-China rivalry have also promoted a new critique of Europe’s international relationships. Coupled with a growing European attention towards the African continent, the south Mediterranean could find itself at the centre of a different geography as European attention shifts away from the West-to-East axis to focus on the global North-to-South one.

Russia's uneasy role in the broader Mediterranean

Andrey Kortunov

Director General, Russian International Affairs Council (RIAC)

Since its initial intervention in Syria in September 2015, Russia has become one of the most active and influential external players in the Eastern Mediterranean. Today, the Russian presence is taken into account almost everywhere across the region – from Turkey to Egypt and from Greece to Algeria. With a relatively low price paid in blood and treasure, Moscow has emerged as a critical power broker in both the Syrian and the Libyan conflicts. According to many experts, Vladimir Putin can now claim a major success for his engagement strategy in the broader Mediterranean, especially in comparison with the somewhat inconsistent, reactive and situational Western policies in the region.

NEW OPPORTUNITIES AND CHALLENGES OF 2020

The global “perfect storm” of 2020 offered Moscow additional opportunities to consolidate its earlier gains in the Mediterranean. The unprecedented COVID-19 pandemic and one of the deepest economic recessions in modern history made Western societies and governments more inward-looking and less interested in any long-term foreign policy investments, and even less so in any direct military participation to regional conflicts in the Middle East and North Africa (MENA). The distracting impact of both the presidential election in the United States and the multiple in-house challenges faced by the European Union broadened the power vacuum in the MENA region and made it easier for Russia to continue punching above its weight on the regional geopolitical scene. However, the year 2020 also generated a number of new challenges

to Russia's presence in the Mediterranean. First, the economic crisis and the implosion of global oil prices resulted in a rapid deterioration of Moscow's budgetary situation. The current Russian engagement in the MENA region is a relatively low-cost enterprise, but under the new circumstances, even these expenses might appear excessive, albeit still affordable. Second, in the middle of the crisis the public in Russia, as in any other country, has been more focused on burning domestic social and economic issues than on dubious foreign policy victories and military muscle flexing exercises. It has become harder for the Kremlin to justify a protracted Russian presence in Syria or the murky role that Russia plays in Libya in the eyes of its society.

\$500 million

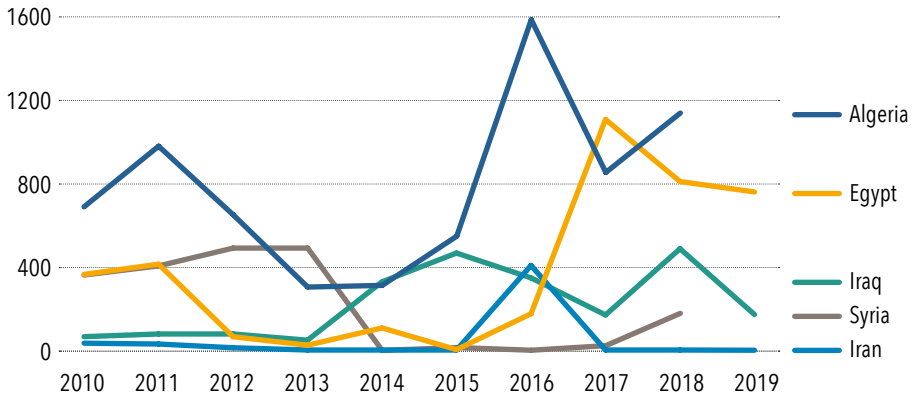
Russian investment in the Syrian port of Tartous (2019)



In 2020 the MENA region has continued to produce new risks and threats for established Russian patterns of behaviour. So far, COVID-19 has not hit the MENA countries as hard as it has Europe or North America. However, the potential for a much larger epidemic is there, especially in light of the many instances of dismal social infrastructures, inadequate essential medical care, limited access to international humanitarian assistance and so on. Russian military power is not likely to be an efficient remedy to the pandemic, so Moscow might have to look for new international partners with appropriate capacities. In a more general sense, the pandemic and low oil prices might lead to more economic and social

RUSSIAN ARMS IN THE MENA REGION

Trend Indicator Value (TIV) of arms exports from Russia to MENA countries (2010-2019)



Data: SIPRI

instability in the MENA region that could prevail over Russia's commitment to shoulder regional authoritarian regimes.

The US-brokered diplomatic reconciliation between Israel and a number of Arab Gulf states is yet another challenge to Russia. Though Moscow officially welcomed the deal, there are concerns about the US getting back to the Middle Eastern stage with an explicitly pro-Israeli agenda. Any balanced Israeli-Palestinian settlement seems to be out of reach now. Moreover, in relative terms, the value of Russia as an Israeli partner has diminished. On the other hand, Israel's boosted self-confidence (bordering on arrogance) makes Moscow's balancing policies more problematic than ever before.

In the beginning of 2020, the US-Iranian confrontation climaxed with the assassination of General Qasem Soleimani. This US operation wiped away even the slimmest prospect of a limited rapprochement between Washington and Tehran. This led to stronger pressure from Tehran on Moscow to provide greater political and military support to Iran in its renewed confrontation with the United States, Saudi Arabia, the United Arab Emirates and Israel, which Moscow found hard to do. On top of that, Iran has made a couple of demonstrative steps away from the JCPOA. All this inevitably makes Moscow's partnership with Tehran more difficult than ever before.

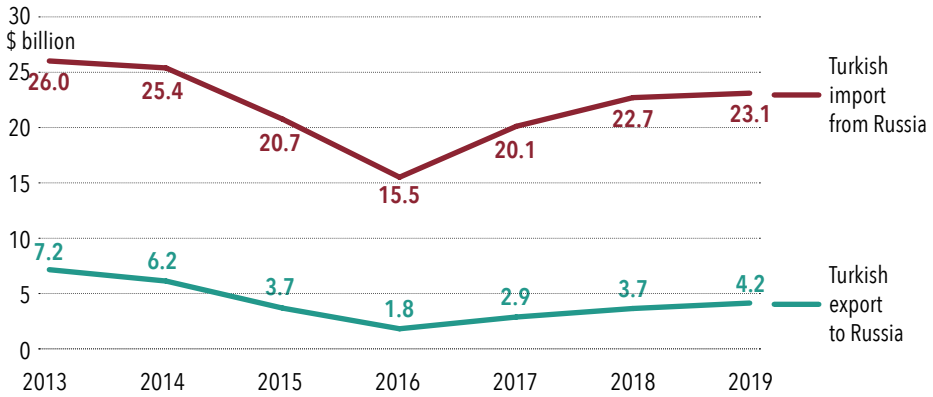
TURKEY: A PARTNER AND AN ADVERSARY

However, these days the most formidable challenge to Russia's policy in the Mediterranean comes from Turkey. Russia and Turkey are at the same time geopolitical companions and competitors. In some cases, they are even direct opponents. Putin and Erdoğan have always maintained rather cautious relations, although, in general, both tend to be wary of any foreign partner. The periodic frictions, disputes and misunderstandings between Moscow and Ankara have been actively exploited by third countries, many of which have no interest in the on-off interaction between Russia and Turkey turning into a strategic partnership. There are many disputed issues between the two sides beyond the Mediterranean – including the war in Nagorno-Karabakh, the expansion of Turkish military cooperation with Ukraine, Moscow's fear of an aggressive promotion of Pan-Turkism in Russia proper, etc. – but the sources of disagreement in the broader Mediterranean area certainly abound.

Turkey has been one of the main foreign actors in the Libyan civil war since the very beginning. Turkish military assistance prevented Marshal Khalifa Haftar from capturing Tripoli. If Ankara continues to internationalise the Libyan conflict by building up its own military presence in the country, expecting Fayeze al-Sarraj's forces to achieve a decisive victory over his many oppo-

FROM MOSCOW TO ANKARA, FROM ANKARA TO MOSCOW

Bilateral trade relations between Turkey and Russia (2013-2019)



Data: Turkish Statistical Institute (Turkstat)

nents in the eastern and southern Libyan regions, then it will face increasingly serious problems with Moscow.

Syria contains many more risks for the Russian-Turkish partnership, most notably concerning Idlib. Turkey's obligations under the Sochi agreements on Idlib were to ensure the withdrawal of terrorist groups and heavy arms from the buffer zone. Two years later, Ankara has failed to keep its end of the deal. Any hopes that Turkey would be able to somehow "rehabilitate" or at least "restrain" Islamic fundamentalists in Idlib dissipated early on. If the terrorists, buffered by the Turkish presence in Idlib, use this territory as a base for launching active operations against Bashar al-Assad's forces and the Russian military infrastructure in Syria, then it is only a matter of time until a new crisis between Russia and Turkey breaks out.

Unsurprisingly, Russia and Turkey have different attitudes towards the Syrian Kurds and the role they would like to see them play in the country's future. Thus far, Ankara and Moscow have managed to avoid problems on this issue by "agreeing to disagree." However, if Turkey launches a new large-scale operation against the Kurds in northern Syria, this will inevitably lead to the Kurds forming an alliance with the Syrian government, which Moscow would no doubt support (and perhaps even encourage). This could

result in a direct clash between Damascus and Ankara in northern Syria, with all the negative consequences this would entail for Russia-Turkey relations. Russia's deteriorating relations with Greece are also a source of concern. However, it is extremely unlikely that Moscow would take Ankara's side in Turkey's current territorial dispute with Greece. All the more so because, in the present situation regarding the delimitation of exclusive economic zones in the Mediterranean, Turkey is pitted not only against Greece but also against virtually all of Russia's partners and friends in the Eastern Mediterranean. The "Greek issue," compounded by Turkey's activity in Libya (which makes Moscow uneasy), could trigger a new crisis in Russia-Turkey relations.

RUSSIA'S EVOLVING STANCE

There is little doubt that since the beginning of its intervention in Syria, Russia has accumulated a lot of experience in the broader Mediterranean. The question about how steep the learning curve has been remains open. However, one can already make some preliminary conclusions about the overall evolution of the Russian stance based on a comparative analysis of what the Kremlin is doing in Syria and in Libya respectively.

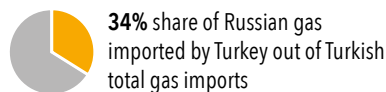
First, the goal of Russia's engagement in Syria is gaining control, which is not the case in Libya. Moscow's investments in Syria are long-term and

GAS STREAMS

Pipelines delivering Russian natural gas to Turkey



Source: Gazprom



TurkStream	Blue Stream
Length	1,213 km
over 930 km	
Design capacity	16 billion m ³ /year
31.5 billion m ³ /year	
Date of first gas supply	2003
January 2020	

strategic, while its investments in Libya are short-term and opportunistic. The Russian military presence in Syria makes Moscow responsible for the country, but this does not apply to Libya. It is unlikely that the Kremlin is looking for any permanent military bases or other forms of military presence in Libya. This means that it can withdraw at any point without paying a high political price.

Second, Moscow is very clear about its side in the Syrian conflict. In very many ways, the tail is wagging the dog while Moscow remains chained to the Assad regime. However, if Russia's leverage over Damascus might be significant, Assad's leverage over Moscow should not be underestimated either. In Libya, the name of the game is not "assisting the legitimate government", but rather maintaining the right balance between local players. If needed, Moscow can tip its support towards either Tripoli or Tobruk without making any final choice between the two.

Third, Russian interests behind the engagement in Syria are primarily geopolitical. Of course, Moscow would like to get some economic return on its military and political investment in this country, but this goal does not look realistic: Syria is poor and the US and EU economic sanctions against Assad's regime make Syria a very unattractive place even for state-owned Russian corporations. In Libya, economic interests take precedence instead. The country is rich and nu-

merous Russian businesses – from defence manufacturers to the energy sector to transportation companies – are looking for a piece of the sweet Libyan cake.

Fourth, in Syria Russia operates mostly on the official level, through a formal agreement between Moscow and Damascus. The Russian Ministry of Defence is by far the most important instrument in Russian operations. In Libya, there is a peculiar form of "private-public partnership" in place, with private military companies taking the lead. This mode of engagement allows Moscow to demonstrate more flexibility, to avoid taking responsibility for specific developments on the ground and to bring the costs of its engagement down.

\$65.1 billion

Russian military expenditure, corresponding to 3.9% of GDP (2019)



Speculating about Russia's future engagements in the broader Mediterranean as well as in other conflict situations, one can predict that the "Libyan model" will be more usable than the "Syrian model". However, a potential rapprochement with the West might still change this scenario, making the Kremlin more receptive to multilateral or coordinated actions with other external players than it is today.

The COVID-19 pandemic and China's Middle East gains

Jonathan Fulton

Jonathan Fulton, Assistant Professor of Political Science at Zayed University, Abu Dhabi (UAE), and Senior Non-resident Fellow at The Atlantic Council

In many parts of the world, China has suffered reputational costs since the COVID-19 crisis hit.

The run-up to the US general election has had a significant focus on China, with both Republicans and Democrats promising to be tough on China, while President Donald Trump has blamed what he undiplomatically referred to as the “Wuhan virus” for his lacklustre polling numbers and, by extension, China for a weakened US economy. Europe has seen a dramatic shift in the perception of China, with recent survey data indicating that the view of China held by many Europeans has worsened during the coronavirus crisis.¹ Canada, Australia and New Zealand, all of which are at a low point in their bilateral relations with China, have also been taking tougher stances with Beijing. Most alarming was a June battle between Indian and Chinese troops in the Galwan Valley in which twenty Indian soldiers and an undisclosed number of Chinese were killed.

The Middle East, however, has been an exception. Across the region, China's influence has continued its steady rise as its interests diversify and grow. Regional leaders have largely spoken of China in positive terms, and while there may have been quiet resentment about how Beijing handled the early outbreak of the virus, it was not given the same level of public expression as it has elsewhere.

Since the start of the pandemic, China's position in the Middle East appears to have actually become stronger. Chinese outreach into the region is being welcomed, especially as it has offered support in addressing the COVID-19 crisis. The increased engagement may also be be-

cause Middle Eastern leaders are keeping an eye on economic recovery in the post-coronavirus period. Indeed, Chinese trade and investment have been central to its growing presence, and its Belt and Road Initiative (BRI) ambitions for the region are likely seen as an important element of future economic stimulus and growth. That this is taking place within the context of increased US-China competition is an important consideration; the Middle East features several American allies and partners, and as tensions between Washington and Beijing rise, there is potential for that strategic competition to spill over into the region.

\$3 million

Value of medical supplies donated by Kuwait to China in March 2020



THE COVID-19 RESPONSE

When the coronavirus pandemic broke out in China, several Middle Eastern countries were quick to respond with material aid as well as rhetorical and symbolic expressions of support, all of which was appreciated in Beijing.² With much greater wealth and deeper relations with China, the Gulf states stood out as especially generous. Qatar Airways delivered five cargo freighters worth of medical supplies³ and Saudi Arabia's King Salman Humanitarian Aid and Relief Centre teamed up with several Saudi companies to provide a substantial donation of medical equipment and personal protective equipment (PPE).⁴ Kuwait donated \$3 million worth of medical supplies,⁵ and the United Arab Emirates (UAE)'s contribution

was considered significant enough to merit being officially listed among a small group of countries that offered “sincere and friendly understanding, support and help.”⁶ The Gulf was not the only regional source of support, however; other MENA states including Israel, Egypt, Turkey and Iran also contributed, and Chinese government officials were effusive in expressing their thanks.⁷

When the pandemic started to affect Middle Eastern countries, China had apparently gotten past the worst of its own COVID-19 experience and was prepared to switch roles from aid recipient to donor. Chinese government and public health experts held online seminars with their MENA counterparts, providing advice gained through their experience of testing, tracing, and treating the virus. Material aid from China also flowed into the region, with PPE and testing kits. Chinese state-owned enterprises and multinational companies helped construct COVID hospitals in Dubai and Kuwait.

One major Chinese company that came to the forefront in the Middle East as a result of the pandemic was Shenzhen-based BGI Genomics Co, an artificial intelligence company referred to as the “Huawei of genomics.”⁸ In March, a partnership with Abu Dhabi’s Group 42 (G42) was made public, and it quickly became the central pillar in the UAE’s testing programme; by early September its government had performed over 7.5 million tests against a population of approximately 10 million.⁹ It also signed an agreement with Israel under which it carries out over 20,000 tests per day.¹⁰ Shortly after, BGI appeared in Saudi Arabia, with the announcement of a \$265 million deal to supply the Kingdom with 9 million test kits, 500 specialist technicians and six test laboratories, as well as training for Saudi staff. The deal enabled Saudi Arabia to conduct up to 60,000 tests per day.¹¹

Vaccine development is the next stage of the response to the coronavirus and China has been active on this front in the Middle East as well. The UAE and Israel both announced in June that they had signed cooperation agreements with China’s Sinopharm to participate in its phase III clinical trials of a vaccine.¹² Bahrain later joined the Sinopharm trials in August.¹³ Saudi Arabia has also partnered with a Chinese pharmaceutical, CanSino Biologics, in its own trial.¹⁴

A TOP EXPORTER

Ranking of China as Import/Export Partner, 2019






	Import Ranking ▼	Export Ranking ▲
Algeria	1	No data available
Bahrain	1	4
Egypt	1	20
Iran	1	1
Iraq	2	1
Israel	3	3
Jordan	2	8
Kuwait	1	3
Lebanon	1	10
Libya	1	2
Morocco	3	17
Oman	3	1
Qatar	2	4
Saudi Arabia	1	1
Syria	2	36
Tunisia	3	31
Turkey	3	18
UAE	1	4
Yemen	2	10

Data: International Monetary Fund,
Direction of Trade Statistics

For China, the motivation to partner with these countries is part of its global rebranding efforts to establish itself as a responsible global power. In specifically working with Middle Eastern countries, however, it is strengthening relations with states within a region that it considers vital to its long-term interests. While MENA states have been less forthcoming about their own motivations to partner with China, presumably there are several considerations beyond early access to a vaccine. First and foremost, it would appear that China’s relative success in dealing with the pan-

CHINESE AID IN TIMES OF COVID-19

Breakdown of aid China has sent to MENA countries during the first months of the pandemic*

	 Medical supplies (such as masks, gloves or testing kits)	 Medical teams	 Medical structures	 Financial donations	 Information and training
Algeria	✓	✓			
Egypt	✓				
Saudi Arabia	✓	✓	✓		✓
Iran	✓		✓	✓	
UAE			✓		✓
Iraq	✓	✓			
Morocco	✓				
Qatar	✓				
Jordan	✓				
Kuwait	✓	✓	✓		
Oman	✓			✓	
Turkey	✓			✓	
Israel	✓				✓
Bahrain					
Palestine	✓	✓			✓
Libya	✓	✓			
Syria	✓				
Lebanon	✓				✓
Yemen	✓				

*The list is not intended to be exhaustive

Source: KAS (July 2020) and information collected by the author

demic as well as its support in the earlier stage of testing and treatment has generated a degree of trust. The UAE made this point explicit; a spokesperson from its Ministry of Foreign Affairs said the Emirates wants to work “with the best companies in the world, especially in light of the current crisis, which requires cooperation across countries and sectors.”¹⁵

Another important consideration is how China may fit into their short and near-term economic planning. There will be intense economic pressure everywhere when the immediate public health consequences of the coronavirus begin to

fade, but several Chinese partners in the Middle East will be especially vulnerable economically. This is all the more glaring given the problems facing states that are heavily reliant on energy exports to fund their government budgets. A massive decline in oil export revenue throughout 2020 has hit the Gulf monarchies especially hard, making a reignited Chinese economy a potentially important driver of their own recoveries.

Beyond energy, China is the largest trade partner for several MENA countries. In 2019 it was among the top five export markets for ten countries in the region and ranked among the

top three sources of imports for every country in the Middle East (see table on page 23). A return to something resembling pre-coronavirus levels of trade with China would be important for the region. Chinese investment will also be crucial. By 2016 it had become the largest extra-regional source of foreign direct investment, and Middle Eastern governments could be looking for a return of Chinese investment into projects to kick-start their economies.¹⁶ Clearly, economic issues are a motivating factor for deeper cooperation with China.

PRESSURES FROM BEYOND

At the same time, however, their relationships with the US will also bear watching. China-US relations have entered an especially fraught period, with each side considering the other its biggest strategic competitor. China has long maintained a difficult balance in the Middle East, developing strong relations across the region while focusing largely on economic sectors that do not challenge US interests or preponderance.¹⁷ Its BRI cooperation priorities and Arab Policy Paper are blueprints for deeper engagement without disrupting a delicate ecosystem.¹⁸ In its arms sales, for example, China largely provides systems like armed drones that the US cannot trade because of congressional restrictions. Its security presence in the Middle East is minimal despite its substantial regional interests; this too is likely out of a need to avoid antagonising the US or putting pressure on its existing alliances.

This approach is coming under pressure from the Trump administration, however, as it perceives Chinese involvement in certain sectors that China has been developing – mainly 5G technology and nuclear energy – as potentially disruptive. US officials have been asserting leverage on regional allies and partners in recent months, cautioning them to stop cooperating with China in areas with security risks, with one official stating a preference for “reduction of entanglements overall.

Elimination in critical areas altogether.”¹⁹ Another US official in the UAE claimed that by working closely with Chinese firms on 5G networks “they risk rupturing the long-term strategic relationship they have with the US.”²⁰ It appears that this risk perception from Washington has expanded to include cooperation with BGI, as American officials warn their Middle Eastern counterparts that the data the company collects through its testing could have intelligence value.²¹ Treating the pandemic has thus been securitised.

\$265 million

Value of China-Saudi deal for medical cooperation



All in all, China’s presence in the Middle East has deepened as a result of its coronavirus diplomacy. Despite US concerns and pressure, its own dismal track record in handling the pandemic provides little leverage in this regard. Middle Eastern countries are in the uncomfortable position of having to balance their deep ties with the US against their interests with China. In this regard they are not alone – Singapore’s Prime Minister Lee Hsien Loong recently published an article about the same problem from an Asian perspective, writing that Asian leaders “fervently hope not to be forced to choose between the United States and China.”²² Washington might be using a Cold War playbook in confronting China, but other countries are more interested in solving immediate developmental and economic problems than in great power competition.

Going forward, we can expect to see China continuing to focus on the COVID-19 response as a pillar of strengthening relations with Middle Eastern countries. It is one area where, for now, the US cannot offer a credible alternative. As this cooperation in public health and economic growth continues, it is likely that China will come out of the health crisis in a much stronger position in the Middle East.

Defusing US-Iran tensions and building security in the Gulf: a roadmap

Annalisa Perteghella

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Much ink has been spilled, and not without a reason, about the need for a regional security architecture for the Persian Gulf region. A most cited example offered as a model for building a new regional order is that of the Conference on Security and Cooperation in Europe (CSCE), which led to the Helsinki Final Act and then to the establishment of the Organization for Security and Cooperation in Europe (OSCE). If that kind of dialogue was functional to achieving long-lasting peace among countries sitting on opposing sides of the Cold War, the reasoning goes, it could prove useful also for building confidence and lowering tensions among countries sitting on opposing sides of the Gulf. On paper, there is nothing wrong with this reasoning, and yet, in reality, the effort of working towards an OSCE for the Gulf could prove too ambitious for a region and an epoch that eschew the linearity and straightforwardness of the Cold War order. However, the idea of offering rival countries a permanent channel of communication and a normative code of conduct should be the basis for a roadmap to building a new regional order.

THE ROAD TO DE-ESCALATION

The first and most urgent step in such a roadmap should be de-escalation. Over the last year, attacks on oil tankers as well as critical infrastructures, the US killing of general Qassem Soleimani and Abu Mahdi al-Muhandis, deputy head of the Iran-backed paramilitary forces in Iraq, and the subsequent increase in US-Iranian skirmishes in Iraq, have brought the region dangerously close to the point of no return and on the verge

of a major conflict. Thus, de-escalating tensions is crucial to prepare the terrain for bolder and more incisive measures. In order to de-escalate, the reopening of a backchannel between Iran and the US is essential. Such backchannel dialogue should have the nuclear issues at its centre, and the freezing of Tehran's nuclear activities as the main objective, as Iran's breakout time is now estimated in 3-6 months (it was 2-4 months before the Joint Comprehensive Plan of Action - JCPOA, and 12 months with the JCPOA in full operation). However, in order for Tehran to return to full compliance with the JCPOA, sanctions relief is needed.

38.7%

Fall of Iranian GDP generated by the oil sector in 2019/20



Consequently, the objective of this first phase should be to reach an interim arrangement freezing Tehran's nuclear activities in exchange for partial sanctions relief, in particular the lifting of sanctions on oil exports. Giving back to Iran the possibility to export its oil – even in a time of low prices – could in fact contribute to reinstating maritime security and freedom of navigation in the Gulf, as many of Iran's disruptive actions in the area stem from the impossibility to fully exercise its sovereign rights in the region. The French plan put forward in August 2019 could serve as a basis for such an arrangement. According to President Macron's plan, Tehran would need to agree that "Iran will never acquire nuclear weapons" and will "fully comply with its nuclear obligations and commitments and will accept a negotiation

A GEOPOLITICAL HOTSPOT

The strait of Hormuz and the recent escalating tensions



Source: ICIS

on a long-term framework for its nuclear activities." It would also "refrain from any aggression and will seek genuine peace and respect in the region through negotiations".¹ In exchange, the United States would agree to "lift all the sanctions re-imposed since 2017" and "Iran will have full ability to export its oil and freely use its revenues". Reaching such an arrangement before Iran's presidential elections, scheduled for June 2021, will be key to boost the pragmatic camp's possibilities of winning the election vis-à-vis the hardliners' camp.

FOSTERING REGIONAL DIALOGUE TO OVERCOME THE SENSE OF INSECURITY

The second, and more ambitious, step should be the launch of regional dialogue aimed at agreeing on a broader framework for cooperation between Iran and the Gulf monarchies. The objective of this dialogue should be to acknowledge every regional state's security concerns, and to provide a platform for addressing them, in order

to defuse the security dilemma and to halt the armaments race and the reciprocal resort to offensive measures. The fate of the JCPOA, in fact, has shown that while the nuclear issue is the priority, it cannot be fully detached from other sources of concern with regard to Iran. Regional countries like Saudi Arabia and Israel have sabotaged the JCPOA over the last years because of a growing perception of insecurity vis-à-vis Iran's growing influence in the region. At the same time, Iran's

80%

Share of the Iranian economy hit by sanctions since 2018, according to a declaration of US Secretary of State Mike Pompeo

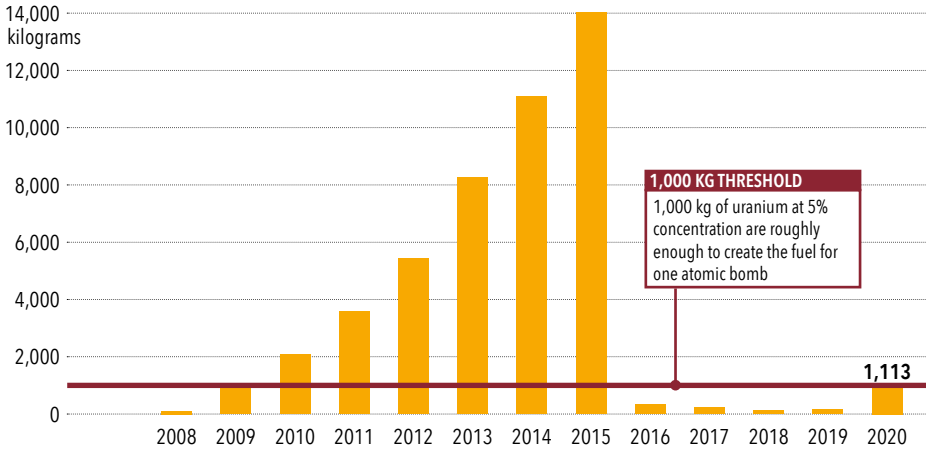


rise in the region, as well as its policy of support to proxies and allies, stems from Tehran's sense of strategic loneliness and isolation. Defusing such threat perceptions is therefore key to achieving meaningful dialogue and cooperation.

Such dialogue should be brokered by the US (the external actor more invested in regional se-

2020 IRAN BACK ON TRACK?

Iran's annual reserves of low-enriched uranium



Data: Institute for Science and International Security (New York Times elaboration)

curity), but should also include the EU, Russia and China as participant countries: only a united front composed of countries sitting as permanent members in the UN Security Council could be seen in the region as an incentive for agreeing to the dialogue. Otherwise, divisions and rivalries among these states could be exploited by countries in the region to earn benefits to the detriment of their rivals. It goes without saying that, for such a formula to succeed, the US should abandon the one-sided approach adopted over the last four years which unsurprisingly brought to the formalisation of security cooperation between Israel and Gulf countries such as the UAE and Bahrain. A return to the Obama-era approach of bringing Iran into regional discussions and fostering a balance-of-power system would be needed for such a project to succeed.

As for the agenda of the talks, it should include bold baskets such as agreeing on the principle of non-interference in each other's domestic affairs by the Gulf Arab states and Iran; regional conventional arms control arrangements; regional nuclear inspection regimes and shared international enrichment; regional and shared responses to transnational threats such as the COVID-19 pandemic, environmental and climate-related

threats. Of course, the approach should be gradual, and regional cooperation on the response to the coronavirus crisis can provide a springboard for cooperation on even trickier issues.

76%

Share of Iranians considering sanctions to be negative for their economic situation



CHALLENGES STANDING IN THE WAY OF COOPERATION

However, a set of challenges may disrupt the effort. First of all, there is no doubt that the regional balance of power today is strongly in favour of the Gulf Arab states/Israel axis, with Iran significantly contained by means of sanctions and US demonstrative actions such as the killing of general Qassem Soleimani. Iran's power, however, lies in asymmetric and covert actions and there is equally no doubt that US soldiers in the region, especially in Iraq, are now operating under an increasing level of threat, so much that rumours about the possible closing of the US embassy in Baghdad have started to circulate over the recent months. Gulf Arab states, too, have proven vulnerable to Iran's precision weapons. The threat would become significantly

greater should Iran continue on its current path and fully restore its nuclear activities, and in this case it is difficult to imagine any other solution than a preventive strike on nuclear installations, which, however, could precipitate the region into significant chaos.

Another challenge is linked to the recent passing of two regional leaders who had significantly invested in diplomacy in the course of their lives and tenures: the emir of Kuwait and the sultan of Oman. In both states, however, the new leaders have for now demonstrated a willingness to act in line with their predecessors, thus the role of Kuwait and Oman as regional pillars upon which building a new – more cooperative – order should be preserved.

A third challenge arises from the difficult moment in relations between great powers - namely the US and China, and the US and Russia - that makes it difficult to imagine a future cooperation on an issue as delicate as security in the Gulf. The three countries, however, share a common interest in stabilising in the region, therefore, as was the case with cooperation in the UN Security Council on Iran's nuclear program, they could be eager to work together to achieve a common goal.

Last but not least, a fourth challenge is represented by Iran's willingness and availability to actually go back to the JCPOA and to engage in discussions on other issues. While many of the principles on regional cooperation which could be included in a regional security initiative are contained in the HOPE initiative presented by Iranian president Hassan Rouhani at the UN Gen-

eral Assembly in September 2019, the June 2021 presidential elections in Iran risk elevating to the leadership of the country a candidate stemming from the more hardliner faction of Iran's political class. Indeed, hardliners and the military have already been significantly empowered by President Trump's "maximum pressure" campaign, and have in many cases hijacked Rouhani's political agenda. Domestic political evolution in Iran should thus be taken into account when crafting a regional strategy.

THE QUEST FOR DIPLOMATIC BALANCE

In conclusion, the balance of power in the Gulf region today rests upon a very fragile compromise: no state in the region, and no external backer, is willing to go to war. However, the level of tension is so high that war could in fact break out inadvertently, as a result of miscalculation, miscommunication or misinterpretation of each other's moves. In order to prevent such a result, it is imperative to de-escalate the current tensions and to work towards a more stable solution: a set of rules and agreed principles that certainly would not transform regional enemies into close allies, but that would significantly increase predictability and offer an avenue for clarification in case of disputes. In parallel, it is essential to kick-start a new diplomatic process for settling and regulating nuclear programs in the region: the priority is of course to freeze the Iranian nuclear program, but clear rules and protocols should be established and agreed upon by all states in the region, in order to prevent nuclear proliferation and a new regional arms race.

Turkey's assertiveness on the regional stage

Valeria Talbot

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Nowadays, Turkey stands as one of the most pro-active actors across the Middle East and North Africa (MENA).

From Syria to the Eastern Mediterranean and Libya, Ankara is playing an assertive role in the main regional conflicts and crises. While the ambition to become a dominant regional power has been a driver of the external action of the Justice and Development Party (AKP) ever since its rise to power in November 2002, over the years Turkish foreign policy has undergone major transformations. These have been the result not only of the progressive deterioration of the political situation in the country's neighbourhood – which has grown more and more unstable, fragmented and confrontational after the 2011 Arab uprisings – but also of changes of the security context and in the perception of threats in Turkey.

A MILITARISED FOREIGN POLICY

Against this backdrop, the AKP's foreign policy in the MENA region – which was originally based on a mix of soft power, diplomatic mediation and economic integration well summarised by the principle “zero problems with neighbours” – has become increasingly militarised and interventionist. The first hint of an upcoming change in Turkish foreign policy appeared in summer 2015, when Ankara intervened against both the Islamic State in Syria and Iraq and the bases of the outlawed Kurdistan Workers' Party (Pkk). The new course became evident in 2016, when Ankara launched its first military operation in northern Syria.

Aiming at extending its geopolitical influence in the Middle East and its surrounding regions, Turkey militarily engaged in regional crises that

have progressively turned into proxy wars due to the meddling of multiple regional actors involved into a fierce geopolitical competition to gain the upper hand in the area. In this framework, Turkey in partnership with Qatar contends with both Iran and its proxies, and with the aligned Saudi Arabia-United Arab Emirates front. However, while relations between Ankara and Tehran continue to follow the traditional dichotomy between competition and cooperation, choosing one over the other according to the interests at stake, tensions with Abu Dhabi and to a lesser extent with Riyadh have generated one additional fault line that makes the MENA region even more unstable and confrontational.

86%

Increase in Turkish military spending in the last decade



Furthermore, Turkish foreign policy also includes an important maritime component, summed up by the Blue Homeland (*Mavi Vatan*) doctrine,¹ for control of the Eastern Mediterranean, the Aegean and the Black Sea through military power projection. The pillars of this new maritime strategy are a more active role for the Turkish Navy in the national defence system and in the energy power struggle in the waters around Turkey, as well as the development of the national defence industry. As reported, in the last decade Turkish military spending has increased by 86%, to reach 20.4 billion in 2019.² However, Turkey's deteriorating economy calls into question the financial sustainability of its activism in foreign policy. Indeed, neither the country's economic fragil-

ity nor the coronavirus pandemic seem to have dampened Turkey's determination to pursue its external projection efforts so far. In this context, Ankara's foreign policy shift has also served as a tool to preserve the political leadership's standing in times of economic crisis in the country.

PLAYING MULTIPLE GAMES AT ONCE

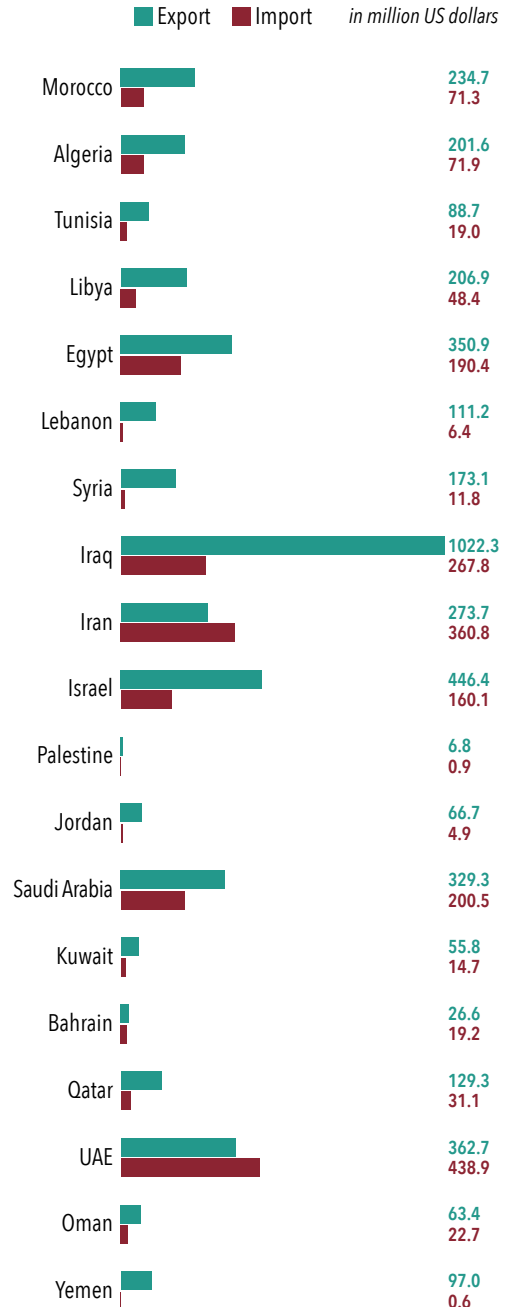
In order to assert its influence in a region where the balance of power is being redefined, Ankara has committed to playing on several different fronts. The war in Syria, the Libyan crisis, tensions in the Eastern Mediterranean and not least the conflict in the Nagorno-Karabakh, all represent the pieces of an ambitious and risky geopolitical agenda.

Syria

Geographic proximity, national security interests and perceptions of an existential threat undoubtedly make Syria the first priority for Turkey in the MENA region. In Syria, Ankara's main challenge is to have a say in future power arrangements as well as in the reconstruction of the country, where peace still seems a very distant goal. After backing the heterogeneous Syrian opposition front against the regime of Bashar al-Assad for years, in 2017 the Turkish government started cooperating with Russia and Iran within the Astana process, with the aim of finding a negotiated solution to the conflict. However, sitting at the negotiating table with Assad's two main supporters has not prevented Turkey from launching three military operations in the north of Syria in order to create a "safe zone", that is, a buffer area free from the presence of Kurdish militias along the southern Turkish border. The neutralisation of the Kurdish People's Protection Units (YPG), which Ankara considers a terrorist group affiliated to the PKK, is a main priority for Turkey both in Syria and in northern Iraq, where the organisation holds bases. The Turkish military presence in northern Syria as well as in the observation posts around the de-escalation zone of Idlib is bound to stay until Ankara manages to secure its interests. In the northern areas of the country, which were occupied by Turkish troops in 2016 with Operation Euphrates Shield, Ankara not only established a military presence but also started to manage local administrative affairs and to provide critical

TURKEY: A TRADE PARTNER FOR THE MENA REGION

Turkey export-import by country in the MENA region (2019)

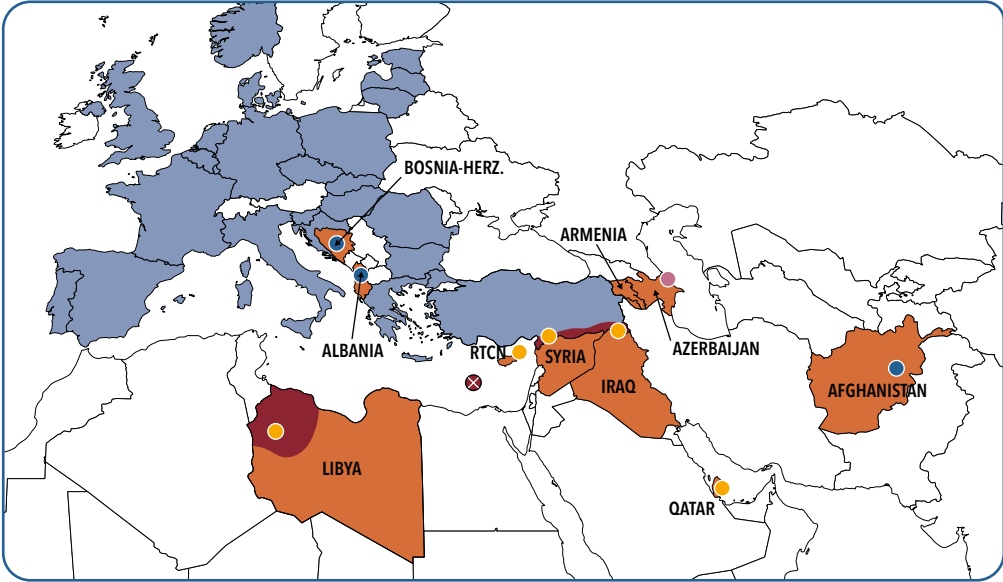


Data: Turkstat

TURKISH INTERVENTIONIST MILITARY POLICY

Turkish military presence in the MENA region (and beyond)

- Military presence (including military bases)
- ⊗ Military surveillance in the Mediterranean
- Involvement in NATO missions
- Reinforced military support
- NATO countries
- Conflict zones



Source: Le Monde

services to the population. The situation is more complex in Idlib, where the cease-fire negotiated by Ankara and Moscow in March 2020 left many issues unsolved, while the low-intensity conflict continues to rage.

Libya

Over the last year, Turkish foreign projection has spread considerably even far from its closest neighbourhood, Libya being the best case in point. Even if it is difficult to detect any direct threat coming from this North African country to Turkish national security, there are many Turkish interests at stake in Libya. The agreement on the definition of the respective areas of maritime jurisdiction signed in November 2019 with the Government of National Accord (GNA) of Fayez al-Sarraj, which also includes a clause on military cooperation, allows Turkey to extend its influence to North Africa, thus increasing its power projec-

tion in the Mediterranean basin. Turkey's deep involvement in the Libyan quagmire has led to a strategic reversal on the ground in favour of the GNA in its fight against the Libyan National Army (LNA) led by General Khalifa Haftar, who launched an offensive to conquer Tripoli in April 2019. By supplying weapons, armed drones, equipment, military training and Syrian militias as part of the agreement with the GNA and in violation of the UN arms embargo on Libya, Ankara has managed to carve out for itself one of the most influential roles in the Libyan crisis, while undermining the more consolidated positions of other players, such as Italy and other European countries.

As in Syria, Turkey's presence in Libya seems bound to grow stronger and to stay for the long haul. In this respect, Ankara is negotiating with the GNA to use two strategic outposts to control the western part of the country: al-Watiya airbase, which was regained last spring, and the

naval base of Misurata. Moreover, the trilateral protocol that Tripoli, Ankara and Doha signed last summer provides Turkey with a role in Libya's institution-building through the creation of a co-operation centre and the military training of GNA forces, with the ultimate goal of turning them into a regular army.

Beyond military cooperation, Turkey is greatly interested in resuming the multi-billion dollar projects that its construction firms had in place in Libya before the fall of Muammar Gaddafi's regime, as well as in gaining a significant share in the reconstruction of a hydrocarbons-rich country. A first step in this direction was taken in mid-August with the signature of a bilateral agreement which aims at solving the issue of the pending projects between the two countries, while also opening the way to new Turkish investments in Libya.

Eastern Mediterranean

Turkey's maritime activism transformed the Eastern Mediterranean into a new regional hotspot. By signing an agreement with al-Sarraj to redefine maritime borders and the respective exclusive economic zones (EEZ) in an area of the Mediterranean basin which is extremely strategic for energy cooperation, Ankara is not only disputing the delimitation of EEZs as defined by Cyprus and Greece according to the UN Convention on the Law of the Sea, but it is also questioning those energy cooperation projects that the other coastal countries launched without including Turkey.

By positioning itself as a maritime power, Turkey has intended to send an unequivocal message to other players, both regional and external alike, that also have a stake in the area: Ankara wants its say in regional affairs and particularly in gas production in this part of the Mediterranean. Aspiring to become an energy hub between hydrocarbons-rich areas and the European markets as well as to diversify its energy supplies, Ankara – which imports more than 90% of its energy needs – appeared ready to unhesitatingly challenge any initiative that fail to take Turkey into account or that may endanger its geostrategic interests. This was the case with the East Mediterranean Gas Forum (EMGF), created in 2018 by Cyprus, Egypt, Greece, Israel, Italy and the Palestinian National Authority, that a year later turned into an international organisation aimed at coordinating the

energy policies of its member states and creating a regional gas market. Furthermore, Turkey's energy explorations in the disputed waters around Cyprus and in the Aegean Sea, using warships to assert its maritime claims, produced an escalation of tensions with Nicosia, Athens and other European capitals, pushing the European Union (EU) to threaten economic sanctions against Ankara.

>90%

Share of Turkish energy imports to fulfill its energy needs



BEYOND THE MENA REGION

The recent conflict in Nagorno-Karabakh was seen by Ankara as an opportunity to extend its action beyond the Middle East. Drawing upon the tight cultural and linguistic connections as well as close economic, energy and military cooperation with Azerbaijan, Turkey did not hesitate to provide its unconditional support to Baku in the conflict against Armenia. While energy interests represent the backbone of this partnership – Azerbaijan is Turkey's second gas provider, whose market share has increased from 17% in 2017 to 21% in 2019, and to around 24% in the first semester of 2020³ – Turkey has also become one of Baku's first suppliers of weapons and military training. However, in spite of its strong military support on the battlefield, Turkey had a little say at the negotiating table that led to the ceasefire brokered by Russia, frustrating Ankara's ambitions to acquire more influence in the southern Caucasus.

24%

Azerbaijan's share in Turkish natural gas imports (2020, 1st semester)



Here, as in Libya and Syria, Turkey has to deal with Russia in the framework of a complex relation where competition and cooperation entwine. However, competing with Moscow in its strategic sphere of influence may be highly risky for Ankara. Similarly, Turkey's assertiveness may become overstretched, since it has already resulted in tense relations with the EU, its main economic partner, and more isolation in the region. Also in light of its deteriorating economy, Turkey's regional activism may face growing risks.

Syrian and Lebanese economy: a push for political compromise?

Lina Khatib

Director of the Middle East and North Africa Programme, Chatham House

If the decade leading up to 2020 had brought with it tough economic challenges for Lebanon and Syria, the year 2020 was the one to bring both countries to the brink of economic collapse. But the economic context in the two countries is intimately linked to domestic, regional and international political dynamics. The coming year is not likely to witness a significant shift in these dynamics, which signal continuation of the economic and political crises in Syria and Lebanon for the foreseeable future, at great cost to the average citizen. But in the long term, economic pressure can push for political compromise.

TWOFOLD CRISES

The year started with Syria suffering from significant economic decline. The Syria Living Conditions Index (LCI) estimated that between 2010 and 2019, the standard of living conditions in Syria decreased by 42%.¹ Economic estimates made in 2019 showed that at best, Syria would only likely regain its 2010 GDP level by 2030.² Lebanon also began the year with its currency having lost 80% of its value and with a deficit level of around 150% of its GDP. The coronavirus pandemic that took off in 2020 added to both countries' economic woes, as neither state had adequate social safety nets that would allow it to withstand the crisis. Many people in Lebanon and Syria who rely on daily wage found themselves losing their livelihoods as a result of imposed lockdowns. Governments did not offer compensation to businesses that had to shut down. And there was no economic strategy in either country to shore up the economy.

Instead, both countries witnessed political crises intimately linked to the economy. In Syria, a rift between President Bashar al-Assad and his cousin Rami Makhoul grew in scope and intensity. Assad used the framework of countering corruption to accuse Makhoul – a prominent businessman and a member of Assad's inner circle who had controlled almost 60% of Syria's economy – of tax evasion.³ Assad's government publicly demanded that Makhoul pay his dues, resulting in Makhoul publishing a series of bizarre videos in which he defended his position and presented himself as a victim. Syrians – especially those who had reportedly been coerced into paying a percentage of their revenues to Makhoul in his heyday as the regime's biggest crony – watched this unprecedented development as Assad and his wife took over many of Makhoul's assets. The latter's organization, al-Bustan, came to be under oversight from the first lady, and Makhoul also lost control over the lucrative SyriaTel telecommunications company. Assad's small inner circle of power was getting smaller.

2030

Estimated year when Syria's GDP might return to 2010 level



In Lebanon, the cabinet led by Saad Hariri had resigned in response to protests that began in October 2019, to be replaced with one led by Hassan Diab that was meant to be a technocratic government but that in reality was under Hezbollah control. The protests had caused a rift in Lebanon's elite power circle. Unlike Assad's circle, which is mainly based on familial relations linked

to the president, Lebanon's power circle contains figures from multiple political backgrounds who may compete with one another but who all ultimately have a stake in maintaining the country's status quo. The 2019 protests had pushed some of them, including Saad Hariri himself and members of the Lebanese Forces and Kataeb parties, to resign from the cabinet or parliament on the basis of siding with protester demands for accountability and reform. All sides saw Diab's cabinet as a temporary time-gaining measure while they tried to settle political scores in preparation for a comeback when a new cabinet is formed in 2020. With much intransigence on the part of Hezbollah and its allies regarding the composition of this new cabinet, when Diab's government resigned in 2020 in the aftermath of the Beirut Port explosion in August, Lebanon found itself with a political vacuum after which the same familiar faces were edging to get back into power. Lebanon's political circle was no more inclusive than before the 2019 protests.

DIFFERENT CRISES, SIMILAR AND INTERLINKED DYNAMICS

There are local dynamics that drove both countries to an economic brink. The irony in the case of Rami Makhoul is that he spoke about his support to the Syrian people in his posted videos at a time when he was one of the biggest winners of Assad's neo-liberal economic policies pre-2011. Those policies increased the wealth of regime cronies at the expense of the Syrian people. During the conflict in Syria, he expanded his business interests and military involvement to become one of Syria's major warlords. By the time Makhoul fell out of favour with Assad, 80% of Syrians were estimated by the UN to be below the poverty line. In Lebanon's case, decades of political elites in power syphoning off state assets to line their own and their cronies' pockets left the state practically bankrupt, leading Lebanon to default on its Eurobonds debt for the first time, have dwindling foreign currency reserves, and head in the direction of lifting subsidies on essential goods like wheat, fuel and medicine. And yet, in another irony, the country's ruling power elites continued to argue that they were the solution to Lebanon's problems. All this came as the World Bank estimated that 50% of Lebanese would be classified as in poverty by the end of 2020.

45 YEARS OF CRISIS

Timeline of the crisis in Lebanon



1975
Start of the civil war



1982
First Israel-Lebanon war
Israeli invasion of Lebanon



1990
End of the civil war



2000
Israeli withdrawal
from southern Lebanon



2005
Rafik Hariri's murder
Syrian withdrawal from Lebanon



2006
Second Israel-Lebanon war



October 2019
Popular protests



August 2020
Beirut blast

There are also links between the two countries' crises. As the economy in Syria deteriorated in 2019, Assad summoned regime cronies who had relied on Lebanese banks to safeguard their wealth – partly to circumvent international

> 200

Victims of Beirut blast
in August 2020



sanctions – to withdraw their money to pump it into Syria. This became one of the factors exacerbating the banking crisis in Lebanon. With the economic crisis in Lebanon leading banks to hold onto foreign currency by preventing depositors from accessing their money, those Syrian cronies

SYRIAN HUMANITARIAN CRISIS IN NUMBERS

The impact of the Syrian war on its population



-42%
drop in living conditions
in Syria from 2010 to 2019



9.3 million
Syrians are now food insecure – with an increase
of 1.4 million in the first six months of 2020



83%
of the Syrian population lives beyond
poverty line (less than \$1.9 per day)



11.7 million
people in need,
of whom:

- ● ● ● ● **5 million** are children
- ● ● ● ● **5 million** are in acute need
- **1.3 million** live with disabilities



6,495,000
number
of Syrian IDPs

Data: Syrian center for policy research; UN OCHA; Chatham House;
Internal displacement monitoring centre; WFP; Relief web

who had not withdrawn their cash from Lebanese banks found themselves stuck and unable to meet the regime's demands, thereby adding to Syria's economic woes. Hezbollah was also stealing some of the wheat and fuel subsidised by the Lebanese state to smuggle it across the border for sale in the Syrian market, and using the profits to fund its military operations in Syria. This left Lebanese citizens with a looming shortage in these essential goods. Lebanon is expected to run out of funds to subsidise those goods by the end of 2020, which would vastly increase the number of people classified as poor.

International factors play a role in the two countries' crises. While Assad blames Syria's economic problems on sanctions, the reality is that it is the regime and its cronies' behaviour, before the conflict and throughout its duration, which have pushed Syria in this direction, such as the many contracts brokered between the Syrian government and Russian companies granting them access to Syrian resources. US sanctions on Iran reduced Iran's funding to Hezbollah at a time when the group's intervention in Syria is carrying a significant cost, leading Hezbollah to become more reliant on acquiring Lebanese state resources to compensate for this reduced income. In both cases, the state is paying the price for the behaviour of those who hold the most power in the country and of their international patrons.

As such, even though the economic crises in Lebanon and Syria are not identical, they share some similarities and dynamics. The US maximum pressure strategy on Iran is playing out in both countries as more sanctions are imposed.

> **80%**

Loss of Lebanese
pound value in 2020



Such economic pressure is not yielding significant political concessions – Hezbollah in Lebanon remains defiant regarding its influence over the formation of the government, and Assad in Syria is preparing himself for re-election. But the maritime border talks between Lebanon and Israel are an indication of economic despair pushing for a political compromise. This may well be a sign of things to come in the far future.

THE ECONOMY AS A PUSH FACTOR FOR LONG-TERM POLITICAL CHANGE

With the EU and the US determined to adhere to their red lines about engaging with the Assad regime, and with the IMF insisting that Lebanon must reform its Central Bank and financial sector before any loan is given to the country, it does not look like either Syria or Lebanon is going to acquire a lifeline from the international community any time soon. This leaves their economic

LEBANESE ECONOMIC CRISIS IN NUMBERS

Lebanese macro poverty outlook indicators (April 2020)



GDP (2019)

US \$51.6 billion



Debt, % of GDP (2020)

178.2 (estimated)



Real GDP growth (2020, market prices)

-19.2% (estimated)



Real GDP growth per sector
(2020, constant factor prices)



agriculture

8.6%



Private consumption (2020)

-13.8% (estimated)



industry

-15.0%



Inflation (2020)

+70% (estimated)



services

-17.0%

Data: World Bank

prospects bleak, but also maintains the pressure on their leading political actors. Unfortunately for the average citizen in either country, this means having to pay the price for the political interests of those in power. While this is sadly not new, the price is now higher than ever for civilians and with no end in sight in the near future. This also underlines how intertwined domestic, regional and international dynamics are

in Lebanon and Syria, and how developments in each country cannot be completely isolated from those in the other. Ultimately, both regimes in Lebanon and Syria have de facto lost their sovereignty and become dependent on external actors for survival, and both countries seem destined to endure economic pressure as the lengthy route to achieving some political results in the long run.

A window of opportunity for an EU negotiated settlement in Libya

Matteo Colombo, Pan-European Junior Fellow, ECFR
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Arturo Varvelli, Head of Rome Office and Senior Policy Fellow, ECFR

Since early 2015, the peace negotiations between representatives of the Libyan institutions in Tripoli and Tobruk have continued irregularly as the fighting went on. These political initiatives have not resulted in a permanent ceasefire due to local spoilers refusing to commit to the peace process, national institutions lacking the power to impose their authority on controlled territories, and external governments interfering in internal affairs. The current political scenario opens a new window of opportunity to reach a permanent ceasefire, which could gradually lead to peace negotiations. On the internal front, on 23rd October Libya's warring sides signed an agreement on a permanent truce but the current balance of power prevents the two rivals from obtaining a total victory. On the international front, the states involved in the crisis committed to de-escalating violence at several international conferences.

CEASEFIRE AND NEGOTIATIONS. THE RISKY LIBYAN PATH TO A NATIONAL AGREEMENT

The current phase in Libya opens a window of opportunity for negotiations. The UN-recognised Tripoli-based Government of National Accord (GNA) and the Tobruk-based House of Representatives (HoR) reached an agreement for a ceasefire on 21st August, which is still holding. The two sides established a line of partition close to Sirte, which the Egyptian President Abdel Fattah al-Sisi indicated as the redline. In the following months, a new political environment emerged at both the internal and the external level.

Within the Libyan borders, individuals and political groups increasingly saw dialogue as a way to

promote themselves and secure their power positions. Furthermore, the end of fighting resulted in tensions exploding inside both the pro-GNA and pro-HoR coalitions. In the west, competition erupted among three key political leaders: Prime Minister Fayeze al-Sarraj, Deputy Ahmed Maiteeq, and Interior Minister Fathi Bashagha. Maiteeq bypassed Sarraj to reach an agreement with Khalid Haftar, son of the leader of the Libyan Arab Armed Forces (LAAF), Khalifa Haftar, to resume hydrocarbon extraction and export. Sarraj also engaged in a power struggle with Bashagha, who was briefly suspended from his ministerial position and then reintegrated in the wake of street protests against corruption and declining public services. Maiteeq

95%

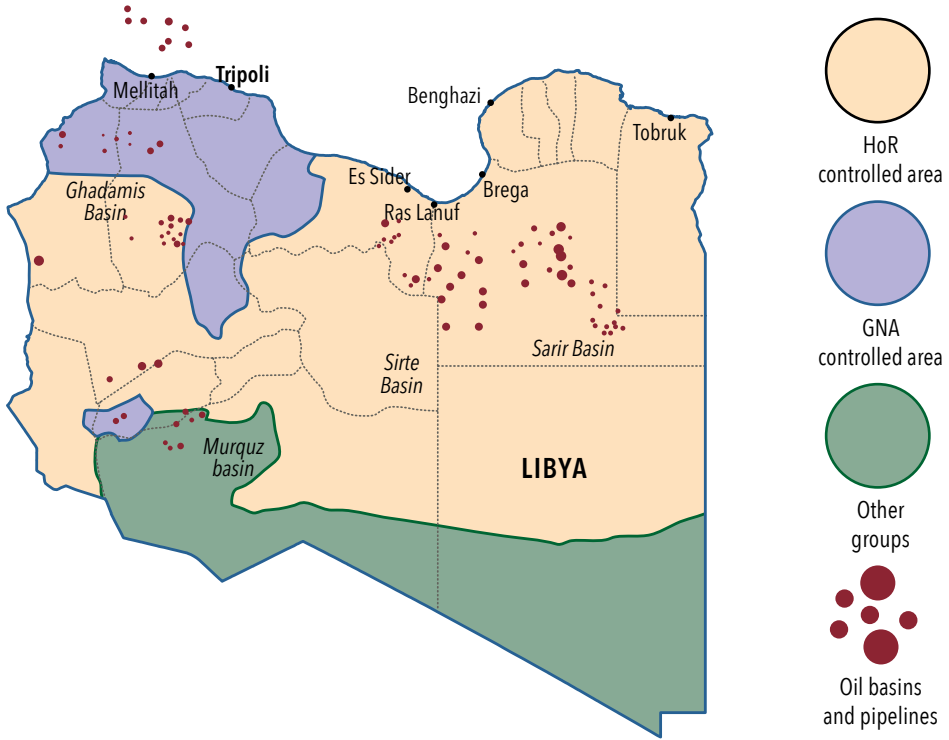
Share of hydrocarbon revenues out of
Libyan total exports



and Bashagha likely undertook those independent initiatives with a view to securing a political role for themselves in the future. They did so by distancing themselves from the resigning Prime Minister and siding with the GNA in the dispute between Italy and Turkey. In the east, General Haftar gradually lost ground internally and internationally after failing to capture Tripoli. With the notable exception of the United Arab Emirates (UAE), the sights of the main sponsors of the HoR - Egypt, France, and Russia - shifted from Haftar to Aguilah Saleh, Head of the Tobruk-based parliament, as the political representative of the pro-HoR coalition. Saleh, unlike Haftar, was not directly involved in the military operation in Tripoli and is therefore more credible in the eyes of the GNA in a phase characterised by

LIBYA: MATTERS ON THE GROUND

Areas of control in Libya (as of November 2020)



Source: Libya Liveuamap

diplomatic rather than military activity. Finally, the protests in the east, which led to the resignation of the Tobruk-recognised Prime Minister, showed that the LAAF has lost part of its grip in this area.

Outside the Libyan borders, several states launched political initiatives in an attempt to reach a diplomatic solution to the conflict. Russia, Turkey, Egypt, Morocco, and key European Union (EU) countries engaged in diplomatic efforts to discuss the crisis. Representatives of both sides eventually met in Bouznika (Morocco) and reached an agreement on the holders of what are known as “sovereign positions”, which include among others the Governor of the Central Bank of Libya (CBL) and the President of the Libyan Supreme Court (LSC). These two authorities are critical for the national balance of power, since the CBL pays public salaries across the country and the LSC is the supreme judicial authority. Over the last years,

disagreement between the two sides led to a statement whereby the Tobruk-based authorities set up de facto independent institutional bodies in the east.

18 months

Deadline set by the HoR in October 2020 to organise elections in Libya



In spite of the agreement reached by the two sides on sovereign positions, other issues still require further discussion, most notably the fact that formally the GNA and the HoR lack mutual recognition. A possible way out would be to hold new elections, an option that is ruled out by the current security conditions. Moreover, there is disagreement on the timing of the vote. The GNA argues that the presidential and parliamentary elections should take place on the same day as

FIVE YEARS OF PEACE ATTEMPTS

Timeline of Libyan peace negotiations (2015-2020)

- UN endorsed peace process ● Italian initiative
- German initiative ● Moroccan initiative
- Turkish-Russian initiative ● Egyptian initiative

FIRST PHASE (January 2015-December 2015)

- **January 15, 2015**
UN-endorsed peace talks resume in Geneva
- **December 17, 2015**
The two rivals reach an agreement in Skhirat

SECOND PHASE (September 2017 – April 2019)

- **September 20, 2017**
The UN special envoy Ghassan Salamé announces an 18-months set of local meetings in preparation to Libyan National Conference
- **April 5, 2018**
Several local meetings take place for three months in preparation to the National conference consultation process
- **November 9, 2018**
The UN publishes the conclusions of the local meetings
- **November 13, 2018**
Italy organises the Palermo conference with Libyan and international belligerents, to support negotiations towards a concluding National Conference meeting
- **April 9, 2019**
The UN-endorsed National Conference meeting is annulled due to the LAAF offensive on Tripoli

THIRD PHASE (January 2020 – October 2020)

- **January 8, 2020**
Turkey and Russia announce a ceasefire in Libya following meetings in Ankara
- **January 19, 2020**
The UN and Germany convene representatives of 11 countries and three multilateral organisations for the Berlin Conference, concluding with renewed formal commitments to UN resolutions on Libya and ceasefire
- **June 7, 2020**
Egypt presents the Cairo initiative endorsed by Haftar and the Speaker of the HoR Aguila Saleh
- **September 9, 2020**
The UN convenes various Libyan stakeholders in Montreux, Switzerland, for framing talks on the upcoming Political track
- **September 11, 2020**
Delegations from rival institutions meet in Bouznika, Morocco for political talks
- **September 27, 2020**
Military officials from the GNA and LAAF meet in Hurghada (Egypt) for preparatory talks on the UN plan to de-militarise Sirte and future unification
- **October 8, 2020**
Delegations from rival institutions reach an agreement on the sovereign position in Bouznika
- **October 23, 2020**
The GNA and the LAAF sign a permanent ceasefire under UN auspices

Source: UN, News, government websites

early as possible, possibly in March 2021. The HoR insists instead on creating a new presidential council in Sirte with three members from Tripolitania, Fezzan, and Cyrenaica before the elections can take place. At the current stage, the HoR envisions elections no sooner than 18 months from now, with the possibility of an additional 6-month extension. Another divisive issue is the de-militarisation of Sirte, which would require disarming armed groups and deploying mixed teams under the command of the GNA Interior Minister and the HoR-nominated interim government. Despite agreeing in principle on the creation of a national army, the contenders widely disagree on the strategy for reaching such a goal. The HoR identifies the LAAF as the Libyan national army. Consequently, in their view, irregular armed groups should be integrated into this institution, with the exclusion of those western Islamist militias which they consider terrorists. The GNA, on the other hand, does not recognise the LAAF as a legitimate expression of the armed forces and therefore calls for the creation of a new national army altogether. Finally, the two sides disagree on the criteria for the distribution of hydrocarbon revenues, which represent 95% of total Libyan exports. The main point of disagreement is whether to transfer the revenues to local authorities or to citizens directly.

HOW CAN THE EU SUPPORT A NEGOTIATED SETTLEMENT?

European policymakers can contribute to solving the most contentious issues between the GNA and the HoR. On the international level, the EU can join the new US administration in a multilateral initiative to settle the crisis. The EU could use its leverage on Turkey, which is discussing with the EU how to modernise the customs union and obtain a full visa liberalisation. This mediation could also include Eastern Mediterranean issues like the delimitation of exclusive economic zones. A change in Libya's policy towards Ankara would also reassure Egypt, displeased with Turkey mainly because of its support to political Islamists in Libya and elsewhere. With regard to Cairo, European policymakers could exert diplomatic pressure to bring to an end Egypt's current support for the LAAF in order to increase the chances of reaching a political solution in a context where Haftar's military initiative has proven largely ineffective.

The first option for European mediation is securing the de-militarisation of Sirte. The European Union and its member states could facilitate dialogue between Egypt and Turkey, which have a similar interest in temporarily freezing the conflict to return on their political and military investment in Libya. A successful agreement between Cairo and Ankara would isolate and identify spoiler states in the crisis. These states would pay a high reputational price for their actions in an international framework where the players are pushing for negotiations to succeed. Furthermore, European policymakers and its member states could support the recently-agreed establishment of joint patrols in this area by offering training to the local armed forces. They could also endorse the recent agreement on the sovereign positions which the two rivals reached in Bouznika, and share best practices to make these institutions more transparent and efficient.

The dismissal of militias and their integration in the security infrastructure is another crucial issue. The European Union and its member states can help to enforce the current weapons embargo by maintaining the IRINI naval mission in operation. However, preventing new weapons from reaching the Libyan territory would not be sufficient to disarm the militias. In the western part of Libya, the GNA lacks the authority to impose their disarmament and their subsequent integration in a new army. In the east, the LAAF is the leading security provider, and it will not be easy to convince the members of this group to join a new national army. A gradual approach is thus needed to han-

dle the issue. One option could be the formation of a new national police force. In this framework, European policymakers could help by supporting police training, thanks to the expertise gained by EU member states in several conflict zones. The European Union could also mediate national negotiations on the criteria and quotas for integrating members of irregular armed forces in the future national army.

392,241

Libyan internally displaced persons in August 2020



European policymakers could also contribute to supporting negotiations on the distribution of revenues. More specifically, they could temporarily hold Libyan hydrocarbon revenues in an escrow account in a European bank. This EU proposal would help to overcome criticism from HoR members on the funds' management by the authorities in Tripoli, since both sides would likely trust a European financial institution. Moreover, this would buy some time to eventually establish a joint commission to control energy production to ensure a fair distribution of revenues. European policymakers could also support the recent mediation of the GNA minister Ahmed Maiteeq to resume oil production and ensure shared criteria for distributing the related revenues. Finally, they could provide technical support to the future government of Libya concerning the resumption of oil and gas extraction together with neighbouring countries.

2



An abstract graphic on a solid red background. It features several thick, light-red lines and circles. One line descends from the top left to a circle. From this circle, two lines branch out: one goes up and right to another circle, and the other goes down and right to a third circle. A vertical line descends from the top circle. Another vertical line descends from the bottom-left circle. A diagonal line descends from the top circle to the right edge of the frame.

***SHARED
PROSPERITY***

Times of economic crisis in the MENA region

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In the second half of the 2010s, the economic situation in the Middle East and North Africa (MENA)¹ deteriorated as a result of lower oil and other commodity prices, a new round of domestic political instability, continuous intra-regional conflicts, stalled economic and governance reforms and, finally, the COVID-19 pandemic. The deteriorating macroeconomic trends manifested themselves in slower growth rates (which in 2020 turned negative almost everywhere), worsening fiscal and external balances, increasing public debt and, in several cases, higher inflation. There has been no visible progress in resolving long-term structural and institutional challenges such as high unemployment, especially among youths, low female labour market participation, poor quality of education, costly and ineffective public sector activity, high military and security spending, high energy subsidies and others.² Our analysis will be divided into three parts: the macroeconomic situation before the COVID-19 pandemic; the direct and indirect impact of the pandemic on the MENA economy; and brief recommendations on anti-crisis policies and reforms.

THE MACROECONOMIC SITUATION IN THE PRE-PANDEMIC PERIOD

The growth of real GDP, which was slower after the global financial crisis of 2008-2009, further decelerated in the second half of the 2010s (see the first table on the next page). One may distinguish between two broad categories of countries: (i) those directly affected by high-intensity conflicts (Iraq, Libya, Syria and Yemen) and international sanctions (Iran), and (ii) the others. The first category experienced high growth volatility determined by the

changing intensity of conflict and sanctions, and fluctuation in oil and natural gas prices (data for Syria is missing).

The second category is very heterogeneous: it includes both net oil exporters and importers, countries belonging to all income groups, countries that enjoy relative political stability and those suffering from internal political tensions and low-intensity conflicts. Nevertheless, with few exceptions (Djibouti, Egypt), growth rates were low and declining everywhere, in some cases (Sudan, Lebanon) already becoming negative before 2020.

As a result, due to high population growth rates, GDP per capita was either stagnating or declining long before the pandemic. This may not be an existential challenge for the high-income Gulf monarchies but it is certainly a challenge for a large group of lower-middle and low-income countries. The situation was particularly dramatic for the poorest countries like Somalia, Mauritania and Yemen.

73%

Inflation in Sudan in 2018



Slow growth is also insufficient to generate enough jobs for the rapidly growing labour force and to eradicate poverty. This appears evident in the second table on the next page: little improvement if any has been recorded in total unemployment figures in low- and middle-income countries. High-income Gulf countries, which import a lot of labour from Asia and other MENA countries, are exceptions. Female and youth unemployment rates look even worse, with very few exceptions (Bahrain, Qatar and the UAE).

MENA REGION: A DECELERATING GDP

Annual growth of real GDP %, 2015-2020

Country	2015	2016	2017	2018	2019	2020 ^a	2020 ^b
Algeria	3.7	3.2	1.3	1.4	0.7	-5.2	
Bahrain	2.9	3.5	3.8	2.0	1.8	-3.6	
Djibouti	7.7	6.7	5.4	8.4	7.5	1.0	
Egypt	4.4	4.3	4.1	5.3	5.6	2.0	2.0
Iran	-1.6	12.5	3.7	-5.4	-7.6	-6.0	-6.0
Iraq	2.5	15.2	-2.5	-0.6	3.9	-4.7	
Jordan	2.6	2.1	2.1	1.9	2.0	-3.7	
Kuwait	0.6	2.9	-4.7	1.2	0.7	-1.1	
Lebanon	0.2	1.5	0.9	-1.9	-6.5	-12.0	
Libya	-13.0	-7.4	64.0	17.9	9.9	-58.7	
Mauritania	5.4	1.3	3.5	2.1	5.9	-2.0	
Morocco	4.6	1.0	4.2	3.0	2.2	-3.7	
Oman	4.7	4.9	0.3	1.8	0.5	-2.8	
Qatar	3.7	2.1	1.6	1.5	0.1	-4.3	
Saudi Arabia	4.1	1.7	-0.7	2.4	0.3	-2.3	-6.8
Somalia	3.5	2.9	1.4	2.8	2.9	-2.5	
Sudan	1.9	3.5	0.7	-2.3	-2.5	-7.2	
Tunisia	1.2	1.2	1.9	2.7	1.0	-4.3	
UAE	5.1	3.1	0.5	1.7	1.3	-3.5	
Yemen	-28.0	-9.4	-5.1	0.8	2.1	-3.0	

red font indicates
IMF staff estimates
or forecasts.

2020^a:
April 2020 forecast;
2020^b:
June 2020 forecast

A RAPIDLY GROWING LABOUR FORCE, NOT ENOUGH JOBS

Unemployment total, female and youth (15-24), % of labor force, modelled ILO estimate, 2015-2019

Country	Total unemployment			Female unemployment			Youth unemployment		
	2015	2017	2019	2015	2017	2019	2015	2017	2019
Algeria	11.2	12.0	11.7	16.7	21.1	21.1	29.7	29.6	29.5
Bahrain	1.1	0.7	0.7	3.7	2.8	3.0	5.3	3.9	4.6
Djibouti	10.6	10.4	10.3	10.8	10.5	10.4	20.9	20.8	20.8
Egypt	13.1	11.7	10.8	24.9	23.1	22.1	34.3	32.9	31.1
Iraq	10.7	13.0	12.8	22.2	31.0	30.4	21.4	25.5	25.1
Qatar	0.2	0.1	0.1	0.9	0.6	0.4	0.6	0.5	0.4
Oman	3.6	3.0	2.7	13.2	12.4	11.9	15.0	13.4	13.2
Iran	11.1	12.1	11.4	19.5	19.9	18.6	25.9	28.0	27.4
Jordan	13.1	15.1	14.7	22.7	24.0	23.3	30.9	35.4	35.0
Lebanon	6.4	6.2	6.2	10.4	10.1	9.9	17.7	17.4	17.6
Kuwait	2.2	1.8	2.2	4.7	4.8	5.5	15.3	13.7	15.8
Mauritania	9.8	9.6	9.5	12.2	12.0	12.1	15.1	14.8	14.8
Morocco	9.5	9.2	9.0	10.4	10.7	10.4	20.9	22.3	22.1
Saudi Arabia	5.6	5.9	5.9	21.7	20.3	22.1	29.2	26.9	28.6
Somalia	11.6	11.4	11.4	11.4	11.1	11.1	17.5	17.1	17.0
Sudan	17.3	17.1	16.5	30.0	29.5	27.8	32.6	32.4	31.4
Tunisia	15.2	15.4	16.0	22.4	23.1	23.4	34.2	34.8	36.3
UAE	1.9	2.5	2.3	4.7	7.1	6.0	6.5	7.9	7.3
Yemen	13.4	13.2	12.9	25.3	25.5	24.9	24.6	24.4	24.0
MENA	10.1	10.2	9.8	18.2	18.6	18.1	27.0	27.4	26.9

Data: IMF World Economic Outlook database; World Bank's World Development Indicators

LEND AND BORROW

General government net lending/borrowing, % of GDP

Country	2015	2016	2017	2018	2019
Algeria	-15.3	-13.1	-6.6	-4.5	-5.1
Bahrain	-18.4	-17.6	-14.2	-11.9	-10.6
Djibouti	-15.4	-8.3	-4.5	-2.8	-0.8
Egypt	-10.9	-12.5	-10.4	-9.4	-7.4
Iran	-1.8	-2.3	-1.8	-1.9	-5.6
Iraq	-12.8	-13.9	-1.6	7.9	-0.8
Jordan	-8.5	-3.7	-3.6	-4.7	-6.1
Kuwait	5.6	0.3	6.3	9.0	4.8
Lebanon	-7.5	-8.9	-8.6	-11.3	-10.7
Mauritania	-2.4	0.1	0.5	3.4	2.8
Morocco	-4.2	-4.5	-3.5	-3.7	-4.1
Oman	-15.9	-21.3	-14.0	-7.9	-7.0
Qatar	4.5	-5.4	-2.9	5.2	4.1
Saudi Arabia	-15.8	-17.2	-9.2	-5.9	-4.5
Sudan	-3.8	-4.5	-6.5	-7.9	-10.8
Tunisia	-5.2	-6.2	-5.9	-4.6	-3.9
UAE	-3.4	-2.8	-2.0	2.0	-0.8
Yemen	-10.0	-9.2	-5.3	-6.7	-3.8

red font indicates IMF staff estimates or forecasts.

Data: IMF World Economic Outlook database

Inflation remained on a one-digit level in most MENA countries except for Sudan, Iran, Egypt, Libya and Yemen where it was two-digit in all or part of the period of 2015-2019. In Sudan, it reached 73% in 2018.

The fiscal situation looks less good. In 2019, all MENA countries except for Kuwait, Mauritania and Qatar ran general government (GG) deficits (see table above). In three cases (Bahrain, Lebanon and Sudan) they exceeded 10% of GDP.

If one compares the fiscal balances in the second half of the 2010s with the ones from ten years earlier, the most striking difference concerns hydrocarbon producers (Algeria and Gulf countries). Once running fiscal surpluses and cumulating them in sovereign wealth funds, since 2014 they started spending massively. Limited increase in oil prices in 2017-2019 allowed them to reduce large fiscal deficits.

Among net oil importers, Egypt, Jordan, Tunisia and Lebanon have made little or no progress in fiscal consolidation even if the first three benefited from International Monetary Fund (IMF) programmes. Fiscal balances in Iraq and Yemen have

been affected by a changing intensity of conflicts (there is no data for Libya and Syria). In Iran it has been determined by changes in oil prices and the international sanctions regime.

The deteriorating fiscal accounts unavoidably led to expansion of both gross and net public debt (see table on the next page). While the GG net debt statistics do not cover all analysed countries, they clearly show that since 2015 hydrocarbon producers have depleted their net fiscal reserves.

The GG gross debt-to-GDP ratio increased in most countries between 2015 and 2019, sometimes at a rapid pace. The group of highly indebted countries includes Sudan (over 200% of GDP in 2019), Lebanon (over 150% of GDP), Bahrain (over 100% of GDP), Jordan, Egypt, Mauritania and Tunisia (between 70 and 100% of GDP). The World Bank analysis estimated that 11 MENA countries were already on unsustainable fiscal paths in 2019 (before the pandemic hit). That is, their primary fiscal balances could not stabilise debt-to-GDP ratios.³

The situation in Lebanon spun out of control, leading to the country's sovereign default on 7 March 2020.⁴ The tragic explosion in the Beirut harbour and the resignation of the government in August 2020 has delayed debt restructuring negotiations and the application for IMF assistance. Default and the lack of a swift anti-crisis response caused a substantial depreciation of the black-market exchange rate of the Lebanese pound an inflation shock.

IMPACT OF THE COVID-19 PANDEMIC

The development of the COVID-19 pandemic meant an additional negative shock to the already stagnant and fragile macroeconomic situation in the MENA region, including the effects of the health crisis and lockdown measures, the temporary interruption of supply chains, a dramatic decline in tourism revenue and labour remittances, and lower oil prices.

The pandemic's effects are hard to forecast but according to the IMF projection of April 2020 (see the first table on the previous page), GDP will fall in every single country in the region except Egypt and Djibouti. Furthermore, the IMF projection updated in June 2020 suggests that the GDP loss for the region in 2020 will be even larger than anticipated in April, for example in Saudi Arabia.

DEBT EXPANSION

Gross and net GG debt to GDP ratio, %

Country	GG gross debt					GG net debt				
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Algeria	8.7	20.5	27.3	38.3	46.1	-7.6	13.3	21.6	26.5	37.3
Bahrain	66.0	81.3	88.2	94.7	101.7					
Djibouti	39.9	45.7	47.9	48.0	47.4	38.0	43.7	46.0	47.0	46.4
Egypt	88.5	96.8	103.2	92.7	84.9	78.8	88.2	93.9	81.3	75.4
Iran	38.4	47.5	39.5	32.2	30.7	21.7	34.5	28.9	25.5	27.3
Iraq	56.9	64.3	58.9	49.3	51.1					
Jordan	92.4	93.8	94.3	94.4	94.6	84.9	86.5	88.0	89.7	90.1
Kuwait	4.7	10.0	20.7	14.7	15.2					
Lebanon	140.7	146.1	149.0	151.0	155.1	134.3	140.4	143.4	146.8	151.1
Mauritania	75.2	77.4	75.9	82.9	78.5	73.5	76.3	74.4	79.8	76.2
Morocco	63.7	64.9	65.1	65.0	65.3	63.1	64.4	64.7	64.7	65.0
Oman	15.5	32.7	46.4	53.4	59.9	-22.8	-1.0	13.4	32.2	39.0
Qatar	35.5	46.7	49.8	48.6	53.2					
Saudi Arabia	5.8	13.1	17.2	19.0	23.2	-35.9	-17.1	-7.7	-0.1	6.8
Sudan	92.2	128.4	159.2	212.1	207.0					
Tunisia	55.4	62.3	70.6	77.0	74.4					
UAE	18.7	20.2	20.0	19.1	20.1					
Yemen	65.5	79.6	84.3	64.8	56.3	64.5	78.5	83.3	64.1	55.8

red font indicates IMF staff estimates or forecasts.

Data: IMF World Economic Outlook database

Oil producers were hit by the collapse of oil prices in March 2020, driven both by the fall in global demand and the breakdown of coordination between suppliers (the latter has been partially rebuilt in April 2020, somewhat stabilising prices on the low level).

The deep recession, lower GG revenue and higher expenditure will further deteriorate fiscal balances and debt-to-GDP levels, which may lead to more sovereign defaults in a near future.

At the end of February and early March 2020, the region was hit by broad capital flight; the IMF estimates around \$6 to 8 billion of portfolio capital outflows, numbers which they concede may be even larger given the lack of official figures.⁵ However, the magnitude of this shock was smaller than in other emerging markets, especially Latin America and the former Soviet Union.⁶

The first figure on the next page presents the spreads between the USD-denominated debt and US Treasuries in selected MENA countries.⁷ It shows that, while spreads widened significantly in the first days of the crisis, market confidence

has largely recovered in most cases, with spreads nearing their pre-COVID levels. This improvement in market sentiment is partially explained by the significant monetary and fiscal policy response in the developed world, which has loosened global financing conditions. Both countries with a high credit rating (oil producers) and lower credit-rated countries such as Egypt have managed to maintain market access, both with USD denominated and local currency bonds.

\$6 to 8 billion

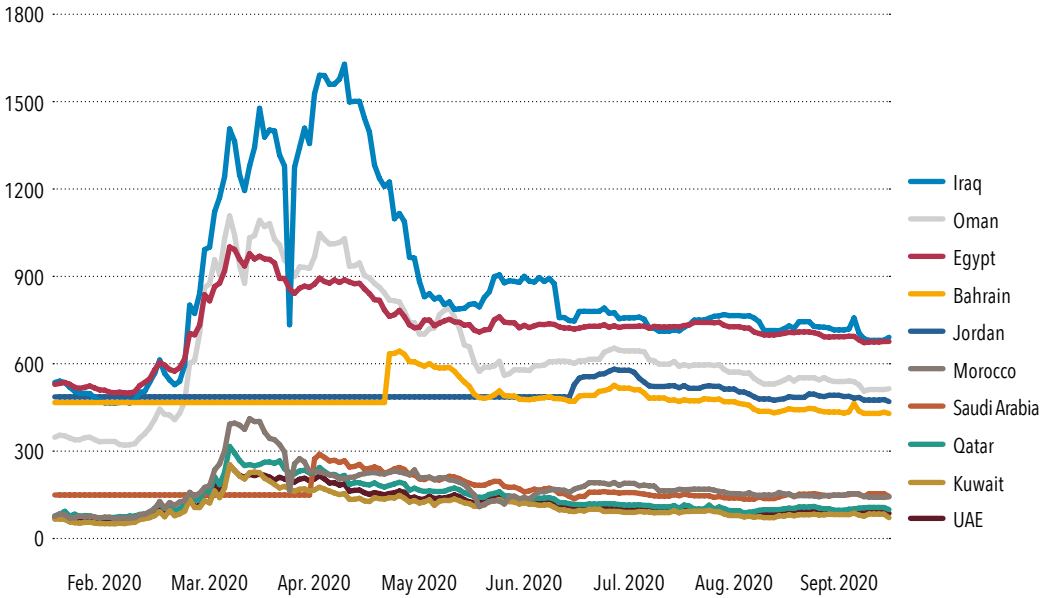
Regional portfolio
capital outflows
(IMF estimate, early 2020)



Depreciation of MENA currencies was modest (except the Lebanese pound) and they largely recovered (sometimes even with a positive margin) after the initial fall in March - April 2020 (see second figure on the next page). However, it should be noted that most MENA currencies are pegged to the USD and no data are available on changes in the international reserves of MENA central banks

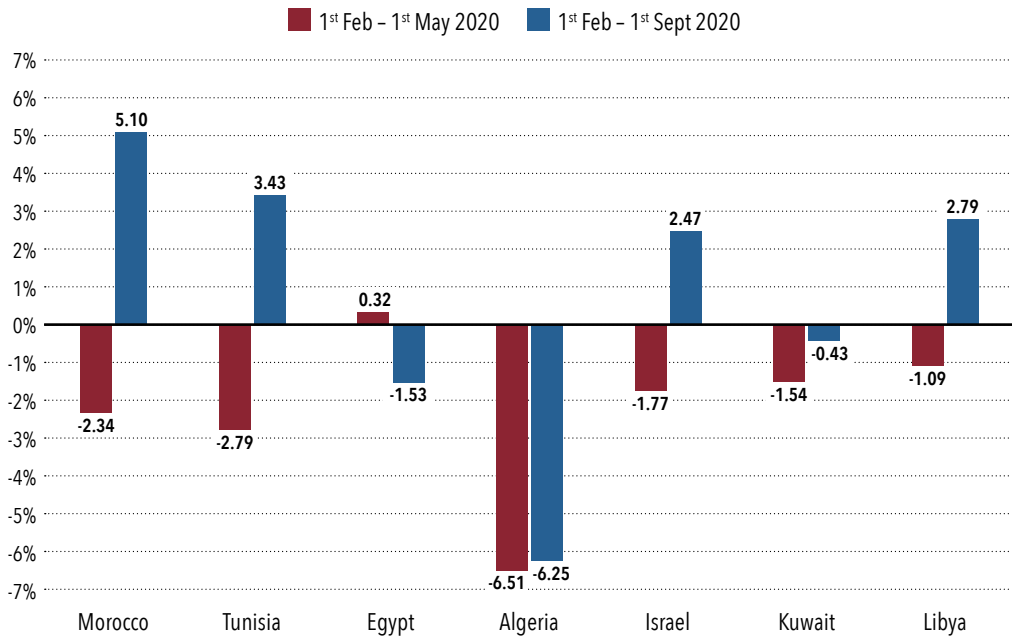
BACK TO PRE-COVID-19 LEVELS

Spread between the sovereign dollar-denominated debt and UST, basis points, Feb. – Sept. 2020



DEPRECIATION AND RECOVERY

Change in value of MENA currencies against the USD, February-September 2020



Data: Bloomberg

in the analysed period. Furthermore, not all MENA currencies are fully convertible.

CHALLENGES AND REFORM PRIORITIES

Dealing with the health emergency is the immediate and most important challenge in the MENA region. Some countries face shortages in medical capacity as well as other related services (e.g., sanitation). The most fragile countries have around 17 million internally displaced persons and close to 3 million refugees, which puts them in a more precarious situation.⁸

Uncertainty will prevail in the coming months. Subsequent waves of the pandemic and the associated containment measures may be an important obstacle to recovery. Hardships and increasing poverty may provoke social unrest in the already politically fragile states.

Reform in the region has been slow in recent years, and since the pandemic started, the priority has shifted towards managing the health and economic shock. In this regard, multilateral assistance has played a significant role, with the IMF at the centre. For example, Egypt, Jordan and Tunisia have received emergency assistance under the Rapid Financing Instrument, while Djibouti and Mauritania have benefited from the Rapid Credit Facility (which includes concessional terms of its servicing). Neither of these instruments include ex-post conditionality. Therefore, it is less likely they will pave the way towards structural reforms (which progressed slowly under the “standard” IMF as-

sistance programs). Morocco has drawn from its precautionary credit line, while the IMF-supported programme in Jordan has been modified and a new Stand-By Arrangement with Egypt was approved.²

11

MENA countries that before the pandemic were already on an unsustainable fiscal path



Following recovery, the focus should shift towards rebuilding fiscal buffers, lowering debt and raising international reserves. State-Owned Enterprises (SOE) liabilities present an additional source of vulnerability. For hydrocarbon dependent countries, economic diversification should be a priority, in light of the oil price collapse and the expected progress in “greening” the global economy.

Other structural and institutional obstacles to sustainable, more balanced and socially just economic growth include, among others, bureaucratic barriers to business activity, corruption, poor governance, outdated regulations, trade protectionism, restrictions to foreign investment, limited currency convertibility, underdeveloped infrastructure, poor quality of public services (especially education), social exclusion, and others. They should be removed by comprehensive reform programmes with the support of international donors.

Resolving regional conflicts could also help the economic and social agenda by offering a substantial peace dividend.

COVID-19: a harbinger of greater inequality

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The economic impact of the COVID-19 pandemic is likely to widen income inequality gaps and increase social vulnerability among the middle and lower classes across Middle Eastern and North African (MENA) societies. The region is bracing for a widespread economic downturn. This comes on the heels of years of economic policies that emphasised limiting spending, as the region deals with the aftermath of years of social and political turbulence and broader economic shifts including the fluctuations of gas and oil prices. Governments are struggling to square the spending needs of immediate responses to the pandemic with longer-term economic recovery plans. Meanwhile, the underlying causes of inequality will likely remain unaddressed, setting the stage for greater inequality and more vulnerability, thus paving the way for even greater instability.

According to the International Monetary Fund (IMF), in 2020 the pandemic is expected to result in a 5.1% drop across all MENA economies¹ and a fiscal deficit of 10.6%, compared to 0.5% growth and a 4.0% deficit registered in 2019. A 45% decline in foreign investments is projected to lead to the loss of nearly 1.7 million jobs, including 700,000 held by women. The resulting losses of income are likely to push 14.3 million people across the region into poverty.² According to data from UNESCWA, the headcount poverty rate in 2020 is expected to rise to 115 million, or roughly 32.4% of the region's population. This is a considerable increase from the 2010 rate of about 66 million people (22.8% of the population).³

These forecasts are set to intensify social vulnerabilities and further increase inequalities that were

already stark in a region that ranks as the most unequal in the world: according to a 2018 study by the World Inequality Lab, 64% of total regional income went to the highest 10% of income earners in the Middle East.⁴ Comparatively, the same figures for Western Europe and the United States correspond to 37 and 47%, respectively. By 2019, the wealthiest 10% of adults in the region accounted for 76% of the region's total household wealth.⁵

A DECADE OF PAINFUL ECONOMIC POLICIES

This widening inequality is the result of years of economic policies that prioritised economic growth – mostly in response to the 2011 protests. However, economic growth has been modest at best and has not benefited the majority of the population.⁶ Over the course of nearly ten years, the region has seen a steady rise in income poverty. In fact, of all developing regions, the Middle East and North Africa was the only one to experience a rise in income poverty from 2010 to 2019.⁷

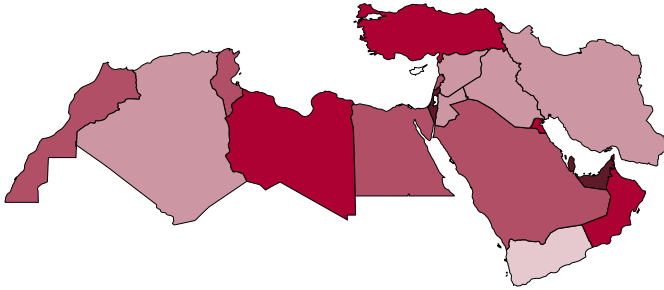
Prioritising economic growth has meant shifting spending patterns. In some cases, this has led to cutting subsidies to control public spending; in other cases, restructuring public sectors to lower wage bills, spending less on infrastructure, and cutting back on social safety nets. In other instances, it has meant instituting heavy taxes on the middle and lower classes to increase state income. Furthermore, countries such as Lebanon and Jordan have had to pursue painful austerity measures over the past year, in response to liquidity and solvency crises, respectively.

Over the course of nearly a decade, these policies have cumulatively compromised access to welfare services and social safety nets for the ma-

WOMEN IN THE JOB MARKET, HOW IS IT GOING?

Female labour force participation rate (age: 15+) in the MENA region

5-10% 10-20% 20-30% 30-50% 50-60%



Israel	59.7%	Saudi Arabia	22.3%
Qatar	56.8%	Egypt	22.0%
UAE	52.5%	Morocco	21.4%
Kuwait	49.3%	Iran	17.3%
Bahrain	45.0%	Algeria	14.6%
Turkey	33.9%	Jordan	14.4%
Libya	33.8%	Syria	14.3%
Oman	31.0%	Iraq	11.8%
Tunisia	25.6%	Yemen	5.7%
Lebanon	22.9%		

Data: World Bank

majority of citizens, limited employment opportunities, and left public service structures vulnerable. These broader economic shifts have driven greater numbers of people into the informal labour sector,⁸ which is largely composed of unregistered workers without social security or health insurance coverage. The region's informal labour force is vast, accounting for 56.3% of employment in North Africa and 65% in the Middle East.² Of the roughly 16 million informal workers in the region, 89% will have no social protection as a result of the pandemic.¹⁰ In 2011, these numbers were significantly lower, reaching as high as 44% in Morocco and hovering around one-third across oil producing states.¹¹

In this new reality, some groups have become particularly vulnerable and face a dire future as a result of the pandemic – particularly women, migrants, and refugees.

THE MOST VULNERABLE

The pandemic is shining a light on the particular needs of vulnerable groups such as women, migrants, and refugees. A severe gender income gap afflicts the whole region: prior to the pandemic, women's per capita income was on average 78.9% lower than that of men in the region¹² – the widest gap in the world. Women, who already deal with discrimination and social pressures on a regular basis, are now faced with additional obstacles to accessing services such as education and employment as well as leadership and decision-making posts, not to mention greater eco-

nommic difficulties, for instance in accessing credit and obtaining financial loans.

Education and work have largely moved online, but women have more limited access to the internet. This is the case in countries like Morocco, where only 54% of women have access to the web (the national household average is 68.5%).¹³ Women also tend to hold informal jobs. Roughly 61.8% of the regional informal sector is occupied by women.¹⁴ This sector of the labour market has been severely impacted by the pandemic, as these jobs often depend on the formal economy and services that require direct contact with people.¹⁵ Lockdowns and curfew measures, combined with economic and psychosocial stress, have also led to an increase in domestic violence.¹⁶ Another significant long-term implication of growing inequalities against women concerns their role and access to leadership. In the MENA region, women are disproportionately underrepresented in leadership and decision-making posts, particularly with reference to the response to the pandemic. Their absence from such spaces will impact the lives of women and girls for years to come.¹⁷

The pandemic will also worsen the conditions of the 13.7 million refugees and internally displaced peoples (IDPs) in the region.¹⁸ A host of factors make this group among the most at risk.¹⁹ Government responses such as lockdown measures have had a substantial impact on this group, as IDPs and refugees are now unable to engage in what is often informal labour and their living conditions

in camps or crowded quarters are not conducive to safe social distancing. Today these groups are becoming even more exposed because of more limited access to health care and social safety nets, precarious employment and lack of access to financing and loans, as well as their inability to properly take precautions against COVID-19.

Lebanon, which is home to around 1.5 million Syrian refugees, 200,000 Palestinian refugees,²⁰ and many smaller refugee populations from Ethiopia, Iraq, Sudan, and Egypt,²¹ is a prime example. The situation is even more dire for refugees in light of the country's liquidity crisis and economic collapse and the deadly explosion at the Beirut Port. During the first few months of the pandemic, the Lebanese government adopted discriminatory policies that targeted these groups under the guise of COVID-19 prevention. Eighteen municipalities in Lebanon announced additional curfews solely restricting the movement of Syrian refugees, in an attempt to limit their movement in densely populated areas.²² While some curfews allowed refugees to move around the municipality between 9 a.m. and 1 p.m., one municipality in Darbaashtar prohibited any kind of movement within the Syrian refugee community.²³ Such discriminatory policies prevent refugees from seeking medical help as well as accessing their mostly informal work,²⁴ thus increasing their vulnerability and driving them to despair. Since the outbreak, 60% of Syrian refugees in Lebanon were laid off, compared to 39% of Lebanese citizens.²⁵

Migrant labourers face a similar fate. The region is home to nearly 14% of the world's migrant workers²⁶ who, like refugees, have nearly no access to labour or social protections. The exploitative conditions under which they are employed leave them vulnerable on several fronts, including the loss of financial and material benefits, lack of adequate health protections, and even deportation. In Saudi Arabia, where the country's roughly 13 million migrant workers are bound to their employer under the "kafala" system,²⁷ migrant labourers risk becoming even more marginalised as the pandemic progresses. Before the pandemic, Saudi Arabia gradually tightened restrictions on migrants, forcing them to pay higher taxes on their low daily wages.²⁸ Now, in response to the pandemic, the regime allowed companies to reduce salaries by up to 40%,²⁹ while also laying off hun-

dreds of thousands of migrant workers. Without these salaries, migrant workers are at risk of plunging deeper into poverty, prosecution for failing to pay taxes, and even deportation.³⁰ Although Gulf governments, including Saudi Arabia, have said they are providing free COVID-19 testing and treatment for migrant workers, these groups are disincentivised from using the little social protections offered. Living under consistent risks of detention or deportation, some migrant workers are too scared to seek out these services.³¹

MANAGING THE PANDEMIC: SHORT-TERM RELIEF AND LONG-TERM RECOVERY?

MENA governments are faced with neglected infrastructures and weakened social safety-nets, but they have yet to come up with a plan to respond to the urgent as well as long-term needs that would lead to comprehensive economic recovery. Little has been done by way of economic rescue or recovery plans that target the root causes of inequality and that would set the countries on a course towards sustained economic recovery. Few governments have put in place recovery efforts so far, and those that did have opted for measure that seem rather limited in scope or that rely on stronger external markets and significant international aid. For example, Morocco's recovery plan, which was launched in July, injects \$12.8 billion into the national economy,³² and pays particular attention to the tourism sector.³³ Tunisia's economic reform plan, which was announced in March and will extend for the next nine months,³⁴ is more comprehensive, but hinges on stronger economic activity in Europe.³⁵ The majority, however, have focused on shorter term fixes.

Since the outbreak of the pandemic in mid-March, most governments have responded with a mix of economic, financial, and social protection measures. Such policies have relied on implementing temporary social safety nets, combined with immediate economic relief measures such as lowering interest rates and rescheduling tax debts and loan payments.³⁶

In some instances, these fixes not only neglect the root causes of inequalities, but risk hindering the middle and lower classes' economic recovery once the pandemic is over. The Jordanian government, for instance, adopted measures in response to the shock of the pandemic that risk widening

COVID-19 IN PROTRACTED CONFLICTS

The impact of the COVID-19 pandemic in Syria, Libya and Yemen

With the pandemic, countries in protracted conflict—Syria, Libya, and Yemen—face a particularly toxic blend of challenges. Years of war have devastated these countries' economies, health sectors, and infrastructure; in this framework, the pandemic is set to increase poverty vulnerability. What is worse, the COVID-19 pandemic obstructs pathways to lasting peace. The crisis provides an opportunity for states and belligerent groups to double-down on their hold on power, reducing incentives to engage in meaningful resolution efforts.

In Syria, the pandemic and subsequent government responses paint a bleak picture. Even before the COVID-19 outbreak, over 80% of Syrians lived below the poverty line. The country went into an economic freefall well before the pandemic: between the end of 2019 and the beginning of June 2020, the Syrian lira depreciated from 632 liras against the US dollar to over 3,000. To curb the spread of the coronavirus, the Syrian government instituted lockdown measures that have amounted to economic losses of nearly \$1 billion per month.

Such deceleration of economic activities is expected to put over a million jobs

at risk. The price of food products has increased by 70% since the middle of March, adding further pressure on Syria's growing poor. This pressure was exacerbated by the few social protection measures mustered by the regime, such as the uneven distribution of food and aid across regime-held territories.

Similarly, in areas outside government control – northeast and northwest Syria – the decline of economic activities has resulted in higher prices and rising unemployment. The closure of borders and the suspension of humanitarian programming has also prevented vital aid and services from reaching Syrians most in need.

Similarly, in Yemen and Libya social inequalities were prevalent before the conflicts due to uneven income distribution policies, regime corruption, and poor governance. This, compounded by the armed conflict and now the pandemic, has set Yemen to become the poorest country in the world. Poor families and the 3.6 million internally displaced persons live in overcrowded locations with only three doctors and seven hospital beds per 10,000 people; against this backdrop, the lowest classes

are positioned to suffer the most in the world's worst humanitarian crisis. Moreover, humanitarian programmes have been forced to shut down in response to the pandemic, leaving many who were dependent on aid with no support. Libya's ongoing internationalised conflict will also deepen the wounds of the most vulnerable. Dependent on oil exports, Libya is set to face a steep decline in GDP growth should exports remain low—approximately 58.1%. The various political actors in Libya implemented modest measures, undermined by growing economic difficulties. Daily wage earners, women, and African migrants are the hardest hit, with one in three African migrants estimated to be food insecure. For everyone, income opportunities have diminished because of the implementation of lockdown measures and the prices of staple foods have increased by 20% on average (and in some areas, they have doubled).

The pandemic will thus act as a conflict multiplier, allowing actors like networks of warlords, criminals and militias to intensify their power consolidation efforts, while the most vulnerable shoulder the costs.

socioeconomic disparities among citizens. These include a measure to offer companies the possibility to opt out of contributing to social security pension schemes for three months. This has decreased companies' social security contributions from 21.75% to 5.25% of salaries. Additionally, the government adopted a redistributive measure that allocates 50% of maternity insurance revenues to material assistance for elderly and ill citizens. According to a recent Oxfam report, this measure, while rightly targeting vulnerable groups, deprives the middle class of important government revenue while leaving the wealthier classes unscathed.³⁷

Some governments have introduced temporary cash transfer programmes or unemployment benefits, but these measures are unlikely to meet the needs of unemployed citizens, including those in the informal sector. In Morocco, the government implemented a flat-rate compensation of up to 2,000 dirhams (MAD) to unemployed citizens, be-

ginning in early April.³⁸ The Egyptian government has also instituted similar benefits, which include a one-off cash transfer of 500 Egyptian pounds (EGP)³⁹. Yet both of these measures are below each country's average monthly minimum wage (2,700 MAD, or 25% lower, and 2,000 EGP, or 75% lower).

Planning for long-term recovery is another challenge that the countries in the region are called to address, a task made more difficult by the need to prioritise spending on urgent short-term measures. Economists anticipate that even after the pandemic, the oil market will structurally change, likely disadvantaging oil-exporting countries in the region; such drawbacks will also extend to the governments they have traditionally supported.⁴⁰ Short of undertaking comprehensive economic diversification and shifting toward inclusive economic reforms for the middle and lower classes, a sustainable recovery may remain elusive.

3 SHARED PROSPERITY

Economic diversification in Saudi Arabia in the wake of COVID-19

Karen E. Young

Resident Scholar, American Enterprise Institute

Twenty-twenty could be the year everything finally changed in the oil exporting monarchies of the Persian Gulf; or it may be the year that just enough changed to make the economic diversification challenge seem insurmountable. The first priority of economic diversification in the Gulf, as elaborated in Saudi Vision 2030 and other economic development plans across the Gulf Cooperation Council (GCC), is to reduce the government's dependency on hydrocarbon revenues as a proportion of government spending. A secondary goal is to spur growth in the private sector in order to create jobs for a large population of educated, but not necessarily skilled, citizens so that they can pay more for services that the government historically has provided for free. And in turn, the government can reduce its public sector wage bill. Everything from primary education to university, to health care and pensions, to subsidised electricity, water and gasoline are all prime for cost-cutting within government budgets. For Saudi Arabia, there is essentially a fiscal cliff in the next two decades to come. The revenue trajectory does not match the current spending trajectory.

TIME FOR BOOSTING THE NON-OIL PRIVATE SECTOR?

Now is the moment, if the Saudi government and its leadership intend to shift gears, reducing public expenditure and facilitating the growth of a private sector outside of oil. Unfortunately, the global structural pressures of plentiful oil supply (much of it due to technology advances and efficiencies of United States' shale production), an expected plateau of oil demand¹ from 2035 on-

wards, and the necessity of government stimulus to shield economic decline from the COVID-19 pandemic all make that shift more precarious. The recent reliance on foreign reserves and savings built up when oil prices were high in the "magic decade"² between 2003 and 2014 is unlikely to be replaced in the near term, exposing the government to future fiscal vulnerability and possible currency devaluation. Just evaluating the drawdowns of foreign reserves from the Saudi central bank (SAMA) between June 2014 and June 2020, foreign currency reserves declined from 2,800 billion SAR (\$746 billion) to 1,700 billion SAR (\$453.2 billion); meanwhile government deposits at SAMA declined from 1,600 billion SAR (\$426.5 billion) to 1,000 billion SAR (\$266.6 billion) over the same six year period, following reported data from SAMA and Riyad Capital.³

\$213.2 billion

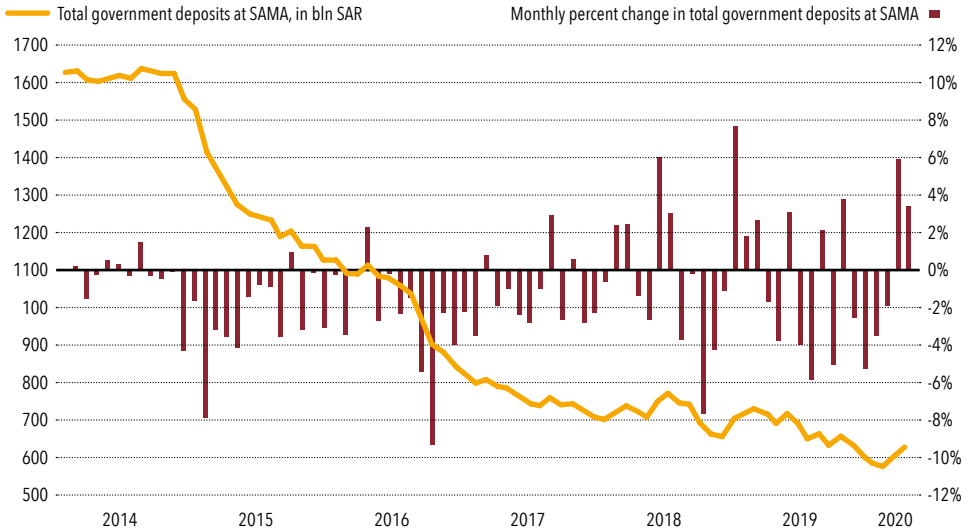
Saudi
government debt
in mid-2020



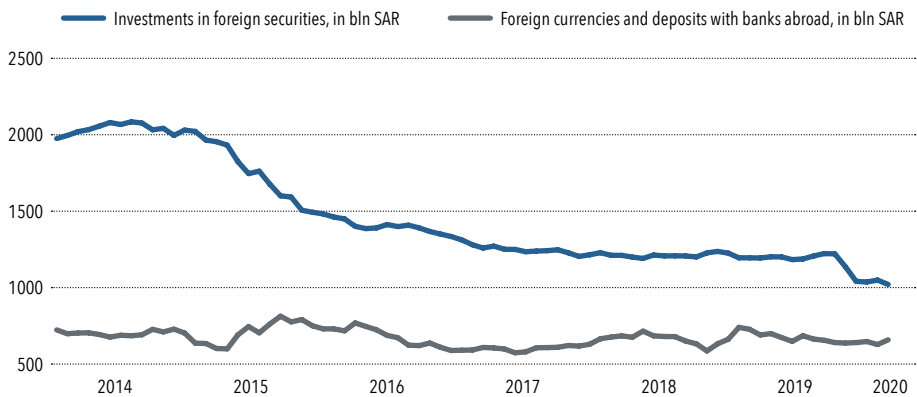
While global demand for energy⁴ is expected to increase, global oil demand is expected to plateau or decline over the next twenty years. In the same period, Saudi pension systems⁵ will be grossly underfunded, its public health and education systems overburdened, and social safety nets for the chronically unemployed and underemployed will all compete with the fiscal burden of debt service. The current "youth bulge" will not be replaced by a similar-sized young population once they reach their 50s and edge towards retirement. Even with substantial increases in taxation through the new 15% value added

SAUDI ARABIA: A FINANCIAL PICTURE

Government deposits at SAMA



Breakdown of foreign currency reserves at SAMA



Data: UN DESA

tax (VAT) and possible imposition of further fees and even a personal income tax, more expensive, aging citizens will be a larger demographic than the next generation of Saudi workers.

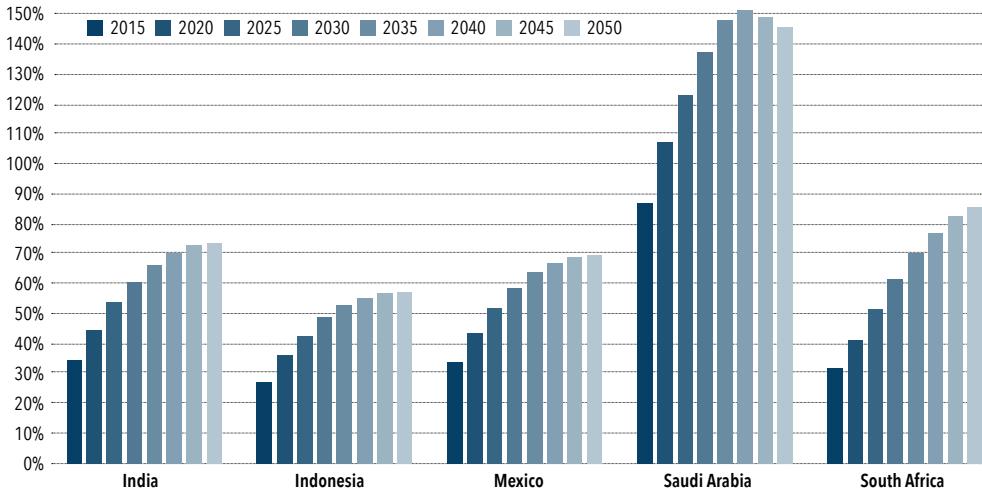
A COMPLEX PATHWAY TO DIVERSIFICATION

The sectors that were showing promise in diversification – such as tourism, hospitality and entertainment – also tend to be those most sensi-

tive to the effects of the COVID-19 pandemic. The development of these sectors represents a significant shift in the Saudi economy and in its society. Religious tourism already represents an important source of non-oil revenue to the Saudi economy, but even a substantial increase in tourism⁶ to archaeological and urban locations has a limited economic impact. COVID-19 will not last forever, and Saudi tourism will rebound.

HOW MANY AVAILABLE WORKERS?

Working population (change from 2000) of advanced-stage demographic transition countries



Data: UN DESA

For domestic tourism, the demand will depend on how Saudi citizens and consumers are able to increase discretionary spending, difficult for the reasons mentioned above, along with soaring Saudi consumer debt. For attracting international tourists and developing world class resorts, the Red Sea Development Corporation⁷ faces strong (and very established) regional competition and necessary capital investment that will only further drain state resources and anger local residents⁸ who will be displaced and unlikely to reap economic benefit from the government-owned projects.

sification strategy underway has used oil as a gateway (reliant on emerging markets in India and China)⁹ to other refined petroleum products and petrochemicals, such that Saudi Aramco might transform into more of an international oil company, with a full-scale production capacity in a variety of products and revenue streams, including the liquified natural gas business across a wide geography. That strategy has required investment partnerships, in which China has increasingly played a role. But China cannot save the Saudi economy, and the trajectory of Chinese demographic growth and demand for oil¹⁰ will decline just as Saudi Arabia most needs them as consumers.

Saudi population below the age of 34

67%

In the diversification efforts around hydrocarbon and energy production, there are Saudi government entities and businesses with substantial government investment in petrochemical production, refining, mining and renewables which also show promise for future growth but are equally hindered by the current global economic pandemic climate. The proactive diver-

Thanks to an external debt issuance spree since 2015, GCC states have made the Middle East a regional leader in bond issues now,¹¹ ahead of Asia and eastern Europe in emerging market external sovereign debt. Gulf external sovereign debt issuance was negligible as a proportion of emerging market debt in 2008; by 2017 it was more than \$50 billion in one year, and 2019 saw \$52.9 billion in new government debt, outpacing chronic borrowers in Latin America. Already in the summer of 2020, there

was \$40 billion in new Gulf issuance and analysts at Markaz expect that it could reach nearly \$70 billion¹² by the end of year. While access to international debt capital markets has been good for all of the GCC states, including those with weaker credit ratings like Bahrain and Oman, governments are entering an addictive cycle, relying on debt to meet an annual funding gap. Saudi Arabia's government debt has ballooned from less than 100 billion SAR (\$26.2 billion) in 2014 to more than 800 billion SAR (\$213.2 billion) in mid-2020, with an increasing reliance on external dollar-denominated bonds. The coming debt service burden will substantially restrict fiscal policy into the future.

THE KINGDOM OF THE FUTURE: WHAT TO EXPECT?

The future of Saudi Arabia is one that is more middle-class or working class in its citizen demographics, more female in family leadership and breadwinning, with growing consumer debt burdens, populations that are more heavily taxed,

and concentrated in cities that are more and more expensive to live in. This is not necessarily a recipe for political unrest, but it is certainly a different understanding of shared wealth from natural resources and expectations of how the government will be able to redistribute that wealth to citizens.

15.78% Saudi female labour participation



Early evidence of continued spending on megaprojects¹³ amidst the recession of 2020 in Saudi Arabia points to a potential social dilemma: the choices of government-funded projects do not reflect the demands of job creation for citizens, nor the geographies of their needs. In short, the COVID-19 pandemic combined with a "lower for longer" oil price and demand outlook make the diversification agenda both more critical to achieve, and less likely to succeed.

Global cities in the desert: the challenge of sustainability

Andrea Tobia Zevi

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Cities have been flourishing during the past three decades. It is well-known that starting from the beginning of this century the urban population has globally overtaken that of the countryside, and this represented a revolutionary turning point in the history of humankind. Covering just 3% of the earth's surface, metropolitan systems are currently home to 55% of human beings (a percentage expected to increase dramatically in the next 20 years). They are also responsible for about 60% of greenhouse gas emissions and 70% of solid waste, while consuming around 70% of global energy. In addition, they produce almost three quarters of the global GDP and set cultural, economic and political trends. As early as the Nineties, sociologist Saskia Sassen explained that some cities should be described as "global cities": they are nodes within the global and financial economic network, interacting between them more than with the surrounding "fly-over" regions. Inside global cities, social inequalities are staggering.

Gulf cities provide interesting examples of "global cities": Abu Dhabi, Dubai and Doha, to mention but a few, have been so far the symbol of a transnational business elite and a luxury way of travelling. "Starchitects" from Europe and North America designed amazing skyscrapers, buildings and new neighbourhoods, while prestigious cultural institutions (museums like the Louvre, or universities like New York University) established local branches in the region. At the opposite end of the social spectrum, low-skilled and low-wage expatriates from Africa and Asia - have been living in poorer conditions. In 2019 migrant workers represented 88% of the global population in the

United Arab Emirates (UAE).¹ At the beginning of 2020, COVID-19 suddenly appeared on the global scene. Faced with this emergency, the question for Gulf cities, as for every global city in the world, has now become the following: what will remain the same and what needs to change in order to shape an environmentally, socially and economically sustainable future?

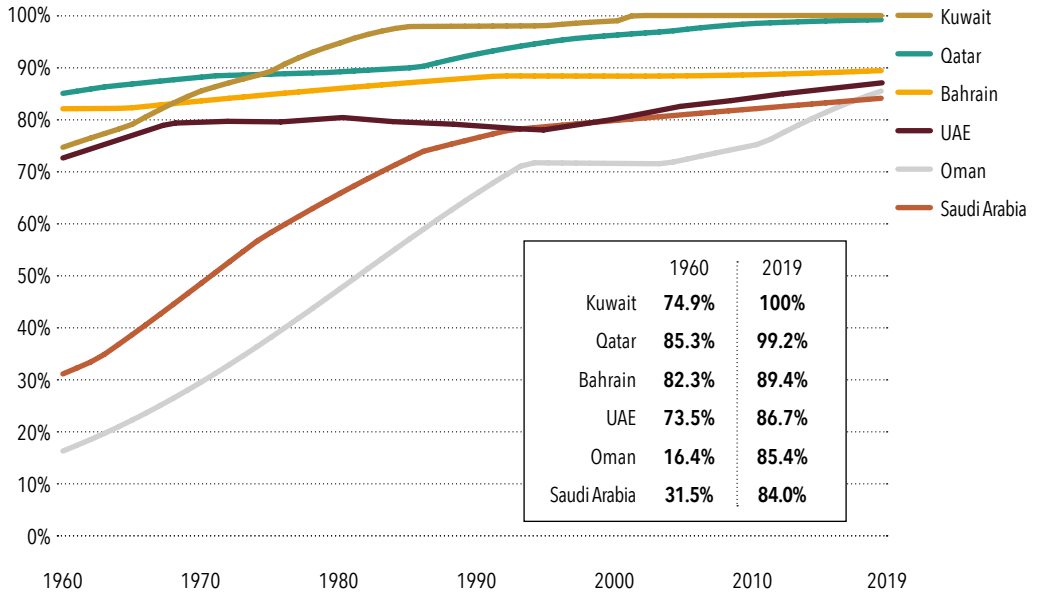
THE ECONOMIC CHALLENGE

In the Twentieth century, oil was of course the main source of income for Gulf economies, and their incredible wealth allowed for huge investments in the area and abroad. Recently, the governments of the Gulf Cooperation Council (GCC) started defining and implementing ambitious "Visions" in order to transform their countries' economies. Cities lie at the heart of these strategies since the region is highly urbanised (accounting for 100% of Qatar's population and 90% of Bahrain's). At the metropolitan level, this new economic paradigm rests on three main pillars: ICT; tourism and international events; construction and real estate. What does the future look like in those three fields?

ICT will surely increase its economic centrality, and therefore it will remain an important asset for Gulf cities. As noted, GCC countries were already investing heavily in this sector: in 2016 Saudi Arabia launched a vast digitisation programme, according to "Vision 2030", which ranged from education to healthcare, from transportation to energy. In the UAE around 95% of houses are equipped with optic fibre and broadband connections. Ambitious projects concern "smart cities" to be built from scratch – such as Neom in Saudi Arabia and Lusail in Qatar – and translated into efforts to de-

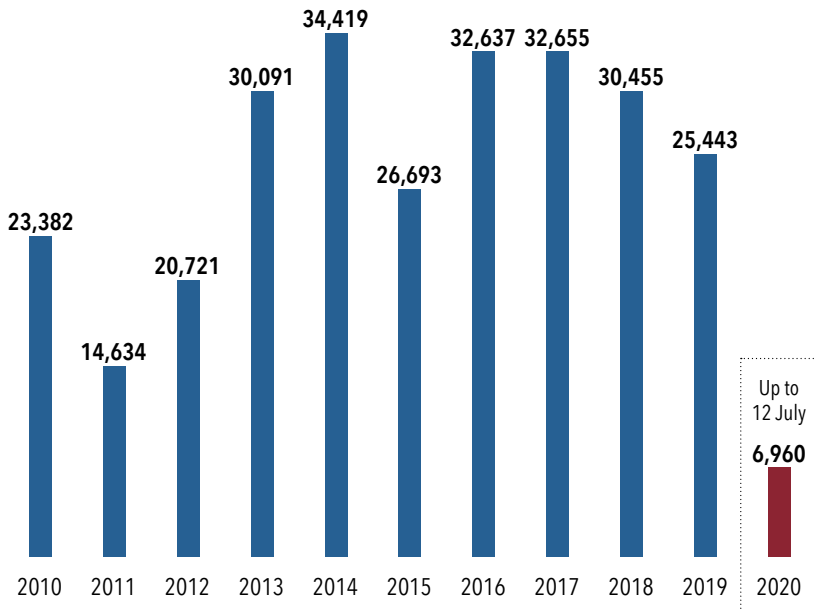
THE GULF: MORE AND MORE URBANISED

Urban population growth in Gulf countries



COVID-19 IMPACT ON UAE'S CONSTRUCTION AND TRANSPORT SECTORS

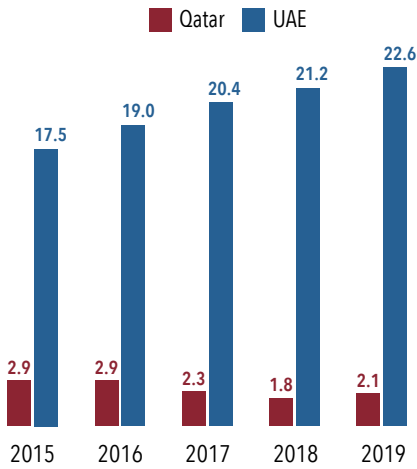
UAE construction and transport contracts (\$ millions)



Data: World Bank; MEED

HOLIDAYS IN THE GULF

International tourists in Qatar and UAE (millions)



Data: World Tourism Organization

fine a new urban dwelling concept, although the implementation of such projects has encountered obstacles and delays. Moreover, in the age of COVID-19, technology becomes vital for contact tracing to prevent and contain the spread of the virus. As Israeli scholar Yuval Harari pointed out recently, however, these developments require proper management: for Gulf cities, as for any other global city worldwide, the goal is maximising the potential of ICT without jeopardizing privacy and civil rights.

Secondly, tourism has been crucial for the region's economies. Dubai welcomed around 17 million tourists in 2019,² a figure initially expected to increase to 25 million by 2025.³ In the UAE, leisure and tourism generated revenues totalling \$64 billion in 2016 and accounted directly and indirectly for around 600 thousand jobs in 2017.⁴ Ambitious projects concerning tourism-related infrastructures and facilities were under way before the pandemic. According to the World Tourism Organization (WTO), however, international tourism in 2020 will drop by about 60-80%, which means a loss of around \$800 billion.⁵ To put this in perspective, consider that previous crises led to a 4% decrease in 2009 (coinciding with the financial crisis) and just 0.4% in 2003 because of the Sars

pandemic.⁶ Worldwide tourism - a sector that accounted for about 10% of the global GDP in 2017, but even more relevant for Gulf economies - has now collapsed. International events also need to be completely reinvented in the years to come. Experts wonder how international gatherings will be economically sustainable given the expected lower number of visitors, and this question is crucial for Gulf cities as well. The Expo Dubai, to be inaugurated in 2021, and the 2022 FIFA World Cup in Qatar - the two most important events that will take place in the region in the near future - will not attract as many people as originally anticipated. A different business model is therefore required to take into account the effects of the COVID-19 pandemic. Nevertheless, tourism will remain a fundamental pillar of the Gulf cities' economy of the future. But everywhere in the world tourists will be more careful while choosing a travel destination: hospitals and healthcare facilities, as well as clean air and social inclusion, will weigh in heavily when booking a trip or buying a ticket.⁷

As regards the construction sector, the COVID-19 pandemic has reinforced pre-existing negative trends driven by a lack of technology and market reduction. The number of construction and transport contracts awarded to the UAE has halved in 2020 compared to last year, and many companies are facing delays because of workers' health problems, supply chain issues and a scarcity of financial resources.⁸ Furthermore, remote work is gaining momentum globally, a new approach that could empty the bright skyscrapers owned by multinational companies. In order to avoid a real estate crisis, cities like Abu Dhabi, Doha and Dubai need to re-shape the luxury office-buildings inaugurated in recent years, and to carefully consider what kind of space will be more suitable to new hybrid and flexible working conditions.²

THE CHALLENGE OF SUSTAINABILITY: SOME IDEAS

In short, the question is: how can Gulf cities continue to prosper in light of the COVID-19 pandemic and the subsequent economic slowdown?

The collapse of oil prices has forced GCC cities to step up their pre-pandemic efforts towards post-oil economic diversification, and their ambitious "Visions" will require some major rethinking during and after the coronavirus. ICT, tourism and the construction sector will need to change dra-

matically in the years to come. To transform this crisis into an opportunity, Gulf cities should seriously take into account Agenda 2030 – especially goal no. 11 “Make cities and human settlements inclusive, safe, resilient and sustainable” – and adapt it according to the specific features of their economies, geography and social structure. In order to foster economic growth, protect the environment (which is particularly important in such extreme climatic conditions) and encourage human development, action should be taken in three main directions:

- **Urban regeneration:** instead of building new skyscrapers that could remain empty, it would be wise to focus on regenerating existing neighbourhoods and buildings (as was the case with Qasr al Hosn in Abu Dhabi),¹⁰ or to create integrated, mixed projects for tourists and residents (as was the case of Madinat al Irfan in the capital district of Muscat, Oman).¹¹ This would follow the “urban mending” trajectory that Italian architect Renzo Piano identifies as the most important goal for cities in our century;¹²
- **Sustainable tourism:** Gulf cities will remain a dream destination for a generation of interna-

tional travellers. However, to maintain their appeal after COVID-19, these large metropolitan areas will need to invest not only in technology and infrastructures, but also in healthcare and environmental protection;

- **Social inclusion:** low-skilled and low-wage expatriates should be included into a more just and efficient labour market. This would be part of the broader post-oil restructuring of labour markets.¹³ Recent laws reforming the sponsorship system (“kafala”) are promising, but they need to be actively implemented. For instance, in 2020 Qatar introduced a minimum wage for migrant workers (as Kuwait did in 2016), who can now change jobs before the end of their contract without their employer’s consent.¹⁴ From 2021 onwards, Saudi Arabia too will allow private sector workers to change jobs and leave the country without the employer’s consent.¹⁵ This reform path is likely to improve living conditions in poor neighbourhoods and disadvantaged areas, making Gulf cities more attractive for both local dwellers and international visitors. Will Gulf cities win the challenge of sustainability? Realistically, they certainly have all the means to succeed.

The geopolitics of gas in the Eastern Mediterranean

Gabriel Mitchell

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On 22 September 2020, the governments of Egypt, Cyprus, Greece, Israel, Italy, Jordan, and the Palestinian Authority signed a charter that officially declared the Eastern Mediterranean Gas Forum (EMGF) – a multinational body tasked with developing a regional gas market and mechanism for resource development – a formal international organisation. But due to coronavirus considerations, the ceremony was held virtually.

The signing ceremony's muted tone reflected the changing developments in the region. Although the EMGF's establishment represents a new chapter in Eastern Mediterranean politics, the discovery of offshore hydrocarbons aggravated regional tensions and disrupted the delicate balance of power. In particular, two developments dampened the celebratory mood. The first was Turkey's efforts to break the consensus within the EMGF and force its neighbours into direct negotiations over maritime rights. The second was the coronavirus pandemic, which indirectly flattened the global energy market, driving down natural gas prices, and freezing exploratory projects across the region. These challenges are outwardly different, but require similar degrees of flexibility from Eastern Mediterranean states if they hope to chart a common path in the coming years.

REGIONAL COOPERATION AND ITS DISCONTENTS

Offshore natural gas fields were first discovered in Israel's waters in 2009 and 2010, and later in the waters of Cyprus (2011) and Egypt (2015). The largest fields hold an estimated 122 trillion cubic feet of natural gas. Neither Israel nor Cyprus pos-

sess sufficient local demand for their reserves, so both the states and the developers sought commercially feasible export options. Two diplomatic processes took form: one between Israel, Cyprus, and Greece, and the second between Egypt, Cyprus, and Greece. These parallel diplomatic tracks served as the early beginnings of the EMGF that later included other actors like Jordan, the Palestinian Authority and Italy.

1,900 km

Projected length of EastMed undersea pipeline

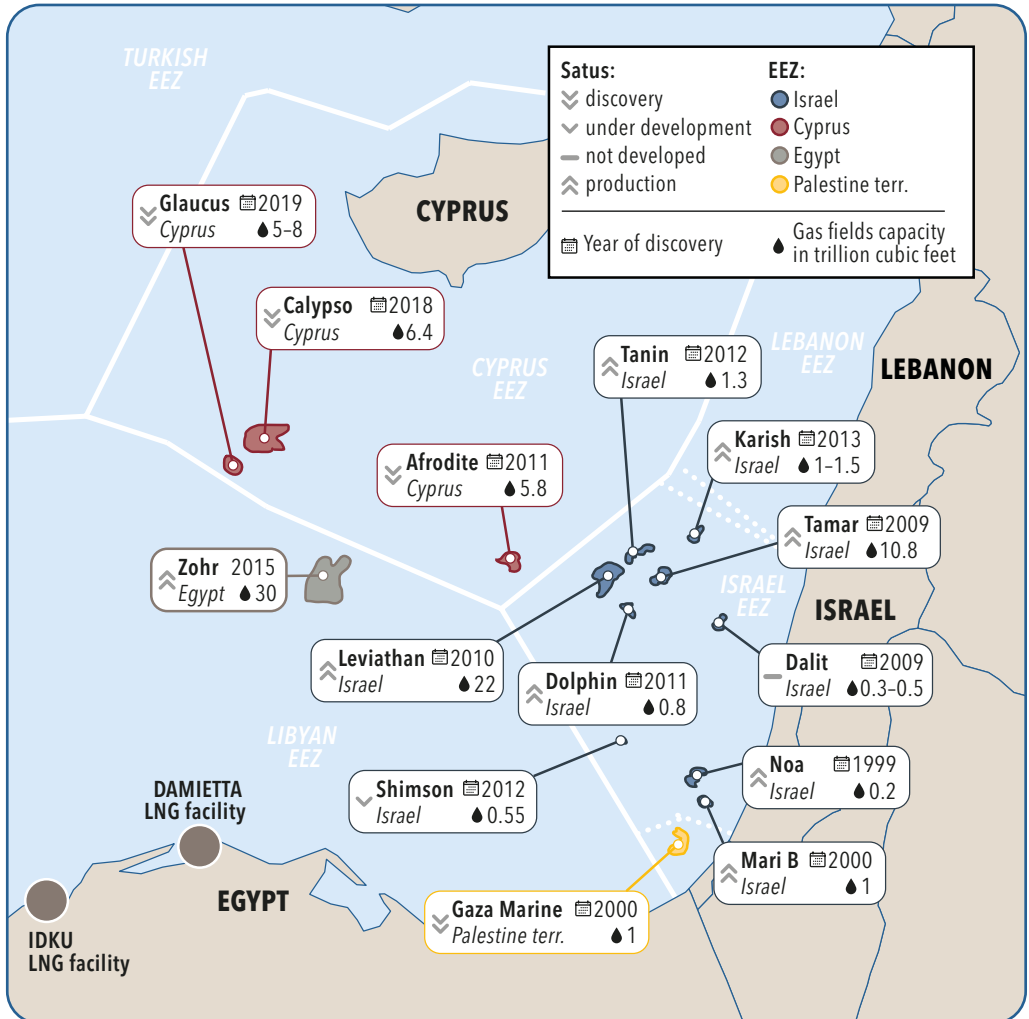


The trajectory of the region's hydrocarbons currently points towards Egypt. But alternative export options were evaluated. The ambitious "EastMed pipeline" – a 1,900-kilometer undersea pipeline that would carry Israeli and Cypriot gas to Greece and Italy – garnered significant international attention, but industry experts questioned the project's commercial feasibility. In 2016, Israel weighed the possibility of exporting gas to Turkey, which boasts a large domestic market and infrastructure connected directly to Europe. However, the parties could neither agree on a price nor overcome the political obstacles posed by the Cyprus crisis and Turkey-Cyprus maritime disputes. Some Eastern Mediterranean governments weighed the option of investing in floating liquid natural gas, but the quantities of hydrocarbons do not justify the investment.

Egypt was a sensible destination for the region's gas. Like Turkey, Egypt has growing domestic demand and operates liquified natural gas (LNG) facilities in Idku and Damietta that can

THE REIGN OF GAS

Gasfields and EEZ in the Eastern Mediterranean



Data: ISPI, MEES, ECFR, Israeli Ministry of National Infrastructure, Energy and Water resources, A. El Bassoussy, "East Mediterranean gas: a new arena for international rivalry", *Review of Economics and Political Science*, 2018, vol.3, n.2.

convert surplus gas to be sold on the global market. Egyptian leadership hopes these diplomatic processes will allow it to become a regional gas hub, creating jobs, increasing its own energy security, and offering President Abdel Fattah al-Sisi an opportunity to be seen as a regional leader. Not surprisingly, the EMGF is headquartered in Cairo.

But the pivot towards Egypt came at Turkey's expense; Ankara has long sought to become a

regional energy hub. Facing the prospect of strategic isolation, Turkey adopted the role of spoiler. It now embraces a strategic doctrine called *Mavi Vatan* (Blue Homeland) that calls for the defence of Turkey's continental shelf and territorial waters. In 2018, Turkey sent exploratory and drilling vessels into the waters around Cyprus. Then, Turkey established a formal partnership with the Government of National Accord in Libya, and in November 2019 the parties signed a maritime delimita-

tion agreement. The decision not only challenged the maritime understandings between Greece, Cyprus, and Egypt, but it also positioned Turkey against France and the United Arab Emirates, who have covertly supported General Khalifa Haftar's forces in eastern Libya. Even Italy, who shares considerable commercial interests with Turkey in North Africa, found it difficult to defend Turkey's tactics. Finally, in July and August 2020, Turkish seismic vessels and naval warships entered Greek territorial waters, sparking international criticism and several mediation efforts.

Turkey questions the legal claims of Greece and Cyprus in the Eastern Mediterranean. Rationally speaking, the parties should directly negotiate a new maritime boundary, however their long history of adversarial relations will likely prevent that scenario from playing out in the immediate future. Neither side wants to be perceived as conciliatory, as it would weaken their respective domestic position. Indeed, some have argued that Turkish President Recep Tayyip Erdoğan staged this summer's drama in order to distract his domestic audience from Turkey's deepening economic crisis. But Erdoğan also knows that the European Union and the transatlantic alliance are divided. The longer Ankara exerts pressure on its neighbours, the more likely international investors get cold feet and the EMGF loses credibility. Until now, the EMGF has proven ill-equipped to respond to Turkey's test. But the game of brinkmanship that Ankara is playing has toughened its neighbours' positions and increased the prospect of conflict.

THE DEEP IMPACT OF COVID-19

If the infighting between regional actors was not enough to curb the hype surrounding Eastern Mediterranean energy cooperation, the coronavirus pandemic all but finished the job. In a matter of weeks, the pandemic altered the global energy market. Many of the Eastern Mediterranean's future projects are suspended for the coming year and international companies have scaled back their activities. In Israel, where local prices are currently between 2.5 and 3 times the global average, the Israel Electricity Authority is forced to import LNG at half the price of domestic supply. Egypt froze operations at one of its LNG terminals, and cut production at Zohr field.

There are divergent opinions as to whether low natural gas prices are the new normal or whether they will rebound. Some argue that low prices could continue as other projects around the globe come onto the market. Projects that demand investment in costly infrastructure will find it difficult to compete with existing LNG providers and the up-and-coming renewable energy industry. At the same time, the International Gas Union's annual report suggests that prices could experience an uptick in the coming months as industrial activities recover in Europe and Asia and the world prepares for winter under the shadow of coronavirus restrictions.

3%

Expected fall in natural gas
global demand in 2020
(120 billion cubic metres)



One storyline that offers a glimmer of hope for the region's commercial fortunes is Chevron's purchase of Noble Energy. The American multinational energy corporation will inherit 25% and 39.66% of Israel's two largest fields, Tamar and Leviathan, respectively, as well as a 35% stake in Cyprus' Aphrodite field and a minority share of the pipeline presently delivering Israeli gas to Egypt. Already in possession of exploration rights in multiple Egyptian blocks, Chevron's purchase of Noble Energy makes it one of the most important commercial players in the Eastern Mediterranean. According to Chevron executives, the motivation to purchase Noble Energy's assets was driven by a desire to acquire "low-capital, cash-generating offshore assets". So, despite the supermajor's political and commercial strength, it may not announce its plans until market conditions improve.

The pandemic created an opportunity for state and commercial actors to reassess their plans, and it may have saved Eastern Mediterranean states from making some ill-advised investments. As part of its post-pandemic strategy, the EMGF should aim to keep much of the region's gas local. This means that EMGF member states need to commit to diversifying their domestic infrastructure and economies to be more gas friendly. It will also require deliberations between international companies and EMGF member states in order to find language that suites all of the invested parties. The EMGF could also help foster a regional

market by diversifying its mission to incorporating the renewable energy industry.

A NEGOTIATED FUTURE?

Now that the pandemic has moderated some of the more bullish prognostications, there is no better time for the region's actors to take advantage of the moratorium and commit themselves to diplomacy, conflict management, and conflict resolution.

The United States should be encouraged to play a role in regional negotiations. Not only is Washington the preferred mediator for many of the regional conflicts, but American support for the development of offshore hydrocarbons and regional cooperation in the Eastern Mediterranean has benefited from bipartisan support during the Obama and Trump administrations (and presumably the Biden administration). An engaged US policy could help develop deconfliction mechanisms, encourage European and Eastern Mediterranean partners to develop cooperative strategies, and discourage interference from outside actors like Russia, Iran, and China. The recent decision by Washington to station the USS Hershel Williams, an expeditionary sea base, at the Souda Bay port in Crete may signal America's intention to help keep the peace.

But realistic expectations must be set. While the Eastern Mediterranean is a strategic asset to the US, it is Europe's backyard. The US can play a supporting role, but the primary responsibility falls on regional actors, the European Union, and NATO. A best-case scenario for Turkey and Greece might be NATO's recently mediated deconfliction mechanism. As member states in the transatlantic alliance that enjoy full diplomatic ties, re-establishing red lines is a basic expectation that could allow for more fruitful conversations in the future. However, if the parties are unable to commit themselves to the process then Europe's leading states must find a way to resolve this matter.

Other regional issues require mediation as well. US State Department officials announced in late September 2020 that Lebanon and Israel had agreed to resolve their outstanding maritime

issues in direct negotiations. Crippled by a combination of sanctions, COVID-19, and the deadly blast in Beirut, Lebanon's fragile government is desperate for a win. A resolution to the disagreement would encourage international companies to explore in Lebanese waters and perhaps open the door to its future participation in the EMGF. Efforts are also being made to broker a deal in Libya.

122 trillion

Estimated gas reserves in the Levant basin



What role should the EMGF play in these processes? The forum's mission is to address matters of energy cooperation, but in a post-COVID reality it could serve as a platform for discussion on other issues, from tourism to environmental protection, from pandemic support to renewable energy cooperation and cybersecurity. Could EMGF members states – in consultation with the European Union and United States – present a balanced offer to Turkey that facilitates both an end to hostilities and a more integrated model for regional cooperation? At the moment it sounds far-fetched. Still, accepting the forum's limitations now may set its ceiling too early, and in doing so prevent it from reaching its full potential. Like the European Coal and Steel Community, the EMGF could theoretically make conflict in the region “not merely unthinkable, but materially impossible.” Despite the Eastern Mediterranean's many internal issues, the opportunity to use economic cooperation as a vehicle to reduce conflict remains.

The past year has presented stern tests to those who believed energy would pave the way for cooperation in the Eastern Mediterranean. For the region to maximise the opportunities of the post-coronavirus era, EMGF states – with international support – must maintain their commitment to economic cooperation while also prioritising conflict resolution and the establishment of a new maritime order. Failure to address these challenges may undermine the collaborative work of the past decade.

6 SHARED PROSPERITY

The food security challenge

Eckart Woertz

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and University of Hamburg

The Middle East and North Africa (MENA) region is the world's largest importer of cereals: wheat, rice, corn, and barley mainly. It also imports large amounts of dairy and poultry products as well as sugar and oilseeds. The region would face a massive food security problem without such imports from the world's agricultural powerhouses in Eurasia, North and South America. This is a geopolitical vulnerability, comparable only to the dependence of industrialised nations on oil imports, which they perceive with equal preoccupation at times. What if sanctions, war, or COVID-19 disrupted such trade flows? What if climate change undermined the export capacities of trading partners? What if oil income dwindled and with it the ability to pay for food imports?

BEYOND WATER SCARCITY:

MAIN THREATS TO FOOD SECURITY

Such worries are not merely theoretical, but have materialised historically on a number of occasions. During World War II, famines in the region were averted only by rationing and the adoption of production measures by the Allied Middle East Supply Center in Cairo. During the 1960s and 1970s, the United States politicised the food trade. Subsidised food exports to Egypt were cut to bring Nasser in line, and the threat of a food embargo was used in retaliation to the Arab oil boycott. In the 1990s, Iraq's food imports plummeted because of sanctions. More recently, food exporters such as Russia, Argentina, and Vietnam implemented export restrictions during the global food crisis of 2007-08 out of concern for their own food security. This prompted governments in the MENA

region to launch initiatives for improved self-sufficiency, but there is simply not enough water (see map on the next page). MENA countries belong to the most water scarce regions of the world, and only Central Asia and parts of South Asia, China, the south west of the US, southern Spain, and the south east of Australia face water challenges of similar magnitude. Since the 1970s the MENA region has failed to produce its required food from renewable water resources. Population growth has widened this gap over the years.

13th/113

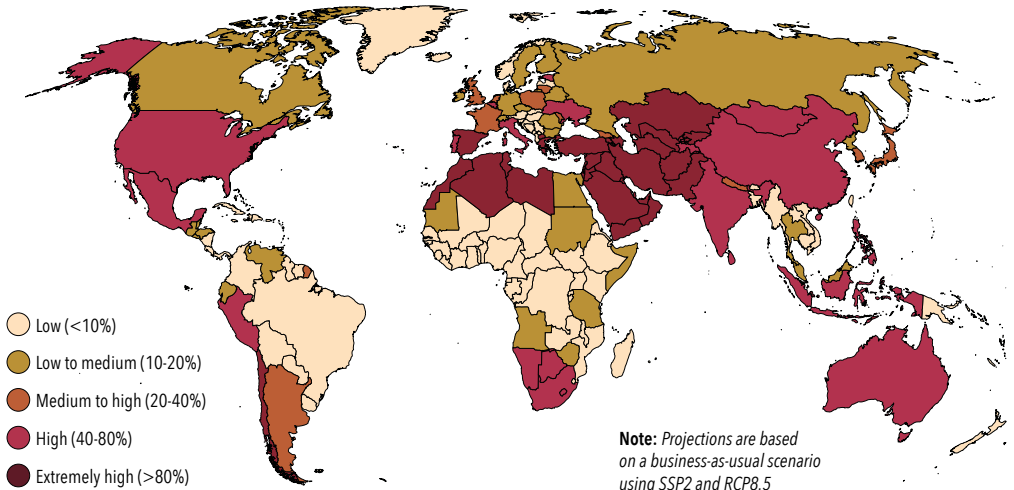
Qatar ranking
in the Global Food
Security Index



However, food security in many MENA countries is surprisingly good, not only in terms of food availability – which is conditioned by import and production capacity – but also of food affordability and safety, the latter being two other constituting sub-items of the index that are influenced by socio-economic inclusiveness, governance, and consumer awareness. The most water scarce countries with the highest food import dependence, that is the Gulf states and Israel, actually have some of the best rankings in the Global Food Security Index by The Economist Intelligence Unit. Qatar is the highest-ranking MENA country. It ranks 13th globally (out of 113 countries in the index) and its 81.2 index value is not far behind the best ranking country, Singapore, which scores 87.4 and is also heavily dependent on food imports. It would appear that food security is not threatened so much by water scarcity, but rather by conflict in countries such as Yemen, Sudan, and Syria that rank at the

WATER STRESS BY COUNTRY: 2040

Ratio of withdrawals to supply



Source: World Resources Institute

bottom (111st, 107th and 99th respectively) or by lack of economic access to food by vulnerable population segments such as the poor or migrant workers.

Food trade has mitigated water scarcity in the region. Food accounts for the large majority of water withdrawal in the world (ca. 70%) and even more for consumptive water use (ca. 92%). That is because much of the water withdrawn for agriculture is for evapotranspiration of plants and can only be used once in a given hydrological cycle. In contrast, other withdrawn water (e.g. for cooling a power plant or taking a shower) is still available for further use downstream, possibly after recycling. Thus, by importing food MENA countries effectively obtain what is known as “virtual water”, that is the water that was used to produce a commodity and is virtually embedded in it. The virtual water trade has added a second Nile river to the water balance of the region, but has gone almost unnoticed. As about 70% of global food production is rain-fed and not irrigated, the MENA region effectively benefits from rainfalls in faraway places via food trade. A drought in a major exporter nation such as Russia, the US, or Australia can be more

dangerous for food supplies than a drought at home, at least in those countries that have limited agricultural potential.

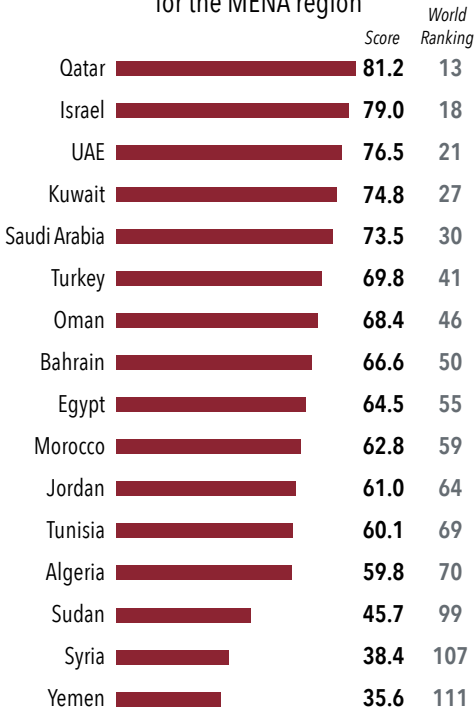
ONE CHALLENGE, DIFFERENT APPROACHES

While the basic challenge is the same, there are major differences between various MENA countries. The largest reliance on imported calories exists in Israel, Jordan, and the Gulf countries. Two MENA countries, Turkey and Morocco, actually have an agricultural surplus in monetary terms because of their booming exports of fruit and vegetables, while still relying on net imports of calories via the grain trade. Similarly, Tunisia has developed into a major exporter of olive oil. Egypt is the world’s largest wheat importer and faces tough choices. It has decided to cut down water intensive cultivation of cotton while maintaining a certain level of domestic wheat production to limit import dependency.

In the lower Euphrates and Tigris basin, Syria, Iraq, and Iran have also pursued strategies to achieve at least a degree of grain self-sufficiency. The expansion of semi-irrigated wheat cultivation in often fragile steppe ecosystems has led to soil

FOOD (IN)SECURE?

Global food security index: scores and rankings for the MENA region



Iran, Iraq, occupied Palestinian terr., Libya: data not available

Data: Global Food Security Index- Economist Intelligence Unit

erosion and to a depletion of aquifers. Turkey's dam building and exploitation of the Euphrates-Tigris waters for its booming agricultural export sector as well as drought and the growing domestic demand have prompted farmers in Syria and Iraq to take recourse to groundwater abstraction. Water tables have been sinking at astonishing speed.

(e.g. Saudi Arabia) and surface water resources are limited (e.g. Egypt). In other cases, they were not an option in the first place because water scarcity is too pronounced and arable land limited (e.g. Israel, Jordan, Lebanon, Yemen).

The water crisis can be observed all over the region. Politicians have reacted with three kinds of measures: (a) trying to increase water supplies, (b) making water use more efficient, and (c) cutting back water-intensive crops. The first approach is the intuitive and easy one, but has largely run its course. Surface water supplies are limited and the attempts of hydro-hegemony like Turkey and Egypt to maintain their hold can only go that far. Building dams to preserve run-off water is helpful in some regions, but it is hardly a silver bullet in terms of magnitudes. Groundwater abstraction, often from fossil water aquifers with no or very low recharge rates, can make up for the deficit in renewable water supplies for a period of time. But this strategy has come with considerable ecological cost in the form of sinking water tables. It has already forced the Gulf countries to change course and countries in the Mesopotamian basin might face a similar day of reckoning soon. This leaves the option of desalination. It has become crucial for the provision of residential water supplies in the Gulf countries and Israel. With the Red Sea-Dead Sea Canal project, Jordan is also joining the desalination club. However, desalination is very costly and energy intensive. It is therefore an option only for the richer countries of the region, it is economically prohibitive for extensive agricultural cultivation, and the disposal of its brine can be ecologically damaging.

This leads to the second option: making agricultural water use more efficient with the help of modern technology – “getting more crop for each drop”. Israel introduced drip irrigation in the 1960s and 1970s and today grows double the output with half of the water. In the 1990s it expanded the use of treated wastewater and brackish water in agriculture. However, water consumption continues to grow in absolute terms, not only because of economic and population growth, but also because of so-called rebound effects. These occur when efficiency gains are used to expand production. Because of such rebound effects, water consumption in Morocco actually increased after the introduction of drip irrigation!



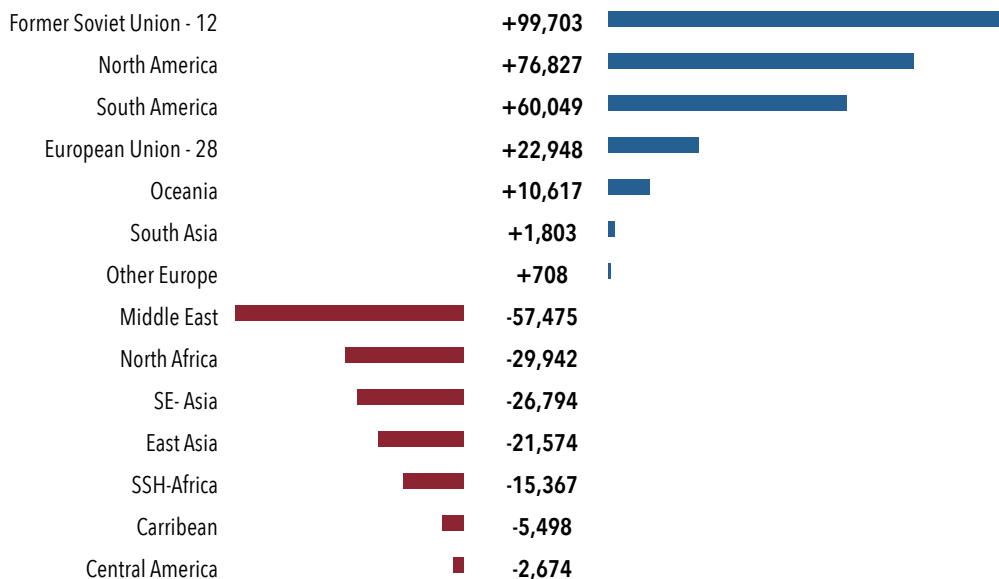
Size of revenues from Tunisia's olive oil exports compared to the national budget

4.25%

Between 2003 and 2009 freshwater supplies the size of the Dead Sea disappeared from Mesopotamian aquifers according to a NASA study based on satellite imagery. Grain programmes are tenuous because of water scarcity (Iran, Iraq, Syria), or had to be phased out as aquifers face depletion

GLOBAL FOOD MARKET

Net food trade by world region, 2019-20 (in 1,000 metric tons)



Data: USDA

FOOD TRADE AS A NECESSITY

Hence technology alone will not be a magic solution. Trade-offs between domestic food production, water security, and water use are on the rise in other economic sectors that are vital for economic diversification, such as services and industries. MENA countries will need to weigh the opportunity costs and base their decisions on such calculations. The realisation that food trade is unavoidable has already sunk in: it is the present and future of food availability in the region. Rather than trying to avoid import dependence altogether, MENA countries will have to manage it proactively.

The initial thrust of rich oil exporting countries after the global food crisis a decade ago was a rush to acquire farmland abroad, often in food insecure countries such as Sudan, Ethiopia, and Pakistan. These investment announcements were mostly not successful for a variety of reasons (e.g. logistics, know-how, corruption, oil price declines, and political instability) or only materialised on a fraction of the initially announced scale. Ten years

later, they do not make a meaningful contribution to the huge food imports of the MENA countries.

12.8 million

Wheat imported by
Egypt in 2019/20
(in metric tons)



What has proven to be much more important is the management of downstream value chains in food trading, processing, and distribution, mostly in developed agro markets with an established track record of food export capacity. Saudi state-owned company SALIC and international grain trader Bunge took over a majority stake in the former Canadian Wheat Board for example, while other investments were made in Argentina, Australia, and Ukraine. Considerable influence could also be leveraged at multilateral institutions such as the World Trade Organisation (WTO) and G20 to make international food trade more dependable. To trade or not to trade food is not the question anymore; it has become a necessity.

3

The image features a large, bold, white number '3' centered on a teal background. The background is decorated with faint, light teal circular patterns, including concentric circles and overlapping arcs, creating a subtle geometric design.



MIGRATION

1

MIGRATION

Migration trends in the Mediterranean and the COVID-19 pandemic

Matteo Villa

Research Fellow, ISPI

Irregular sea arrivals to Italy are up this year. By mid-November, Italy had recorded more than 30,000 migrant arrivals at its shores, a number that is higher than in 2018 as a whole (23,370),¹ and almost three times that of last year. Wasn't the COVID-19 pandemic supposed to deter irregular as well as regular migration? Think again. Along the Central Mediterranean route, two forces appear to have been at work, acting as an incentive for migrants to depart from both Libya and Tunisia. And while the pandemic has had its effect, it was not the one many expected. Italy offers an interesting case study to evaluate the effects that the COVID-19 pandemic is having on regular and irregular migration along the Mediterranean routes.

COVID-19: THE (UN)EXPECTED DISRUPTION

It is unquestionable that the pandemic has had a disruptive effect on regular migration flows. We still do not know the exact figures, but we can rely on projections and economic models to make a rough estimate. For starters, any economic downturn has a significant effect on regular migration, deterring movement as recession discourages international migration for work purposes. However, a global recession as the one induced by the pandemic can also have the opposite effect, since shrinking incomes in origin countries may push potential migrants to migrate towards destinations where people are better off despite the recession. Therefore, the economics of regular migration suggest that the expected effect is ambiguous at best. Irrespective of the economic angle, in practice most advanced countries have put in place travel bans for large parts of 2020.

In spite of a number of exceptions, notably for seasonal workers or cross-border commuters, migration has been hindered or outright prohibited especially from emerging and developing countries towards advanced economies. To gauge the extent to which this has been the case, the figure on the next page shows air traffic flows in Europe in 2020 compared to 2019. As the graph indicates, air traffic all but disappeared in April 2020 (-88%), only to recover slowly over the summer months, but by November it remained subdued (-57%) and was still declining as the second wave of infection gripped Europe.²

30,000

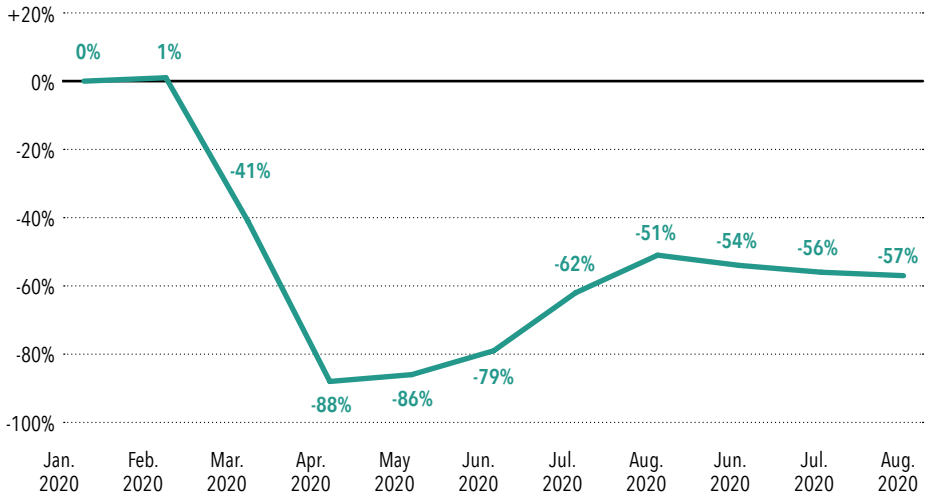
Number of migrant arrivals at Italian shores from January to mid-November 2020



As for irregular migration, as mentioned, irregular arrivals to Italy are up this year. However, this rise in irregular sea arrivals should be viewed in a wider context. Using forecast models, we expect irregular sea arrivals to Italy to approach but be slightly lower than 35,000 by year end. This figure would be significantly higher than the 19,000 arrivals recorded between 2002 and 2010, just before the popular revolts in Tunisia and Libya in 2011 brought close to 65,000 migrants to the country's shores. But 35,000 arrivals annually is also around 80% lower than 170,000 ca. which is the number of persons who reached Italy irregularly by sea each year on average between 2014 and 2016 (see figure on page 75).³ The bottom line is that, in fact, the period of high irregular arrivals to Italy ended more than three years ago, and what we are doing today is trying to explain an increase

AN AERIAL PERSPECTIVE OF THE PANDEMIC

Air traffic in Europe in 2020, compared to 2019



Data: Eurocontrol

concerning numbers that are significantly much smaller. We might call it a “mini-surge” in irregular arrivals along the Central Mediterranean route.

DISSECTING THE MINI-SURGE

The decline in sea arrivals has one single explanation at its core: fewer migrant departures from Libya. This can be explained by the two-pronged action by the European Union (EU) and Italy in order to deter irregular migration from other African countries towards Libya, and then from Libya onwards towards Italy and Malta through the dangerous sea route. The launch in 2015 of the European Agenda on Migration was coupled with the Trust Fund for Africa, and with the attempt to make EU aid and cooperation more and more conditional on the African origin and transit countries’ compliance with international migration governance policies. African countries were asked to accept more returns of irregular migrants, an attempt that largely failed: in 2019, European countries returned 26,535 persons to Africa, just 6% more than the 25,045 persons they returned in 2014, the year before the approval of the European Agenda on Migration.⁴ However,

26,535

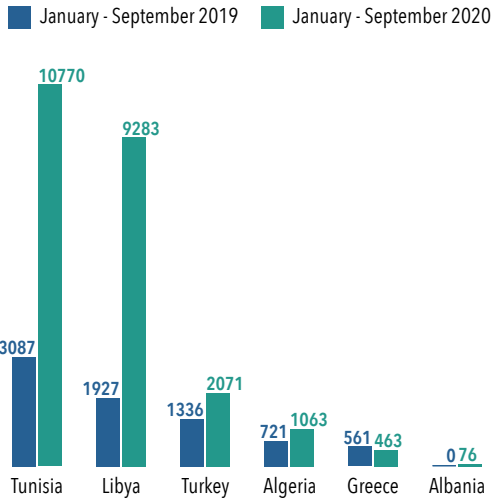
Number of persons returned to Africa by European countries in 2019



a few “priority” African origin and transit countries, most notably Niger, were asked to help deter irregular migrants from transiting across their territory, and they did. The Displacement Tracking Matrix of the International Organization for Migration recorded 333,000 migrants moving from Niger towards Libya or (much less frequently) to Algeria in 2016, but just 69,000 in 2017 - almost an 80% decrease.⁵ The second part of the strategy was more straightforward, and involved cooperation between the EU and Libyan authorities, in particular empowering the Libyan Coast Guard and avoiding to denounce smugglers that were detaining migrants for longer periods rather than sending them at sea. This brought about the largest change in irregular sea arrivals to Italy ever recorded: starting from mid-July 2017, in the span of a few months irregular sea arrivals dropped by almost 75%, from a yearly average of 195,000 in June 2017 to around 52,000 in June next year.⁶

WHERE FROM?

Irregular sea arrivals to Italy by country of embarkation



Data: UNHCR

In 2020, two factors contributed to the mini-surge in irregular arrivals and these concern the increase in the number of refugees and so-called economic migrants alike. As regards refugees, the situation had already deteriorated well before this year's pandemic. In Libya many had been living in dire conditions, in or around detention centres, or in dilapidated urban dwellings. It is therefore not surprising that last March, at the height of the pandemic in Italy, many migrants and asylum seekers in Libya still regarded crossing the Mediterranean as a better option than remaining home. As Italy went into lockdown and sea arrivals dropped to a trickle (just 241 migrants landed on Italian shores in March – an 80% decline compared to February), almost 1,300 migrants departed from Libya over a 31-day period. And while most of those who left Libya were brought back by the so-called Libyan Coast Guard, the fact that attempted arrivals continued almost unabated despite the coronavirus hitting Italy hard and deterring departures from all other sea routes speaks volumes about the living conditions of migrants and asylum seekers in the North African country. In the first nine months of this year, sea arrivals to Italy from Libya were al-

most 5 times higher than in 2019 (see figure on the next page).

The second factor concerns the economic and mobility effects of the pandemic in Tunisia. For years, Tunisia has been plagued by chronic unemployment and an unstable social and political environment. The closure of borders has dealt a terrible blow to a country largely supported by tourism – which accounts for around 8% of the country's GDP and employs 400,000 workers, or 10% of the total workforce² – jeopardising the slow recovery that followed the terrorist attacks on popular tourist destinations of 2015. Indeed, according to the latest official statistics, tourist arrivals in Tunisia dropped by close to 100% in the months of April through June.³

-80%

Decline of migrant arrivals to Italy in March 2020 (first month of lockdown) compared to February



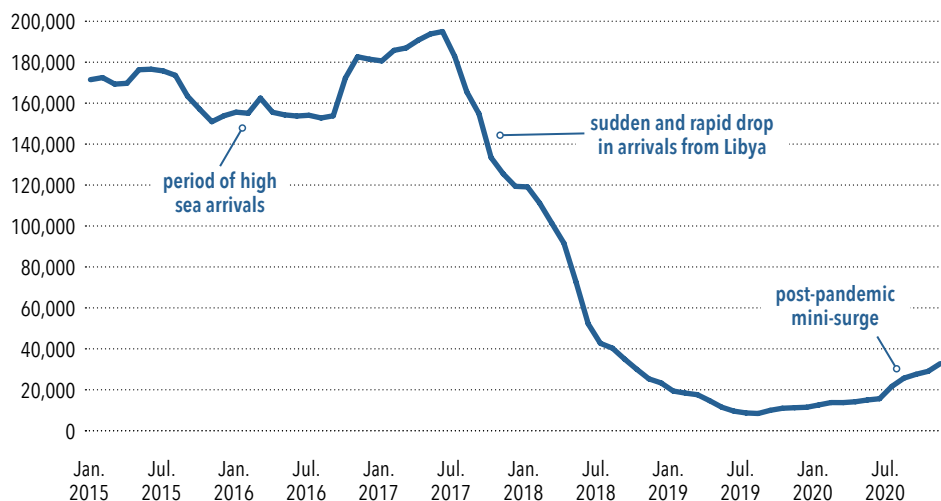
At the same time, tens of thousands of Tunisian seasonal migrant workers found themselves stuck in the country, unable to reach Europe to make a living. While likely more short-term than the plight of migrants in Libya, developments in Tunisia have been the main driver of this summer's mini-surge in sea crossings. In July and August, irregular sea arrivals from Tunisia made up around two thirds of total arrivals to Italy. This is a stark reversal if compared with the period of high sea arrivals to Italy (2014-2016), when around 90% of those who reached Italy's shores had departed from Libya, while Tunisia accounted for just 5% of the total. And whereas irregular sea arrivals from Tunisia have always been fairly composite in terms of nationalities, this year Tunisian citizens made up over 92% of boat passengers.²

EXPECT THE UNEXPECTED

In conclusion, the mini-surge in irregular sea arrivals to Italy is an interesting case study that highlights the complexities of the pandemic shock on migrants' decisions to attempt to reach Europe irregularly. First, it shows that in countries that are sufficiently close to Europe, expectations of "involuntary immobility" have been largely exaggerated. While this appears to be a crucial issue for those living further away from developed countries, especially in Sub-Saharan Africa, in many

THE DECLINE OF IRREGULAR MIGRATION

Irregular sea arrivals to Italy (12 months moving average)



Data: Eurocontrol

instances migrants in countries sufficiently close to Europe actually have not only the motivation, but also the means to cross the Mediterranean. Second, the mini-surge shows how hard it continues to be to predict trends in irregular arrivals, as sudden variations can reverse previous trends in a matter of months or even weeks. Had arrivals from Tunisia followed the same seasonal trend as in 2019, we could have expected around 15,000 irregular arrivals to Italy by year end – i.e., around 60% less than the 35,000 that we are expecting now. Third, and most important, the mini-surge shows that the COVID-19 pandemic has had a

10%

Share of Tunisian workforce employed in tourism, a sector severely affected by the pandemic



wealth of different, if not entirely unexpected, effects on short-term migration movements that should be further investigated. But long-term migration drivers such as demographic trends, economic opportunities, family and social networks abroad will continue to shape the willingness to migrate in the future, whether regularly or not. Even in the post-pandemic world.

Irregular migration and Libya: is the crisis over?

Nancy Porsia

Freelance Journalist and Consultant Researcher

Libya is one of the natural gates of Africa into Europe, a role that was never a deliberate choice on the part of either the Libyans or the migrants heading north. For the latter, Western policies on migration have always ruled out a safe passage or a regular visa to Europe or the USA as an option. As a result, thousands of women and men have come to Libya to flee famine or war and to attempt to secure a better future for themselves in Europe – which has turned into a profitable business for some Libyan groups. This was the case under Muammar Gaddafi's rule and remains the case today, long after the demise of the Libyan dictator, while the conditions for migrants transiting through Libya have drastically changed since the Colonel was ousted in 2011.

In war-torn Libya, rival factions compete for political legitimacy and the militias that flourished in the aftermath of the 2011 revolution are fighting to gain control of the territory. Today Libya is split in two administrative areas, oil production has been repeatedly halted by clashes between the warring factions, and 392,241 people are internally displaced due to the enduring armed conflict. Water and power cuts often last up to five days, and Libyans are exhausted. Petrol, subsidised since Gaddafi's times, would cost only 15 cents of a Libyan dinar per litre on the official market, but for the last five years it has been available only on the black market where the price hits two Libyan dinars per litre.

At the same time, the liquidity crisis of the Libyan banking system prevents Libyans from accessing their own money. Fuel, water, cash and every other commodity on the Libyan market have fallen under the control of criminal organisations. Even

migrants have become a commodity like any other on the market. The prosperous illegal business was soon infiltrated by pre-existing criminal networks like the Nigerian and Sudanese ones. This transnational criminal enterprise has led to a sort of *industrialisation* of human smuggling that has resulted in peak numbers throughout the Libyan conflict. And yet, Europe and Italy persist in their *securitarian* approach regardless of the Libyan context and the absence of a state there.

BUILDING THE MEDITERRANEAN WALL

Since the beginning of 2020, about 11,295 migrants have reached the Italian shores from Libya on dinghies packed well above capacity via the Mediterranean,¹ double the number of those recorded in the same period of the previous year. Although the number of people who have reached Italy by sea since the beginning of 2020 is still far lower than arrivals recorded on Italian shores between 2014 and 2017, the analysis of available data suggests some complications may have occurred on the ground.

9,448

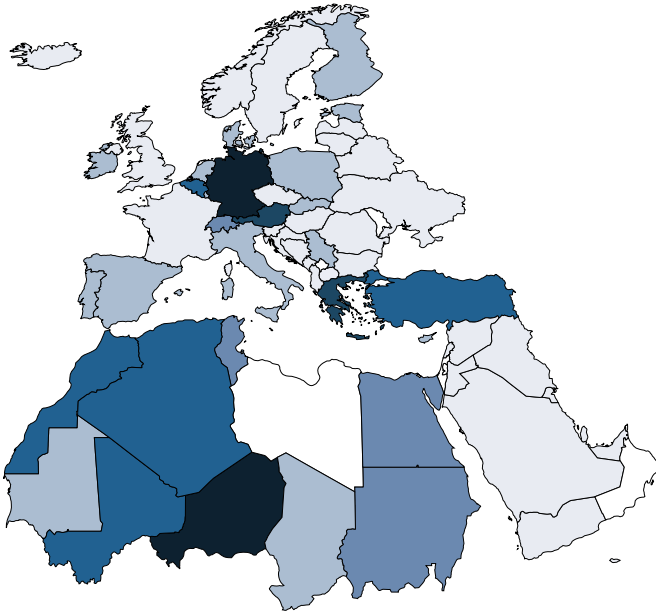
Migrants pulled back by Libyan Coast Guard since the beginning of 2020



Regardless of the questionable legitimacy of the Libyan authorities in power, in January 2015 the EU Interior Ministers set up a special fund to financially support Libya as a country of transit for migration. The stated goals of the funds were to protect the most vulnerable persons, to promote the stabilisation of Libyan communities and to assist the Libyan authorities in controlling their borders.

GOING BACKWARDS

Assisted voluntary returns by host country in 2019



Top countries

Niger	16,400
Germany	13,100
Greece	3,900
Austria	2,800
Turkey	2,500
Belgium	2,200
Morocco	1,400
Mali	1,400
Algeria	1,000
Egypt	904
Tunisia	630
Sudan	559
Switzerland	531
Mauritania	444
Poland	443
Finland	406

Data: IOM Database

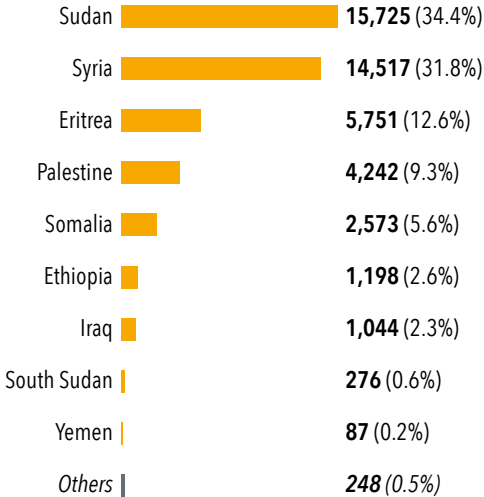
Furthermore, in February 2017 the former Italian Interior Minister Marco Minniti and Fayed al-Sarraj, President of the UN-backed Libyan Presidential Council, signed a Memorandum of Understanding that tied Italian financial support to Libya to cooperation in curtailing irregular migration in the Central Mediterranean. In August of the same year, Minniti agreed to grant additional funding to benefit the Libyan municipalities, for the purpose of promoting social stabilisation. The militias inside the Libyan national security apparatus and involved in human smuggling were among the beneficiaries of foreign funding allocated to Tripoli to stem irregular migration. In fact, in Libya militias represent the backbone of the national security apparatus. In the aftermath of the 2011 revolution, previous revolutionary brigades turned into militias and

were absorbed by the following interim government.

To be sure, the militias on the payroll of the Libyan Ministries of the Interior and Defence have been vying for control over irregular migration flows into and from the country. Meanwhile, Italian warships reached the port of Abu Setta in Tripoli to assist the Libyans in their offshore patrolling at sea, but it was Libya's maritime forces that were put in charge of the Search and Rescue (SAR) zone in international waters. In July 2018, Italy went back to enforcing the Friendship Treaty signed in 2008 to provide additional funding to their Libyan counterparts in exchange for their commitment to patrol the southern European borders. It is estimated that since 2017 Rome alone has allocated about €784.3 million to Libya, of which 22.1 million on the Libyan coast guard.² These figures take on new meaning

WHO'S ASKING FOR ASYLUM IN LIBYA?

Registered refugees and asylum-seekers in Libya by country of origin



Data: IMF World Economic Outlook database

when considering that since its establishment in November 2015, the EU Emergency Trust Fund for Africa – Europe's main tool for actions intended to support migration-related initiatives in Libya – has so far allocated €455 million to projects in Libya, bringing total funding to Libya from 2014 to 2020 to around €700 million under various instruments.³

This strategy bore fruit fairly quickly. In the three years since the deal between Italy and Libya in 2017, at least 60,000 migrants have been intercepted at sea and returned to Libya: 45,000 out of 85,894 persons who left the Libyan shores heading to Europe since then till October 2020. The annual average of migrants intercepted at sea and brought back increased to 55% per year from the mere 6% recorded in 2015 and 27% in 2016,⁴ even if by absolute numbers the data decreased.⁵

Meanwhile, non-governmental organisations (NGO) engaged in Search and Rescue (SAR) operations off the shores of Libya were hampered in their efforts and even accused of participating in human trafficking. In the same period, the death rate along the central Mediterranean migratory

route significantly increased, from an annual 2% in 2016 and 2017 to over 6% in the following years,⁶ even though the yearly averages of the persons who were reported dead at sea before and after the “first drop” of Italian externalisation policy decreased from 4,049 to 1,168.⁷

THE ENDLESS GAME

During the sixteen-month offensive on Tripoli launched in April 2019 by General Khalifa Haftar to unseat the rival UN-backed Government of National Accord (GNA), the full-fledged war in and around the Libyan capital prompted a disruption of both the human smuggling chain and the system previously in place in western Libya. An officer working for the Department of Counter Irregular Migration (DCIM), that reports to the Interior Ministry of Tripoli, who also is a member of a militia in Tripoli, declared in an interview last February: “The armed conflicts in Tripoli partially disrupted the smuggling routes. There are checkpoints around the city, so it is not as easy to get through as it was before. However, due to my work as a DCIM officer, I have good connections with all the parties involved in the smuggling of human beings, and we can still coordinate. Sometimes I have migrants transferred from the prisons to the checkpoints on DCIM buses to avoid questions along the way.”⁸

€784.3 mln

Amount allocated by Rome to Libya since 2017



In Zawiya, a coastal city 50 km west of Tripoli, the local coast guard unit is allegedly involved in human smuggling. Migrants intercepted at sea are sent to Al Nasr detention centre in town, thus skipping registration with the UN High Commissioner for Refugees (UNHCR). Held in secret cells at this governmental facility, those migrants face torture and all sorts of inhumane treatment for extortion purposes.

Beyond the endemic corruption inside Libya's institutions to facilitate human smuggling, infighting among local powers has also undermined the Italian strategy to control migration flows through the Central Mediterranean. While Libyan maritime personnel, assisted by Italian forces in the port of Abu Setta in Tripoli, has continued to operate, the dynamics of power have become even more

complicated. Offshore Coastal Security reporting to Interior Ministry and Libyan Coast Guard controlled by Ministry of Defence compete for control over the operations of interceptions of illegal migrants at sea. In fact, the control of the borders has become the main asset for the Libyan stakeholders to gain national recognition and international funds. Since the beginning of 2020, the Libyan Coast Guard has pulled back 9,448 migrants, marking a 30% increase compared to the same period of the previous year.² However, as of 18 September, there were about 2,400 migrants in the eight Department of Counter Illegal Migration (DCIM) detention centres throughout the country according to UNHCR, which has led international organisations to raise concerns over the fate of those missing.¹⁰

During General Haftar's offensive on Tripoli, senior officers of the Interior Ministry refused to arrest and detain migrants as a sign of protest against the difficult conditions they had been forced to work in by their foreign partners. In the aftermath of the July 2019 massacre in the Tajoura prison, where 53 migrants lost their lives under the bombs of General Haftar, the Interior Minister Fathi Bashaga ordered the closure of three DCIM detention centres. In response to worsening security conditions during Haftar's offensive on Tripoli, the Libyan authorities often released migrants upon disembarkation, as reported by the UNHCR and the International Organization for Migration (IOM).

On 30th January 2020, amid rising safety concerns, the UNHCR also suspended operations at the Gathering and Departure Facility (GDF) in Tripoli, the only facility that was active in the country as a safe haven for persons deemed vulnerable.

As soon as the dust settled in Tripoli following the retreat of the armed forces led by General Khalifa Haftar in July 2020, the number of migrants reaching Italy by sea from Libya doubled. The NGOs involved in the SAR missions have been proven not to be a push factor in the migrants' decision to take their chances on this journey. In fact, for the last two years, NGOs

have almost disappeared from the SAR zone in the Central Mediterranean due to the halt imposed by European institutions.

A HUMAN RIGHTS CRISIS

Before pouring money into Libya and striking the deal with the Libyan Coast Guard, Europe and Italy likely knew that this would not be sufficient to definitely stem the migration flow. However, back then the goal was to actually gain time while the fate of the country remained unclear. Five years later, the situation on the ground has not changed, rather the Libyan conflict has recently escalated from a regional proxy war to an international conflict between Turkey and Russia. Turkey, as was the case in March 2020 along the southern Greek border, might soon wield the threat of massive migrants flows from Libya towards Italian shores as a weapon to redress the power balance in negotiations with Europe. This might lead to a new peak of arrivals to Italy and cause a new crisis for Europe and Italy.

53

Migrants who lost their lives during the attack on Tajoura Detention Centre (July 2019)



However, for the migrants stranded in Libya, the crisis that started in the aftermath of the 2011 revolution has never ended. It has been 10 years now since thousands of women, men and children left their countries looking for a better future away from famine or war only to suffer the systematic torture, rapes and killings perpetrated not only by criminals but also by security authorities who are the final beneficiaries of European and Italian funds. Those who manage to survive the systematic violence inside the DCIM prisons or the traffickers' connection houses, are then pulled back by the Libyan Coast Guard at Europe's request. Once back in Libya, they are likely to be held long-term across the country in arbitrary detention without formal charges and to be sold again to traffickers. Therefore, the flow of migrants across Libya and Central Mediterranean is a human crisis that needs to be addressed.

3 MIGRATION

EU-Turkey: towards a new deal?

Daniele Albanese
Caritas Italiana

The 5th anniversary of the EU-Turkey agreement in March 2021, which marks a turning point in the management of migratory flows and more generally for the relationship between the two regional powers, will come at a time of turmoil, pandemic and fear. In this scenario it is crucial to understand the bases for the construction of a renewed agreement considering historical relations rooted in functional cooperation.¹

A CONTROVERSIAL DEAL: EU-TURKEY COOPERATION IN THE FIELD OF MIGRATION

The European acquis on migration and asylum has been clearly visible in Turkish migration and asylum legislation and procedures since the mid-2000s, when it became a precondition for accession to the European Union.² As several policy studies recognise,³ this influence led to a transparent and rights-based approach in the enforcement of a technocratic and relatively apolitical migration governance strategy, even if the process itself implies the contradiction of viewing Turkey as a “buffer state”.⁴

The war in Syria has changed the routes of regional human mobility and consequently impacted the Turkish asylum system, but efforts to comply with EU requests have continued. The adoption of the Law on Foreigners and International Protection (LFIP) in 2013 affirmed Turkey's obligations towards all persons in need of international protection,⁵ regardless of their country of origin, accompanied by the creation of the Directorate General of Migration Management (DGMM) as the agency responsible for migration and asylum.⁶

Against this backdrop, between 2013 and 2015 Turkey responded to the Syrian influx as part of the ongoing democratic and human rights transition. Syrians were admitted and settled in accommodation centres. In October 2014 the adoption of the Regulation on Temporary Protection guaranteed Syrians access to education, work and medical care, consolidating their legal basis of residence in the country.⁷ However, the deterioration of the war in Syria and the increase of Syrian refugees under Temporary Protection in Turkey – from 14,000 in 2012 to 2.5 million in 2015⁸ – had an explosive effect both internally and externally. Internally, it fuelled the debate on security, particularly in the wake of the failed coup of July 2016, the bombs in Istanbul and Ankara, and the unsolved tensions with the Kurds. The tightening of migration policies led to stricter border controls and closures and stepped up militarisation initiatives like the construction of the 764 km wall along the Syrian border. Externally, all eyes in Europe stared in shock at the picture of the lifeless 3-year-old Alan Kurdi.

764 km

Length of the separation wall
along the Turkish-Syrian border



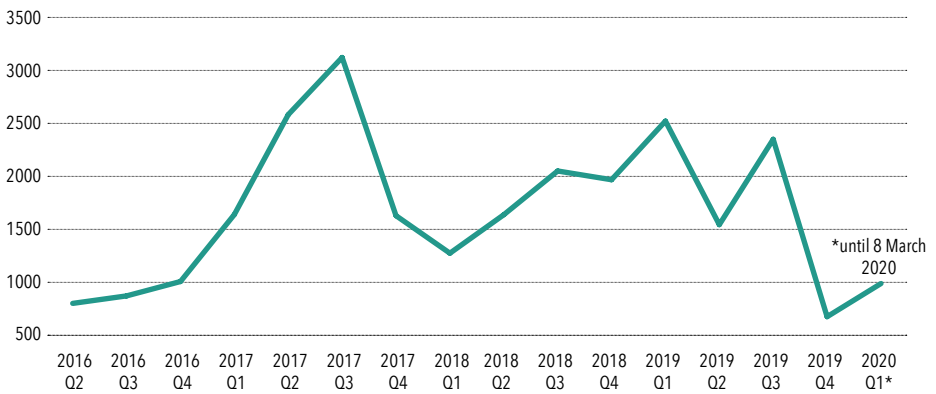
Germany's decision to keep its borders open and allow the entry of about 1 million Syrians through the Balkan route was followed by a confused European reaction that failed to define a common stance. The Schengen Agreement wavered under the pressure of temporary border closures, the Common European Asylum System remained solely on paper, the Visegrad block's position stiffened and the Dublin Regulation tipped

DESTINATION: GREECE AND TURKEY

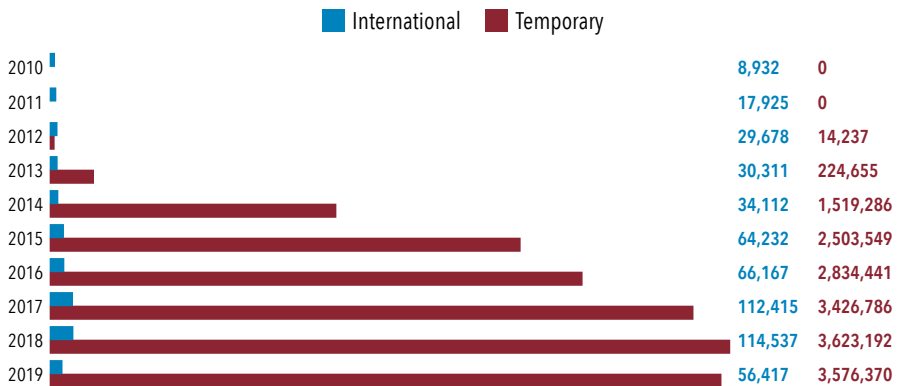
Number of sea and land arrivals in Greece



Number of resettlements from Turkey to the EU after the agreement



Number of international protection applications and temporary protection permits in Turkey



Data: UNHCR; European Commission; DGMM

the balance of burden disparity against border countries with no follow-up to relocation promises. In this scenario, the focus quickly shifted from the “refugee crisis” to the “solidarity crisis”, while the ascent of xenophobic parties all over Europe became more and more blatant. The only apparent common point among EU member states concerned external policy approaches and the willingness to control borders at any cost, which translated into the EU-Turkey Agreement signed on 18th March 2016.

The EU-Turkey “deal” is a pragmatic compromise dictated by mutual interests. The pact rests on a number of concrete principles: to stop irregular migration from Turkey to Europe, to improve the living conditions of refugees in Turkey, and to expand safe and legal pathways to the EU through the introduction of the one-for-one Resettlement Scheme and the Visa-Free Movement programme for the Turkish population. In reality, the results are at best ambivalent.

The drop in arrivals by sea since the day of the signature is undoubtedly the most relevant consequence of the agreement: from 856,000 arrivals in 2015 to 29,000 in 2017.⁹ However, the resettlement scheme was never properly implemented and only 27,000 Syrians (as of May 2020) have been resettled so far. The visa liberalisation measure, intended to sweeten the Agreement pill for the general population, is no longer credible since it has been openly disregarded. Humanitarian support programmes, however, have proven more effective. The budget earmarked for the EU Facility for Refugees in Turkey amounts to €6 billion: up to now, €4.7 billion have already been assigned but only €3.7 billion have been effectively disbursed. According to the EU monitoring report,¹⁰ humanitarian support has an important impact on the refugees’ livelihood conditions providing for their basic, educational and health needs. The fact remains that these expenses cover only a small part of the €35 billion that Turkey invested in refugee accommodation and integration, which explains the rising controversy around global burden sharing and “the deal” itself.¹¹

THE LATEST DEVELOPMENTS: RENEGOTIATIONS STILL UNDER WAY

Nevertheless, this pragmatic cooperation should not be taken for granted. This is particularly true

considering what happened in February-March 2020, right before the coronavirus outbreak in Europe, when the escalation of the conflict in Idlib (Syria) threatened a new mass influx of 950,000 Syrians into Turkey. President Recep Tayyip Erdoğan reacted by announcing that he would be “opening the doors” to Europe in search of more support, since Turkey remains the largest hosting country in the world with 3.6 million of Syrian refugees on its territory, to which we add hundreds of thousands of refugees from other nationalities. This immediately brought an estimated 25,000 migrants to the western border, who met with a firm Greek response and mounting evidence of pushbacks¹² in addition to the suspension of temporary asylum applications.¹³ A few days after the events, a meeting between Erdoğan, Ursula von der Leyen and Charles Michel marked the beginning of the renegotiation of the EU-Turkish Agreement, where leaders reiterated their commitment and vowed to improve its terms in view of the stock-taking scheduled for March 2021.

€6 billion

Total amount earmarked for EU Facilities for Refugees in Turkey



The outcome of this first negotiation phase is however extremely controversial. All migrants have been evacuated from the border area on the Turkish side while in Greece the situation has been worsening even further, especially on the islands where almost 40,000 asylum-seekers are stranded even though capacity remains at around 6,000.¹⁴ Eleven European countries voluntarily launched the prompt resettlement of unaccompanied minors (pledging to take in 1,600)¹⁵, while the Greek authorities announced the extension to 40km of the 12.5km barbed-wire fence built in 2012 on the land border with Turkey. In June, the EU Commission proposed to release a payment to top up support to Turkey with an additional €485 million.

These facts provide a glimpse into the terms and conditions that the new migration deal may contain as the surrounding context evolves. First of all, EU-Turkey migration governance, characterised by a mix of externalisation policies, humanitarian efforts and security management,

has to take into account the socio-legal implications of the emerging categorisation leading to differentiated inclusion of migrant groups.¹⁶ The efforts of the past few years have made Turkey not only a transit but a destination country, where integration appears possible, especially for Syrians. Meanwhile, an increasing influx of non-Syrians seem eager to leave the country because of worsening living conditions, weak legal status and differences in language: among them are the Afghans, who constitute the second-largest group registered in the country.¹⁷ Last March there were migrants from 29 different nationalities trying to reach the border.

While the deal was met with some disapproval, it undoubtedly provided a basis for cooperation. Practical considerations will probably be the guiding principle of renegotiation. However, several challenges make the future hard to predict. In 2019 Amnesty International documented¹⁸ the forced return of Syrian nationals to Syria by Turkish authorities, a clear violation of international human rights. The rationale of the action is to relocate refugees and to set up a so-called demilitarised “safe zone” along the border. In 2020-21 the situation may further deteriorate in the wake of the economic crisis, which represents a severe blow for refugees. Moreover, in 2015 the attention and the emotions of the whole world were drawn to the Syrian situation, while today European public opinion is struggling with the internal pandemic and its socio-economic consequences.

The different political scenario in which the renegotiation game will play out is another important factor. While for the time being the question of EU accession has been put on the backburner (and may dilute in the future into a matter of externalised differentiated integration), Turkey faces tensions in the Mediterranean concerning its presence and power (as a NATO member) as well as concerns over the Libyan conflict, drilling issues in the Aegean sea, and terrorism containment. On the EU front the political landscape has changed too, with the right-wing Greek government unwilling to support asylum policies, a drastic drop of international protection rates¹⁹ and the reduction of accommodation facilities for refugees.²⁰ In Brussels the new EU Commission, that is slowly getting back on its feet after

the first European lockdown, is working to build the pillars of the new migration and asylum pact, trying to “put Dublin to bed”²¹, to quote the Commission Vice President Margaritis Schinás.

3.6 million

Number of Syrian refugees registered in Turkey



The long-awaited proposal will introduce a faster screening process, flexible solidarity to member states (hinged on receiving asylum seekers, sponsoring returns, or providing logistic support), strengthened external borders and a reinforced partnership with non-EU countries for repatriation. The pact seems to offer a compromise that consolidates the rationale that has guided EU migration policies until now. The strategy will be based on preventing arrivals and enforcing border controls and deportation, regardless of protection needs and more generally of making the asylum system actually work. The explicit reference to externalisation with the aim to allow migrants to remain in their own countries and the attempt to encourage returns through agreements with countries of origin and transit will probably be the backdrop of renegotiation with Turkey as well.

WHICH FUTURE FOR THE EU-TURKEY PARTNERSHIP?

In this framework, a strategic post-crisis EU-Turkey partnership is likely going to be based on interdependence. Will Europe be able to overcome the dichotomy of interests and values? Will soft power be applied to contain Turkey’s threatening leverage of using migrants as a bargaining chip? Will the Global Compact on Refugees signed by Turkey and all EU member countries (except Hungary) provide a framework? These are the questions that must be answered. What is certain is that promising financial aid will not be enough to convince the Turkish people and Europe’s civil society. Complex situations could be addressed with a multilevel approach (not limited to hard power and militarisation) where a mixed use of more refined diplomatic resources, development and trade policies might become push factors for everyone, both member states and Turkey, to act for the collective good without accepting compromises that would jeopardise the respect of human rights.

4 MIGRATION

Internal displacement and children's psychosocial needs in Syria and Iraq

Silvia Gison, Laura Kivela, Orlaith Minogue,
Miya Tajima-Simpson, Amjad Yamin, Anne Mitaru
Save the Children

Almost 45.7 million people globally are internally displaced.¹ Internally displaced people (IDPs) have not crossed an international border to find refuge but they have remained inside their home countries and they are legally under the protection of their respective governments.² There are approximately 11.7 million people in need of humanitarian assistance in Syria, including 5 million children.³ Child protection, education, shelter and food are the most critical humanitarian needs experienced by people across the country.⁴ Syria, after more than ten years of conflict, hosts 6.2 million IDPs, including 2.5 million children: the largest internally displaced population in the world.⁵ Between January and July 2020, approximately 1,590,000 displaced people moved across Syria, thousands every day,⁶ 91% of them within and between the governorates of Aleppo and Idlib (northwest Syria). These movements were mainly driven by conflict dynamics and the need to access livelihood opportunities and basic services.

Almost three years after the declaration of the end of the war against the Islamic State of Iraq and Syria (ISIS),⁷ more than 1.38 million people including 648,000 children⁸ remain internally displaced in Iraq in the northern and western parts of the country.² Ninety-two percent of the displaced population have been displaced for three or more years.¹⁰ With over 4.7 million returnees, including 2.2 million children¹¹ seeking to rebuild their lives, secondary displacement happens with individuals and families not being able to achieve sustainable solutions in the areas of their return, integration or resettlement, therefore forcing them to move again. The scarcity or absence of

public services was the most commonly cited reason, alongside lack of security, no job opportunities/financial means and the destruction of houses.¹² The limited access to civil documentation, the threat of unexploded ordnance and other difficulties reduce the opportunity for children to get back to their lives¹³ and make it extremely difficult for young people to regain a sense of safety and security.

2.1 million

Number of
Syrian children
out of school

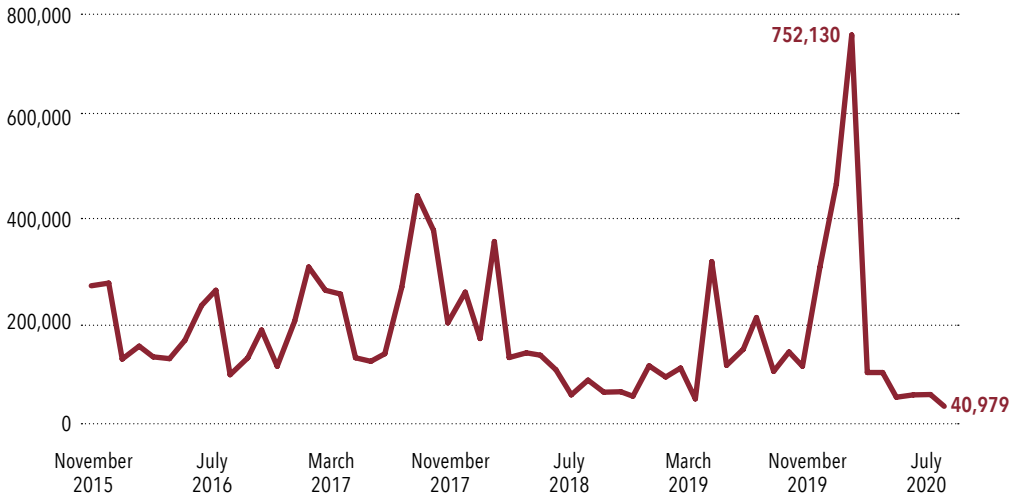


THE PSYCHOSOCIAL CONSEQUENCES OF DISPLACEMENT IN SYRIA

The level of violence and insecurity across Syria, the spread of chronic malnutrition¹⁴ and disruption to education has resulted in an entire generation of children in Syria experiencing a major disruption in their physical and cognitive development. Their ability to learn is thus undermined, with long-lasting negative impacts on their physical and mental health, as well as productive opportunities for the future.¹⁵ Every Syrian child had seen his or her wellbeing and development threatened¹⁶ but, depending on their age, gender and developmental stage, the displacement and the "psychosocial" impact of what was experienced differs greatly.¹⁷ "Psychosocial" is a term used to describe the intertwined relationship between psychological and social processes that continuously interact with and influence one another. In the context of the conflict in Syria, children may have been born into displacement, or may live

SYRIAN INTERNALLY DISPLACED POPULATION

IDPs in Syria – Monthly trends (2015-2020)



Data: OCHA

their adolescence in an environment where their parents and communities do not feel at home. Displacement can impact Syrian children's psychosocial safety in many ways, including:

- Economic hardship and limited opportunities:** 2.1 million children are out of school and an estimated 1.32 million more are at risk of dropping out or not learning in the near future.¹⁸ Two-thirds of Syrian children live in extreme poverty¹⁹ and, with the new measures linked to the COVID-19 pandemic, their opportunities to return to normality decrease by the day. Girls are at greater risk of early and forced marriage while boys, on the other hand, are at higher risk of recruitment²⁰ and harmful forms of child labour outside their home. These negative trends have long-lasting negative impacts on children's physical and mental health, self-esteem, and productive opportunities in the future. Syria's displaced children and families need a holistic approach to address their basic safety needs to be able to achieve the psychosocial safety they require.
- Traumatic events:** Since the beginning of the conflict, most Syrian children have witnessed,

heard about or lived through traumatic events²¹ linked to severe incidents, as bombings and shelling, or to deprivation and violence at home. There is no one way to react to traumatic events and memories from those events can be heavily influenced by genetics, gender, age, personal history, family and support systems. A trauma-informed approach can be beneficial to intervention for mental health and psychosocial support for Syria's displaced children.²²

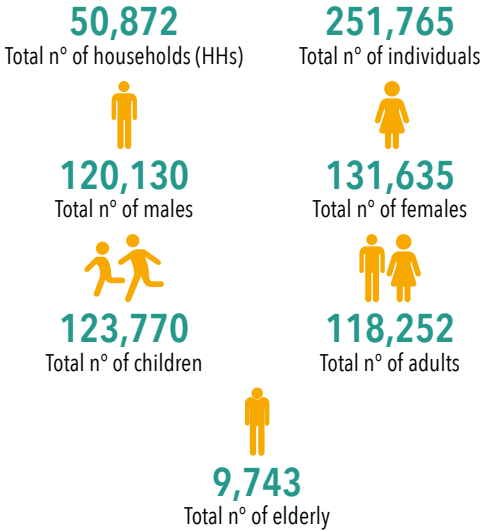
29,000 Number of children victims of the Syrian conflict



- Grief and loss:** Approximately 227,000 civilians, including 29,000 children were killed since the beginning of the conflict.²³ The death of a loved one or the separation from friends and family can influence relationships and have a life-long impact on a child's development.²⁴
- Diminished community and peer support:** Syria's internally displaced children are often unable to connect to others due to mobility limitations, which weaken their support networks and social interaction. Peer-to-peer interaction

IRAQ CAMP POPULATION

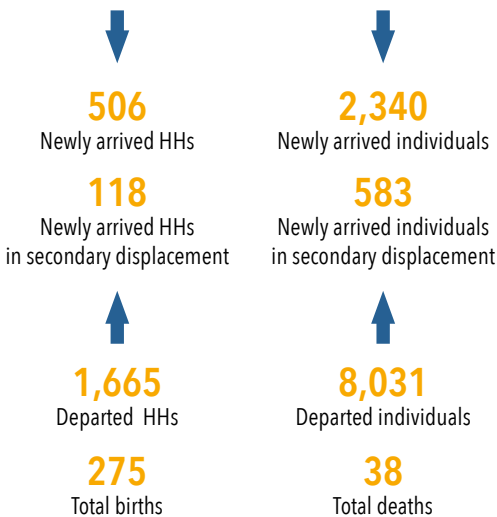
Demographic situation in IDPs' camps in Iraq
(as of September 2020)



VULNERABLE HOUSEHOLDS



SEPTEMBER 2020



Data: UNHCR

and family connectedness are greatly important for children's psychosocial safety and this is particularly true during displacement. When children experience displacement, they have to deal with efforts to integrate into a new environment; at times such as those, having friends and family who cope well with change can be hugely useful.²⁵

• **Discrimination related to displacement:** Syrian IDPs may live in host communities they differ from in terms of religion, political affiliation or ethnicity. These differences may lead to hostility, social and communal tensions and the risk of "othering".²⁶ Some children living in these conditions have to grapple with their minority status and the stress linked to the political conflict, with potentially severe impacts on their physical and psychological health.

• **Identity development:** It is during adolescence that children start to develop their identity through cultural, ethnic or national affiliation, so discrimination during this period can be particularly harmful.²⁷ Displacement for these young people may not be seen as part of their identity as it is "normal" for them.²⁸

• **Diminished agency:** The Convention on the Rights of the Child identifies children as rights holders, and they have the right to express their views and to be heard in decision-making processes that affect their lives.²⁹ Yet many of Syria's displaced children have been shut off from opportunities to have a say on their future and that of their country.³⁰

THE PSYCHOSOCIAL CONSEQUENCES OF DISPLACEMENT IN IRAQ

Living through conflict has a devastating impact on children's wellbeing, and compromises their social, emotional and cognitive development. In Iraq, children who lived under ISIS control, or who have lived the war to defeat ISIS, experienced and witnessed acts of extreme violence.

96%

Share of Iraqi parents with no support concerning the psychosocial conditions of their children



Many endured the sudden deaths of loved ones, separation from family members, homelessness, and severe disruption to their education

and support networks. Children who escaped to displacement camps have faced ongoing stressors associated with living in cramped temporary accommodation, with limited access to education, healthcare, safe recreational spaces and mental wellbeing. According to a survey,³¹ many children are expressing signs of severe distress, including nightmares, loss of speech, increased bedwetting, and increased crying, screaming and aggression. Further studies found high-levels of psychosocial distress among girls and boys, with 41% reporting trouble sleeping, 45% experiencing nightmares, and 31% reporting feelings of fear or anxiety on a weekly basis.³² 83% of adolescents felt unsafe walking alone, 75% felt unsafe at school, and almost 50% felt unsafe whenever they were away from their parents.³³

Conflict and displacement crises also impact the wellbeing of parents and caregivers, often compromising their ability to adequately care for their children. The economic hardship faced by conflict-affected adults increases their children's vulnerability to child marriage and exploitative labour.³⁴ Parents reported very low levels of confidence in dealing with psychosocial problems among children, particularly problems such as aggression, self-harm and substance misuse. 96% of parents reported that there was nowhere they could go for support when they had concerns relating to their child's emotions or behaviour.³⁵

CONCLUSION AND KEY RECOMMENDATIONS

Ensuring that children are safe and secure enough to pursue their right to development, learning, and other opportunities regardless of their displacement histories, is fundamental for their attainment.³⁶ The reasons Syrian and Iraqi displaced children had to flee their home, due to violence, conflict or injustice, are strongly linked to the lev-

el of psychosocial safety they feel. A strong reconciliation process and a sustainable peace are fundamental for cultivating psychosocial safety for children, but a formal process toward peace in Syria remains elusive. The long-term peace and stability of Iraq depends on the wellbeing and development of its children - who account for more than half of the country's population - into healthy,

83% Share of Iraqi adolescents reporting feelings of unsafety




happy adults.

To ensure that displacement-affected children have access to a better future in which they can achieve their full potential, it is crucial to guarantee physical, legal, material and psychosocial safety. The international community and relevant key stakeholders must act now to:

- Integrate psychosocial safety as an important element in all durable solutions frameworks and discourse.
- Involve children in durable solutions planning.
- Support and expand existing family- and community-based support systems and mechanisms that bolster psychosocial safety for children by removing barriers to access.
- Prioritise the re-establishment of physical safety and security, food security and sustainable livelihoods, access to documentation, as well as reliable and non-discriminatory access to quality basic services to all populations.
- Promote mental health care as an essential component of healthcare overall.
- Hold perpetrators of violations against children to account, also by ensuring systematic tracking, monitoring and reporting of attacks on civilians and violations of children's rights.

4

The image features a large, bold white number '4' centered on a solid yellow background. In the background, there are faint, semi-transparent silhouettes of people, including a person in a dress and another person in a suit, suggesting a social or professional gathering.

The background is a solid orange color. In the upper half, there are several light orange circles of varying sizes, arranged in a grid-like pattern. In the lower half, there are stylized human figures in a light orange color, also arranged in a grid-like pattern. The text is centered and overlaid on the figures.

***CIVIL SOCIETY,
CULTURE
AND MEDIA***

Protesters' creative response to the COVID-19 pandemic

Georges Fahmi

Research Fellow, European University Institute (EUI)

Over the last couple of years, the MENA region has witnessed a new wave of popular uprisings. Sudanese, Algerian, Iraqi and Lebanese protesters have taken to the streets calling for political change. While Sudanese revolutionary forces reached an agreement with the military to share power during the transitional period, protests have continued in Algeria, Iraq and Lebanon until the COVID-19 pandemic broke out.

The impact of the pandemic on this second wave of Arab uprisings was initially adverse. The pandemic offered the political regimes in Algeria, Lebanon and Iraq the opportunity to put an end to all forms of popular mobilisation, including street protests and public political gatherings. The health measures enforced against the pandemic largely emptied the squares of Algiers, Baghdad and Beirut that had been packed with protesters since the beginning of the Algerian uprising in February 2019 and the Iraqi and Lebanese ones in October 2019, respectively. Moreover, security forces took advantage of the situation to arrest the most active figures of this second wave of the Arab Spring. For example, in Algeria the authorities have cracked down on several active voices of the Hirak, including Karim Tabbou – a prominent opposition figure – and Reporters without Borders (RSF) correspondent Khaled Drareni.

However, despite these repressive measures, the protest movements have so far succeeded in turning the COVID-19 challenge into an opportunity by adopting new tactics that have allowed them to continue their activities and that could even increase their influence once the health crisis is over. Their response to the pandemic has three

main characteristics: it is responsible, creative and socially engaged.

ACTING RESPONSIBLY

The protest movements in Algeria, Lebanon and Iraq have reacted responsibly to the health emergency. Some protesters initially took the COVID-19 crisis lightly and regarded the measures taken by state institutions as an attempt to put an end to their popular mobilisation, but the majority quickly realised that they needed to react responsibly and suspended all activities that involved taking to the streets in large numbers.

> 500

Victims since the beginning of Iraqi protests in October 2019



By accepting the new measures enforced by state institutions, protest movements have shown that they take people's health to heart. The decision to stop all forms of popular mobilisation has increased their popularity in the eyes of their respective societies. It has also refuted the regimes' propaganda, which often portrays these protest groups as "anarchists" who do not care about their societies and would like to drive their country into chaos. By taking this responsible stance, the protest movements have challenged this discourse and proven it wrong.

In Algeria, influential figures in the protest movement – including political prisoners – endorsed the decision, for example Karim Tabbou who sent a letter from prison calling on Algerians to suspend public protests until the end of the pandemic.¹ Other activists have also advised Algerians to fol-

ARAB YOUTH: FOR OR AGAINST?

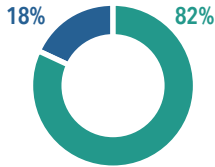
Youth support for the protests going on in their countries (Algeria, Iraq, Lebanon, Sudan)



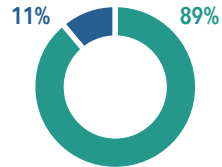
Do you support or oppose the anti-government protests?

● Support ● Oppose

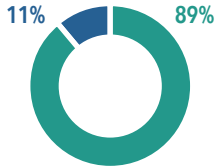
Protests in Lebanon



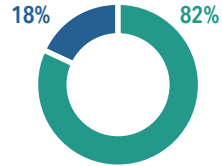
Protests in Algeria



Protests in Iraq



Protests in Sudan



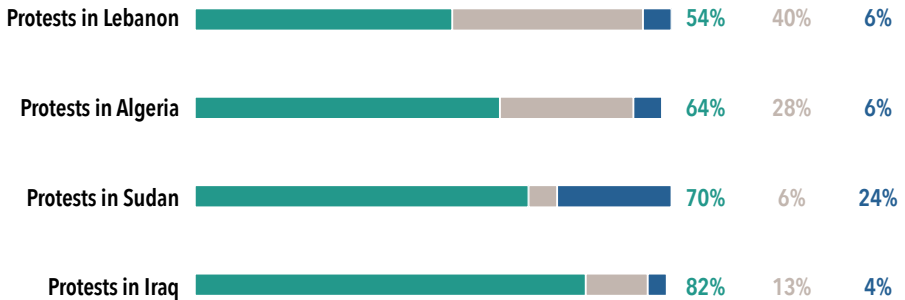
THE PROTESTS ACCORDING TO THE ARAB YOUTH

Youth opinion about the expected outcome of the protests going on in their countries (Algeria, Iraq, Lebanon, Sudan)



Do you think the anti-government protests will ultimately...?

● Lead to real positive change
● Have limited long-term impact
● Lead to real negative change



low all the measures adopted against COVID-19 so as to be able to continue their struggle for political change once the health crisis is over. In a video, a group of prominent Algerian activists showed signs that read “*Pour être libre, il faut vivre*” (To be free, you need to be alive) and “*Notre révolution sème la vie, jamais la mort*” (Our revolution sows life, never death). In Iraq too, protesters issued a statement announcing the halt of all demonstrations due to the severity of the pandemic, even if smaller sit-ins in Tahrir Square in Baghdad and other governorates continued. Moreover, Iraqi protesters have sanitised their squares to prevent the spread of the virus and distributed gloves, face masks, and hand sanitiser for free.

EXPLORING ALTERNATIVE FORMS OF PROTEST

As was the case in 2011 when protest movements relied on social media to mobilise support, this second wave of uprisings also relied on virtual platforms to disseminate their political message and to encourage popular support. With the restrictions that accompanied the COVID-19 pandemic, protesters transferred their activities online and joined existing virtual platforms. In Lebanon, Iraq and Algeria, Twitter hashtags have served as an alternative platform to bring attention to their demands both at home and with external actors.

In Algeria, activists have used social media to monitor the national health system’s performance in dealing with the pandemic and to criticise the regime’s policies, in particular its crackdown on Hirk activists. In Iraq, the protesters have launched online slogans since the beginning of their uprising to advance their demands and to draw attention to the atrocities committed by the security forces against non-violent activists. With a view to resuming their protests when the COVID-19 pandemic is over, online activities have provided important platforms to disseminate political messages. For example, in order to mobilise protesters against the appointment of Mohammed Allawi as prime minister in Iraq, activists launched the hashtag “March 1, Voice of the Martyrs” to call for a protest. In response to the COVID-19 health emergency they used the hashtag “No Shame in Masks,” calling on protesters to wear masks as a protection against both tear gas and the coronavirus.² In Lebanon, many political groups have also moved their political gatherings online in the form of webinars.³

Protesters have also invented new creative forms of protests. For example, in Algeria protesters went to their balconies banging pots and pans to express their anger against Kartim Tabbou’s extended imprisonment.⁴ In Lebanon, protesters organised a car protest where they waved Lebanese flags and chanted revolutionary slogans out of their car windows. Lebanese protesters have also continued to write revolutionary slogans on walls, in the belief that if they cannot be in the squares, at least their slogans are there.

63.3%

Share of informal workers
in Algeria



ENGAGING IN SOLIDARITY INITIATIVES

The measures implemented to fight COVID-19, including lockdowns and curfews, have economically harmed a large part of the labour force in the three countries, in particular those engaged in the informal economy with no access to health insurance or pensions. Informal employment is estimated to account for 65.5% of total employment in Lebanon, 64.4% in Iraq, and 63.3% in Algeria.

To help alleviate the socio-economic consequences of the COVID-19 crisis, protest movements have launched a number of solidarity initiatives. Algerian activists have participated in campaigns to clean and sanitise neighbourhoods, hospitals and public spaces and called for support to families that have lost their income because of the lockdown. In Iraq, protest groups have addressed the problem of food shortages and rising prices across the country by sharing essential food commodities: rice, vegetables, sugar and other necessities in working-class neighbourhoods.⁵ In Lebanon, activists have been engaged in providing food packages to those in need. One of these initiatives is led by the youth group Min Tishreen, which means “From October”, in reference to the October 2019 uprising, but could also be read as “Spread”. The group was born out of the 17th October revolution with the aim of “spreading” across Lebanon the political values that animated the uprising. However, after the start of the COVID-19 pandemic, the group has put its

political activities on hold and focused instead on social actions, mainly distributing food and medicines to those in need.⁶

These social initiatives have allowed the protest movements to reach out to sectors of their societies that have often been suspicious of the idea of revolutionary political change, fearing it might lead to political instability as was the case in Syria and Libya after the 2011 uprisings.

CONCLUSION

Although at first the COVID-19 pandemic seemed to offer a chance for the political regimes in Algeria, Iraq and Lebanon to end this second wave of uprisings, the protest movements have been able to adapt quickly to this new scenario and have turned this challenge into an opportunity. First, by acknowledging the gravity of the situation and putting all of their activities on hold they have consolidated their image as mature political actors that put the health of the population ahead of their political demands. Second, by exploring

alternative forms of activism, they have managed to maintain the revolutionary momentum even during the lockdown while keeping an eye on state policies intended to contain the pandemic. Third, by launching several social initiatives to help those who have been seriously hit by the lockdown in economic terms, they have increased their base of support to new sectors of society.

73%

Share of Lebanese youth thinking protests will be more likely due to the impact of COVID-19



To sum up, the protest groups' answer to the pandemic has increased their legitimacy. Their political discourse together with their social initiatives have allowed them to consolidate their presence on the political scene. As soon as the COVID-19 pandemic winds down, these movements will need to build on what they have achieved during the crisis to mark the beginning of a new phase of activity.

Balancing control and freedom of expression in the times of COVID-19

Viviana Mazza

Journalist, Corriere della Sera

In April 2020, at the height of the first wave of the COVID-19 pandemic in Europe, United Nations Secretary-General Antonio Guterres warned that the health crisis risked becoming a prolonged human rights crisis. The pandemic, he explained, had seen “disproportionate effects on certain communities, the rise of hate speech, the targeting of vulnerable groups, and the risks of heavy-handed security responses undermining the health response”.¹

On the sidelines of the annual gathering of world leaders, held online last September, UN Human Rights chief Michelle Bachelet² warned of a “crisis of governance” and a marginalisation of voices that she said will only deepen grievances and harm all society, as some authorities are accused of using COVID-19 restrictions as a cover to commit abuses and limit free speech. Bachelet called on countries to refrain from violating fundamental rights “under the guise of exceptional and emergency measure”: “Emergency should not be a weapon governments can wield to quash dissent, control the population, and even perpetuate their time in power,” she said. “They should be used to cope effectively with the pandemic – nothing more, nothing less.”

By no means was the UN referring only to the Middle East and North Africa (MENA). A top official from Bachelet’s office said about 80 countries had declared the state of emergency due to the coronavirus, including fifteen where the situations were deemed most troubling. Among those fifteen were three countries in the MENA region: Jordan, Morocco and Iran. A major concern about exceptional emergency measures is what has been described as “toxic lockdown culture”: “po-

lice and other security forces using excessive and sometimes deadly force to enforce lockdowns and curfews”.³

“Under international law, measures restricting basic rights during an emergency should be necessary, set out in law, limited in time and place to what is strictly necessary, proportionate, and provide for effective remedies for any violations of rights, such as an independent, transparent appeal mechanism”, says Human Rights Watch. The organisation adds that the International Covenant on Civil and Political Rights (ICCPR) allows countries to adopt exceptional and temporary restrictions on certain rights that would not otherwise be permitted “in times of public emergency which threatens the life of the nation.” But the measures must be only those “strictly required by the exigencies of the situation.”⁴

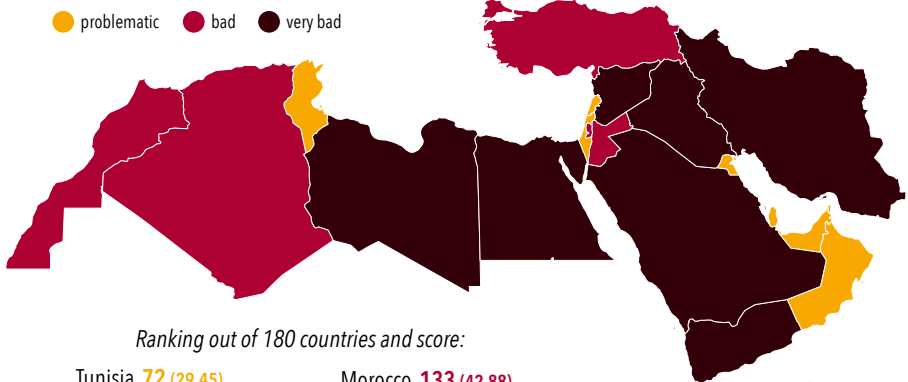
STATE OF EMERGENCY AND FREEDOM OF EXPRESSION

Jordan has been successful in controlling the spread of the disease but the concern is that it is restricting freedom of expression. In April 2020, Jordanian authorities issued a vaguely worded emergency decree which sought to punish dissemination of news that would “cause panic” with up to three years in prison. Since the declaration of an emergency in March, Jordanian authorities have detained two prominent media executives, a foreign journalist, and a former member of parliament, apparently for comments that were critical of the government, as well as three other people for allegedly spreading “fake news.”

Morocco declared a health emergency, setting penalties of a three-month prison sentence plus a fine for anyone breaching “orders and decisions

HOW FREE IS THE PRESS IN MENA COUNTRIES?

World Press Freedom Index 2020 (MENA region)



Ranking out of 180 countries and score:

Tunisia 72 (29.45)	Morocco 133 (42.88)	
Israel 88 (30.84)	Oman 135 (43.42)	Egypt 166 (56.82)
Lebanon 102 (33.19)	Palestine 137 (44.09)	Yemen 167 (58.25)
Kuwait 109 (34.30)	Algeria 146 (45.52)	Bahrain 169 (60.13)
Jordan 128 (42.08)	Turkey 154 (50.02)	Saudi Arabia 170 (62.14)
Qatar 129 (42.51)	Iraq 162 (55.37)	Iran 173 (64.81)
UAE 131 (42.69)	Libya 164 (55.77)	Syria 174 (72.57)

Source: Reporters without borders

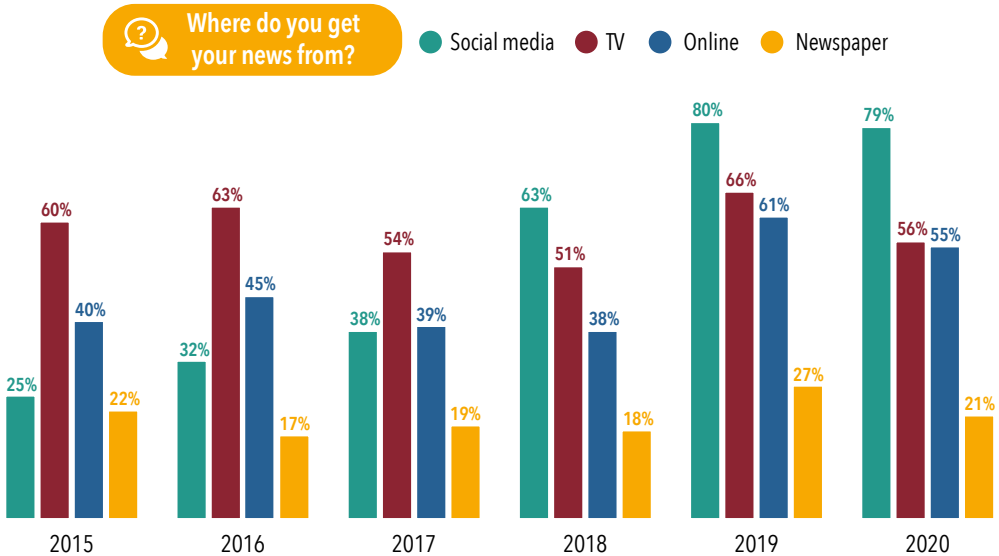
taken by public authorities” and for anyone “obstructing” through “writings, publications, and photos” those decisions. Draconian measures included nightly curfews enforced by police and armoured vehicles. The Health State of Emergency has been extended for the eighth time, until 10th December. Morocco has also been quick to crack down on dissent: according to Amnesty International,⁵ over 90,000 people were prosecuted in the first two months for breaking the lockdown and for other crimes, including five human rights activists and citizen journalists who were accused of “incitement to violate the authorities’ decisions during the health emergency”, “offending public institutions” and “spreading false information”. Prison sentences for those who break confinement or curfew – Amnesty argues – are a disproportionate measure, also considering the elevated risks of transmission of COVID-19 in prisons, and should not be used to silence the voices of those who dare to criticise the government.

When the COVID-19 crisis began, many countries in the region – among them Algeria, Lebanon, Iraq, and Sudan – were experiencing street protests, which the pandemic temporarily stalled. Algeria banned the Hirk, the movement that led to the ousting of president Bouteflika. According to an open letter signed last September by 31 human rights groups “in April 2020 the parliament hurriedly passed vaguely worded amendments to the Penal Code allowing for people exercising free speech to be charged with ‘spreading false news’, harming ‘national unity’ and ‘public order’, punishable by one to three years of prison”.⁶ Between March and June 2020, local rights groups estimate that at least 200 people were arrested for expressing their opinion or their support for the Hirk, while more than 1,400 have been prosecuted in relation to the protests since the start of the movement in February 2019.

In Libya, lacking a constitutional clause on emergency measures, the Government of Na-

SOCIAL MEDIA AS A NEWS SOURCE

Rate of access to different news sources among Arab youth



Source: Arab Youth Survey 2020

tional Accord (GNA) in western Libya, and the Interim Libyan Government (ILG) in eastern Libya, resorted “to ad-hoc measures based on often conflicting legislation”, according to a briefing by Democracy Reporting International.² These laws were used to impose curfews, limit movement between cities, close shops and places of assembly, and prohibit the gatherings of large groups. “Preferential treatment towards some individuals who were allowed to hold private and public events undermined the curfews and resulted in unequal limitations on freedoms.”

In Tunisia, the pandemic has underscored the country’s rocky road to democracy. Despite the health system’s weaknesses, the country seems to have been spared a major health crisis. The Tunisian government adopted drastic measures; for the first time since the adoption of the new Constitution, Tunisia’s fractious parliament also granted the prime minister temporary, exceptional powers to fight the pandemic. Of all the countries in North Africa, Tunisia best respects the right to freedom of expression. Yet, even here there have been several government attempts to silence

journalists and bloggers. For instance, in April 2020, two bloggers³ were detained for “insulting state officials”, “causing disturbances to the public” and defamation. This comes after their posts on social media alleged that the government has failed to provide financial aid and basic food supplies during the pandemic.

In early April 2020 in Iraq, Reuters’ license was suspended and the news agency was fined 25 million IQD (\$21,000) for an article alleging that the number of confirmed COVID-19 cases in the country was much higher than official statistics indicated. “Iraqi authorities, including in the Kurdistan Region, have routinely used vaguely worded laws to bring criminal charges against people who express opinions they dislike,” notes Human Rights Watch.²

Bachelet has also criticised Egypt for using COVID-19 as an excuse to crack down on journalists, and on freedom of speech and assembly. Human Rights Watch accused President al-Sisi’s government of “using the pandemic to expand Egypt’s abusive Emergency Law.”¹⁰ Egypt has lived under an almost constant state of emergen-

cy since 1981, with only a few months of interruption – mainly between 2012 and 2017 – giving the security forces power to indefinitely detain suspects with little or no judicial review. However, under international law, the right to a fair trial and judicial review of detention cannot be curtailed even in time of emergency. In April, the Egyptian parliament approved government-proposed amendments to the 1958 Emergency Law which gave additional powers to the President and security agencies. The government claimed the amendments concern public health emergencies such as the COVID-19 outbreak. However, only 5 of the 18 proposed amendments are clearly tied to public health developments. One of the amendments allows the restriction of public and private gatherings that do not fit the criteria of a specific health risk.

THE RISKS OF OVERCROWDED PRISONS

Several Egyptian prisons and police stations have had suspected COVID-19 outbreaks, putting scores of jailed human rights defenders at grave risk due to “lengthy and unnecessary pre-trial detention,” according to UN human rights experts.¹¹ The authorities have released about 13,000 prisoners since late February, but that number is insufficient to ease overcrowding in prisons. In Saudi Arabia, families of jailed government critics have been unable to contact them. The sister of Loujan Al-Hathloul, a prominent women’s rights activist, explained that after already spending two years in prison, her trial was also postponed because of COVID-19. Iran has been battling the region’s worst coronavirus outbreak. Some 85,000 inmates have been temporarily released. But inmates jailed for more than five years on national security charges – a category that includes many political prisoners who, according to human rights groups, have been arbitrarily detained and unfairly sentenced – have been excluded from these measures. Prominent activist Narges Mohammadi was released last October and Nasrin Sotoudeh in November, after concerns about their health. For months, protesters in Israel have gathered every Saturday night in front of Benjamin Netanyahu’s residence in Jerusalem, demanding that he leaves power and accusing him of mismanagement of

the health emergency. These protests – at times numbering as many as 20,000 people – have now been restricted by law. In fact, the Knesset has passed an amendment which forbids protesting more than a kilometre away from one’s home for the duration of the national lockdown. Protests are also limited to a maximum of 2,000 people divided in groups of 20.

CONCLUSION

In April 2020, an article published by the Carnegie Endowment for International Peace noticed that there were worrying signs for the future of places with a nascent democracy, such as Tunisia. “On social and traditional media, people call on the security forces to be more aggressive toward those who disobey the lockdown and curfew. An old adage, ‘Don’t mention human rights when it comes to fighting terrorism,’ is creeping into the public debate, with ‘coronavirus’ replacing ‘terrorism’.”¹² In the Middle East and North Africa, fighting terrorism used to be the umbrella under which states of emergency were justified. Today, COVID-19 is a new alibi for authoritarians who want to silence their streets and media.

13,000

Egyptian prisoners released from overcrowded prisons due to COVID-19 since February 2020



Some observers are afraid that this will carry serious ramifications for fledgling democratic movements and attitudes in the region. There is concern that the population might trade the development of a democracy for the relative security of a strongman figure in power. Others warn that a crisis like COVID-19 will have long-term economic consequences, and that it will erode what little public trust these governments enjoy.¹³ Ultimately, the health and economic consequences of the pandemic will serve to underscore many of the pre-existing problems in the region. In Egypt, the opposition movement Batel states that “the real pandemic that is more dangerous for the country is not corona, but the Sisi pandemic that has spread day after day.”¹⁴ Ultimately, if problems do not disappear, the dissent and protests will not either.

3

CIVIL SOCIETY,
CULTURE
AND MEDIA

The necessity for women's participation in the Syrian peace process

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Prior to the uprising of 2011, the political representation of women in Syria was rather limited and ineffective owing to authoritarianism, discriminatory and emergency laws as well as to the country's patriarchal system and values. While no legal restrictions prevented their participation in politics, at that point in time Syrian women only held 12.5% of parliamentary seats and 6% of ministerial positions. In 2011, Syria ranked 124th out of 135 countries in the Global Gender Gap Report, behind other neighbouring countries, 136th out of 190 countries in terms of women's representation in parliament and 156th out of 174 in terms of ministerial positions held by women.

The Syrian uprising was perceived as a milestone for the Syrian population, but particularly for women. The ten years of conflict have seen the birth and growth of a remarkable number of grassroots women's initiatives and groups. Syrian women have played key roles in nonviolent activism in the political, humanitarian, development, media, health and human rights spheres and in peacebuilding efforts. However, the protracted violent conflict, transforming structures, forced displacement, and ever-changing developments on the ground have undoubtedly impacted their role and limited the scope of their participation, especially at the political level.

BARRIERS VS PARTICIPATION

There are several barriers at both the local and the national level that inhibit women's participation and discourage them from entering the political sphere. Cultural, physical and structural constraints define the overarching framework of

broad challenges that women face in political circles. Several factors have directly impacted the security and jeopardised the protection of Syrian women and therefore their participation in the public sphere: these include the violent nature of the conflict, repeated displacement, changing governance structures, and a fragile scenario across the country, as well as the actions of the de facto authorities in charge. The repressive regime had prohibited political activism for several decades, while legal and educational barriers have been exacerbated by the conflict. Cultural and patriarchal norms in addition to economic disempowerment have pushed for the political marginalisation of Syrian women.

6%

Share of Syrian women holding ministerial positions before 2011



Even outside of the political sphere, women in Syria have had to cope with additional social burdens like stigma, intense criticism, comparisons to men, public disclosure of personal information, defamation and vilification. The lack of any serious commitment on the part of the warring parties and opposition bodies towards recognising the importance of women's role and inclusion has further hindered women's participation in the semi-stalled peace process. What is more, the general perception of the political field as corrupt, "dirty" and unsafe, has pushed many Syrian women to leave politics or refrain from entering it all together. All these factors have not contributed to creating a safe or sustainable environment for Syrian women to engage in political activity and peace efforts.

However, the fact that women are conspicuously denied any meaningful role in the peace process is not a Syrian prerogative: in fact, it remains a global challenge despite numerous UN resolutions stressing the significance of equal participation of women in all peacebuilding efforts and the need for their effective inclusion in decision-making. The structural design and current architecture of conflict resolution mechanisms continue to exclude women and be dominated by men. According to available data, only one woman has ever signed a final peace accord as chief negotiator. Statistics indicate that only 4% of signatories, 2.4% of chief mediators, 3.7% of witnesses and 9% of negotiators are women. Although several studies have proved the strong relationship between women's participation and peace durability and sustainability, UN Security Council Resolution 1325 (2000) has not led to a significant increase in women's meaningful participation in peace processes.

Despite all the existing challenges, Syrian women have succeeded in carving out new spaces and have relentlessly pursued a greater level of engagement in the semi-stalled political process and peacebuilding efforts. Daily struggles and survival mechanisms have helped to change norms and perceptions and to give women new leading roles in everyday life. Their driving force and the human capital they represent deserve international support, particularly in transitional and post-conflict times.

SYRIAN WOMEN IN NEGOTIATIONS AND THE PEACE PROCESSES

Internationally, several initiatives have been deployed to enhance Syrian women's participation in the peace process. The establishment of advisory groups at the margins of the peace negotiations is a case in point, which has gained momentum and attracted widespread attention. Examples include the Women's Advisory Board (WAB) to the UN Special Envoy and the Women's Advisory Committee (WAC) of the High Negotiations Committee (HNC) (see the box). Another initiative consists in convening conferences and gatherings for Syrian women from different political and civic backgrounds and orientation to build consensus and, sometimes, to forge unity. Several meetings, workshops, and national con-

SYRIAN WOMEN: THE ROAD TO PEACE?

Syrian women's initiatives of participation to the Syrian peace process*

Women Now for Development

Paris, June 2012

Syrian NGO whose mission is the protection of Syrian women and children and the political empowerment of women.

Syrian Women's Forum for Peace (SWFP)

Paris, June 2012

Launched by more than 40 Syrian women from all walks of social and political life, it aims at forging a united vision and strengthening the role of Syrian women.

Syrian Women Network (SWN)

Cairo, February 2013

It includes democratic, nongovernmental and independent individuals and organisations working on gender equality, democracy, human rights, peace, and transitional justice.

Syrian Female Journalists Network (SFJN)

2013

The SFJN seeks to empower female journalists and to promote the role of the media in raising social awareness concerning gender equality and women's issues.

Syrian Women's Initiative for Peace and Democracy (SWIPD)

Geneva, January 2014

Founded in Geneva by UN Women and the Government of the Netherlands, it supports women's participation and voice in the Syrian peace process.

Syrian Feminist Lobby (SFL)

Istanbul, July 2014

An independent lobby group launched by Syrian women's rights and political activists from different political backgrounds with the aim of strengthening the participation of Syrian women in the political decision-making process.

Women's Advisory Board (WAB)

February 2016

Composed of 12 women, it aims at consulting and meeting with the UN Special Envoy to Syria without participating in the peace talks.

Women's Advisory Committee (WAC)

February 2016

Composed of 12-14 women and supported by the governments of Sweden and Canada, it worked on formulating a gender perspective for the High Negotiations Committee. It was dissolved in November 2017.

Syrian Women Peacemakers

Beirut, May 2016

This conference was organized by UN Women for 130 Syrian political and civil society activists, who met to build consensus, forge a statement of unity and overcome significant political divides.

Syrian Feminist Alliance

January 2017

It includes Syrian individuals and organisations and works on peace, women's security, and the activation of UN Resolution 1325, while urging all actors to increase women's participation and include a gender perspective in all peacebuilding endeavours.

Syrian Women's Political Movement (SWPM)

Paris, October 2017

Founded by 28 women, it was created out of a collective need to support Syrian women's demand for meaningful representation in the political process by at least 30%.

Toward a Framework for the Syrian Women Movement

Beirut, June 2018

This conference was organized by UN Women for 200 Syrian women in Beirut in June 2018 and aimed at creating a common framework despite significant differences among the participants.

Syrian Feminist Society (SFS)











Western Aleppo, November 2018

A civil society organisation based in the Western Aleppo suburbs, it aims at supporting and empowering women and enhancing their role at local and national level.

*The list was compiled by the author and it is not intended to be exhaustive.

INTERNATIONAL NEGOTIATIONS: WHERE ARE WOMEN?

Percentage of Syrian women participating in international negotiations (2014-2019)

Event	Year	Syrian Government	Opposition	Civil Society
Geneva* II	2014	-	-	-
Geneva III-VII	2016/17	-	 8%	-
Geneva VIII	2017	-	 13%	-
Riyadh** I	2015	-	 7%	-
Riyadh II	2017	-	 15%	-
Constitutional Committee (CC)	2019	 26%	 14%	 26%
Small Group of the CC	2019	 20%	 13%	 20%

*: UN-backed international peace conference on the future of Syria

** : Syrian political and armed opposition forces meeting in Riyadh at the invitation of Saudi Arabia

Numbers and percentages of women's representation were collected by the author; some were not publicly available.

sultations with Syrian women have been conducted to build on their expertise and knowledge in different areas, to enhance their political participation, to share and connect their experiences and to inform national action plans on women, peace and security.

and consistency and the absence of clear selection criteria for their members. These endeavours were perceived as disconnected from the real needs and grassroots women organisations on the ground and probably contributed to the exclusion of Syrian women from the negotiating table in the peace process.

Some criticism concerned the fact that, as is the case with aid agencies, international organisations and stakeholders usually engage the same women (and/or their organisations) again and again, fuelling a practice that tends to favour what are known as "donor-darlings". This results in deeper imbalances between grassroots women organisations and those that already have access to international aid, support and attention, possibly leading to a fragmentation of women's efforts as a whole and impacting the effectiveness and coherence of their work.

Additionally, international pressure should be channelled in a more coherent and strategic way to ensure at least 30% women representation in Syria in all phases of the political process and transitional period. In the establishment of the



UN standard of women's representation in international peace processes

30%

Despite the international community's genuine commitment and serious efforts, the effectiveness of initiatives to support Syrian women has been repeatedly questioned. In the first round of peace talks in January 2014, no women were present at the negotiating table. The situation did not improve in subsequent negotiation rounds and international pressure failed to compel the negotiating parties to engage women by at least 30%. The two women advisory group experiences – that differed in terms of strategic relevance as well as financial endowment and logistics – attracted criticism for their lack of transparency

three groups¹ that made up the Constitutional Committee in late October 2019, the UN was careful to ensure equal representation of women in the civil society group, to offset their weak presence in the opposition group.

THE WAY FORWARD

Despite the protracted conflict and frustrating peace process, there is genuine commitment towards supporting Syrian women and ensuring their inclusion at decision-making level. However, international stakeholders – including donor governments, UN agencies and international organisations – should rethink their approach and find, together with Syrian women, alternative strategies to enhance their presence and meaningful and equal participation in the political process and in post-conflict and reconstruction efforts. International support to Syrian women must be coordinated and consistent to avoid fragmentation, duplication and a waste of resources. Support to women should be based on a strategic vision focused on how and why to increase their presence and effectiveness in different capacities, coupled with alternative strategies that ensure continuity regardless of political and military developments on the ground.

The work of international stakeholders to support Syrian women should be mapped to include the number of events, topics, attendees, resources and most importantly the impact of the initiatives undertaken. Periodical impact evaluations should be conducted to assess the actual use of funding allocated to different actions, programmes and initiatives aimed to support Syrian women and women organisations, and to examine the effectiveness and sustainability of such support. The evaluation should be analytical, transparent, critical, open to the public, and the results should be communicated to and discussed with Syrian women.

In the quest to support Syrian women, any form of support should not, under any conditions, depoliticise them or demand them to take bland stances in a highly politicised and polarised environment. There is a tendency to push for unity and to treat Syrian women as apolitical, which deprives them of their political

agency, or any other agency, an attitude that ultimately flies in the face of international calls for women's political participation and their inclusion in the peace process. The deployment of a political economy framework is key to analyse and understand the meaningful participation of Syrian women with a view to unpacking and overcoming the normative barriers that obstruct their participation. Efforts should be put towards strengthening non-traditional approaches and mechanisms so as to invest in grassroots women's groups and enhance their political relevance through different mediums. This would serve to create a nexus between formal and informal processes, between Syrian women engaged in the international peace mechanisms and grassroots women's organizations, and between Syrian women and other global women mediators' networks.

9%

Share of women negotiators in peace processes at a global level



It is essential to proceed to a comprehensive mapping of women's initiatives and organisations that have emerged since 2011, their structures, mechanisms and processes. The mapping should aim to identify the dynamics of interaction between these groups and organisations and to analyse their development or disappearance, perhaps in connection with safety considerations or lack of resources. The outcome of this mapping exercise should be made publicly available without jeopardising the safety of Syrian women or exposing them to further risk or intimidation. Syrian women should play a relevant role not only in consultation or advisory groups, but in all political and social processes, particularly at decision-making levels within the international community – donor governments, UN agencies, international organisations and other stakeholders. To do so, Syrian women must be involved in leading or sharing the lead in the design, implementation, coordination, facilitation, decision-making and management evaluation of international programmes and projects that support Syrian women.

Does a North African internet governance model exist?

Evidence from Egypt and Morocco

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Amidst the growing relevance of the internet worldwide,¹ concerns have been raised both in academic and policy circles about the fragmentation of internet governance in the world. More specifically, some scholars have warned about a sort of regionalisation of internet governance models.² In this chapter, we will examine in detail the internet governance approach of Morocco and Egypt based on two aspects: on the one hand, their domestic policies on the matter and, on the other, their positions on cyber policy expressed at the United Nation General Assembly. Morocco and Egypt are the only two North African countries that participated in the United Nation Group of Governmental Experts on Advancing responsible State behaviour in cyberspace in the context of international security. This is a key forum that has been working on cyberspace norms and principles since 2004, achieving some important results.³ What policies have the two countries pursued? Are there commonalities to be found? Is there a sort of North African internet governance model?

COMPETING GOVERNANCE MODELS

The decline of the utopian project of a free and uncontrolled cyberspace has been accompanied by a parallel rise in the interest and involvement of governments in ruling this domain. One of the first countries to take action was Russia. In 1998 Russia submitted to the General Assembly of the United Nations a resolution to identify illegitimate conducts in cyberspace. This resolution paved the way for the creation of the first United Nations Group of Governmental Experts (UNGGE). At the first UNGGE meeting in 2004, the participating

states failed to reach an agreement and no final report was adopted. Over the years, subsequent UNGGE sessions produced several important documents, which some countries refer to as “the ‘acquis’ of the process.”⁴ More recently, in 2018, Russia initiated another resolution for the establishment of a parallel working group on cyber-related issues (whose mandate is very similar to that of the UNGGE), claiming that these fora should be open to all relevant stakeholders, including private companies and civil society organisations. According to Moscow, the UNGGE has become an elite group which does not represent all the different actors involved in cyberspace.

74.37%

Share of Moroccan population having access to the internet



The work of the UNGGE addresses the issue of global internet governance by providing clear rules for states concerning responsible behaviour and identifying potential threats and measures that are suitable to counter them. However, while some countries – like Russia and China – focus mainly on information security and regime continuity, others like the United States seem mostly concerned with the technical aspects of cybersecurity. According to experts, these two competing cybersecurity paradigms – reflecting approaches that can be classified as globalised (free information) vs aligned (control of information)⁵ – are now “firmly connected to the principle of ‘digital sovereignty’ that appeals to many countries and feeds further polarisation.”⁶ While the dichotomy does not necessarily apply clearly to all countries⁷, it can

HOW TO BEHAVE RESPONSIBLY IN CYBERSPACE?

Two UN processes compared

UN GAA/RES/73/266

**UN Group of Governmental Experts
(2019-2021)**

25 selected members

Chair:  Brazil

6 consultations with regional organisations (AU, EU, OAS, OSCE, ARF, ASEAN Regional Forum), 2 with all member states

- Definition of norms, rules and principles
- Confidence building measures (CBMs) and capacity building
- Application of international law to cyberspace

UN GAA/RES/73/27

**UN Open-Ended Working Group
(2019-2020)**

All interested UN member states

Chair:  Switzerland

6 consultations with regional organisations (AU, EU, OAS, OSCE, ARF, ASEAN Regional Forum), 2 with all member states

- Development or change of norms, rules and principles listed in A/RES/73/27 (par. 1)
- CBMs and capacity building
- Application of international law to cyberspace
- Management of existing and potential threats
- Establishment of a dialogue within UN institutions
- Development of relevant international concepts for securing global IT systems

How they work?

What they do?

Source: UN

be argued that the international debate revolves around these two competing models.⁸

NATIONAL INTERNET GOVERNANCE POLICIES

In the last decade, both Morocco and Egypt have adopted important laws that have shaped their respective current approaches to internet governance⁹.

In Morocco, the Information and Communications (ICT) infrastructure is owned by the state. And yet, over the years, the government in Rabat has launched the liberalisation of the telecommunication sector. This process began in the late Nineties and was managed by the National Telecommunications Regulatory Agency (ANRT). Nowadays there are three leading Internet Service Providers (ISP) in Morocco: Maroc Telecom, Orange Morocco, and INWI. Throughout this process, no connectivity restrictions have been imposed by the government, which does not exercise technical or legal control over the internet

93%

Moroccan youth (aged 18-29) using the internet regardless of frequency



infrastructure for this purpose.¹⁰ Internet access in Morocco is, for the most part, open and unrestricted. ANRT also manages the top-level country domain (.ma) in a most indiscriminate manner. Nevertheless, the odds for potential systemic control over content are high as the internet backbone is very centralised.¹¹ In this regard, Morocco's censorship and filtering policies are quite targeted and sectorial. These policies are enforced by limiting access to specific websites, social media monitoring, and limiting the use of torrents.¹² In terms of content, authorities have the right to shut down any online content that is deemed "prejudicial to Islam, the monarchy, territorial integrity, or public order."¹³ The law specifically addresses investigative journalism, but the effects spread out

CHOOSING A PARADIGM TO GOVERN THE CYBERSPACE

Voting preferences at UNGA regarding UNGGE and UNOEWG resolutions

Year	Resolution N°	USA	Russia	Morocco	Egypt	Total Yes	Total No	Absentee/ non-voting
2003	A/RES/58/32*	* adopted without vote						
2005	A/RES/60/45	No	Yes	Yes	Yes	177	1	13
2006	A/RES/61/54	No	Yes	Yes	Yes	176	1	15
2007	A/RES/62/17	No	Yes	Yes	Yes	179	1	12
2008	A/RES/63/37	No	Yes	Yes	Yes	178	1	13
2016	A/RES/71/28	Yes	Yes	Yes	Yes	181	-	11
2018	A/RES/73/266 (U.S. backed)	Yes	No	Yes	No	138	12	43
2018	A/RES/73/27 (Russia backed)	No	Yes	Yes	Yes	119	46	28
2019	A/RES/74/28 (U.S. backed)	Yes	No	Yes	No	163	10	20
2019	A/RES/74/29 (Russia backed)	No	Yes	Yes	Yes	129	6	58

UNGGE
 UNOEWG

Data: UN Digital Library

to the internet community as a whole. However, Freedom House has not reported any internet blocking by the government since 2013.¹⁴ This could reflect a spillover effect on users in terms of self-censorship. For what concerns digital sovereignty, Morocco does not require websites to host their data on national servers and has not enforced any internet shutdowns so far.

Share of Egyptian women using
the internet
regardless of frequency

47%

In Egypt, the internet infrastructure is mostly owned by the state, which is also in charge of the largest ISP. The National Telecommunication Regulatory Authority (NTRA) regulates all ICT and ISP activities, but it has no formal independence from the government.¹⁵ Due to the lack of ADSL capacity, connections are weak or absent in many parts of the country, but connectivity has

increased thanks to the rise of mobile users. Nevertheless, the government maintains “considerable control over internet infrastructure and has restricted connectivity.”¹⁶ Indeed, Telecom Egypt – a state-owned company – enjoys a dominant position over the country’s ICT infrastructure, and this allows the government to carry out interventions on the net. For example, Egyptian authorities reacted swiftly to shut down internet connectivity during the 2011 revolution.¹⁷ Moreover, according to Accessnow, authorities “are still blocking at least 572 websites [...] since May 2017, including digital media platforms, human rights initiatives, and civil society organizations.”¹⁸ In terms of content censorship, law no. 175/2018 permits authorities to block websites without a judicial order for “publishing any content that constitutes a crime under the law, provided it poses a threat to national security or endangers the security of the country or its national economy.”¹⁹ According to human rights organisations

and freedom of speech associations, the applicability of this law could be totally arbitrary. Finally, as regards digital sovereignty and data protection, the government recently passed the Personal Data Protection Law (Law No. 151 of 2020), which exempts some Egyptian authorities²⁰ from the obligation to protect users' personal data.²¹ This law follows the above-mentioned 175/2018 law, which requires ICT companies to store data on users' online activity for 180 days, and grants authorities access to these data.

VOTING BEHAVIOUR AT THE UNGA

Morocco and Egypt both participated in the UN General Assembly voting procedures for the establishment of all UNGGE's and, most recently, the Open Ended Working Group (UNOEWG) parallel experts' group backed by Russia. Moreover, the two North African countries participated in the UNGGE and are free to take part in the UNOEWG. The table on page 104 is an analysis of Morocco's and Egypt's voting behaviour in polls aimed at the establishment of these groups of experts based on the assumption that there are two competing visions of cyberspace governance, one championed by the United States and the other by Russia.

NO ONE MODEL FITS ALL

This concise comparative analysis between the two North African countries, which are playing a crucial role in the international debate regarding internet and cyberspace norm-building, indicates that there might not be a unique or shared model for the entire region. Differences are evi-

dent in particular in the way national authorities are building their own internet governance at domestic level. Morocco has adopted a more globalised approach, which guarantees freedom of information on the net, while in Egypt, authorities are pursuing a more centralised and stricter control over users' data and content censorship. The same differences in approaches can be found at the international level.

45.2% Egyptian population using Facebook



The comparative analysis of Morocco's and Egypt's voting behaviours at the United Nations General Assembly seems to lead to the following conclusions. First of all, polarisation at international level has intensified over the years (only the United States voted against the first resolution establishing the UNGGE sessions). Second, Egypt has appeared to be more in line with Russia both in terms of approving new resolutions and rejecting US-sponsored ones. Morocco has adopted a different approach and appears keener to accept or reject proposals regardless of their initiator. To conclude, it would appear that in North Africa no stark regionalisation of internet governance models can be observed. Instead, the two countries, which are playing a leading role at the international level, are pursuing different models domestically. There seems to be a strict correlation between the national approach adopted by the countries analysed and their contribution to norm building at international level.

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ISBN 9788894469417