Underpinning the MENA Democratic Transition:

Delivering Climate, Energy and Resource Security

Summary Presentation
April 2013
Contents

• Project Objectives and Methodology

• Analysing Instability Dynamics

• 2025 Scenarios for Egypt and Tunisia

• Strategic Recommendations
Strategic context

• There is a surge of public investment from the EU and US into the MENA region to support emerging democracies, especially in Egypt and Tunisia.

• Initial funds have been allocated by the G8 but are yet to be fully programmed, additional trade, investment and economic relations programmes will follow.

• The recurrence of political instability in Egypt and Syria delayed investment in 2011/12 but it expected that significant programming will occur in 2013.
• Economic stability is a critical requirement for the development of nascent democracies in the MENA region.

• These economies face significant constraints on growth due to shortages of energy and water exacerbated by climate change.

• Experience from previous politically driven post-conflict economic support packages (e.g. in the Western Balkans) suggests that they often ignore medium term structural issues in a rush to maximise short run growth.

• Given the high levels of climate and resource vulnerability in the MENA region it is critical that increased public investment and economic support is directed to low carbon, resource efficient and climate resilient investment which has a strong impact on economic and political stability.
Project Objectives

Objectives

1. Create a compelling case with leading EU, US and MENA decision makers that external public funding to MENA must address medium term climate, energy and resources drivers of instability.

2. Integrate energy, climate and resource issues into the programming of new investment in Egypt and Tunisia.

3. Use the MENA case to accelerate the mainstreaming of climate, energy and resource issues into security policy.

Project aims to develop methodological innovation as well as practical strategic recommendations for MENA region.
What This Project Did Not Do

- Carry out detailed engagement with policy makers in MENA region – but will consult regional experts
- Develop new medium-term climate, resource and energy scenarios for the region
- Develop detailed investment and policy reform plans for Egypt and Tunisia

Output is a set of robust strategic recommendations; phase 2 would be to develop and deliver detailed policy proposals
Key Project Take Aways

• Democratic transition in MENA remains vulnerable to economic shocks, including food and oil prices

• Even under best-case political and economic scenarios instability risks remain high in Egypt and Tunisia to 2025.

• Development strategies in the region need to focus more strongly on building economic and social resilience alongside economic growth.

• Resource efficient and low carbon investment opportunities offer potentially high-value stability interventions but require shifts in country and int'l partner priorities and practices
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The Instability Framework

**Stability** is the peaceful management of change and shocks.

**Instability** arises from the *relative* imbalance between country capacity, internal and external risk factors and external stabilisers.
The Instability Framework

**Risk factors for instability**

- Violent Conflict
- Political instability
- Loss of Territorial Control
- Economic Crisis

**Country capacity and resilience**

- How well can a country resolve disputes?
- How resilient are structures to shocks?

**External stabilising factors**

- Do regional and global actors support country stability?
- Do international institutions support country stability?

**Shocks**

Is the country vulnerable to political, economic and environmental shocks?

**Emerge when country capacity is weak, risk factors for instability are high, and external stabilising factors are limited**

Instability feeds back and strengthens risk factors of instability, creating a vicious circle

Source: UK Prime Ministers Strategy Unit 2005
Relative balance of factors changes over time as country risks change, crises emerge and are resolved.

1. Pre-Crisis, instability increasing
2. Crisis Emerges
3. Crisis with International Stabilisation
4. Post-Crisis with International Stabilisation

- Violent Conflict
- Political instability
- Loss of Territorial Control
- Economic Crisis

Risk factors for instability

Country capacity and resilience

External stabilising factors

External Intervention to Halt Crisis

Shocks
Relative balance of factors changes over time as country risks change, crises emerge and are resolved.

1. Stable Country
   - Risk factors for instability
   - Country capacity and resilience
   - External stabilising factors

2. Pre-Crisis, instability increasing
   - Risk factors for instability
   - Country capacity and resilience
   - External stabilising factors
   - Violent Conflict, Political instability, Loss of Territorial Control, Economic Crisis

3. Crisis Emerges
   - Risk factors for instability
   - Country capacity and resilience
   - External stabilising factors
   - External Intervention to Halt Crisis

4. Post-Crisis with International Stabilisation
   - Risk factors for instability
   - Country capacity and resilience
   - External stabilising factors

E3G - EWI
Instability Framework: generic factors to consider in analysis from conflict literature

**Risk factors for instability**

**External**
- **Generic**
  - Bad regional neighbourhood
  - International terrorism
  - Geopolitical competition
  - Conflict financing
  - Off-shore financial havens
  - Low quality MNCs
- **Future factors**
  - HIV/AIDS
  - Resource scarcity
  - Climate change
  - Demographics

**Internal**
- **Generic factors**
  - Low GDP/Economic decline
  - Previous conflict
  - Natural resource dependence
  - Horizontal inequality
  - Organised Crime

**External stabilising factors**
- **Political/Institutional**
  - Bilateral relationships
  - Regional groupings
  - Standards in regional/global institutions
- **Economic**
  - Open external markets
  - Good quality FDI
- **Security**
  - Security guarantees

**Country capacity and resilience**

- **State Capacity**
  - Security
  - Macroeconomic fundamentals
  - Public good provision
- **Civil Society**
  - Civil society orgs
  - Traditional systems

- **Rules of the Game**
  - Political Institutions
  - Legal/economic institutions
  - Executive checks & balances

**Social Contract**
- Leadership
- Legitimacy
- Expectations vs delivery

**Violent Conflict, Political instability, Loss of Territorial Control, Economic Crisis**

Emerge when country capacity is weak, large risk factors of instability exist, and external stabilising factors are limited.
Critical Stability Dynamics

- Transitional democracies are more vulnerable to internal instability than either autocracies or mature democracies.
- Instability in an autocracy can give space for democracy; instability in transitional democracies can lead to autocracy.
- Strong correlation between sudden declines in per capita income and increased risks of instability.
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Weak MENA Manufacturing Exports
Exports are shrinking in labor-intensive manufacturing

**Figure 16: Structure of commodity exports for oil-poor countries, 1995-2009**

- Agricultural raw materials
- Fuel
- Food
- Ores and metals
- Chemicals and related products
- Textiles and clothing
- Manufactured goods
- Machinery and transport equipment

Source: Authors' estimates based on data from UN Comtrade dataset.
Note: Oil-poor countries included are Jordan, Egypt, Morocco and Tunisia

Source: UNDP Arab Development Report 2012
FDI largely directed towards oil exporters

Source: OECD, FDI Trends

Reflecting the MENA FDI inflow, the region's investment landscape shows a significant concentration towards oil exporters. According to the data from UNCTAD 2010, the top recipient countries are:

- Saudi Arabia: 47%
- UAE: 5%
- Qatar: 11%
- Lebanon: 6%
- Egypt: 9%
- Jordan: 3%
- Tunisia: 3%
- Morocco: 2%
- Syrian: 2%
- Oman: 3%
- Libya: 4%
- Algeria: 4%
- Others: 15%

The chart highlights that 2009 MENA FDI Share is dominated by oil exporters, accounting for 76% of the total investment. Non-oil exporters contribute to 24%.
Egypt 2012: unstable but more capacity and external support?

Risk Factors

External
- Instability in neighbouring countries
- Nile water tensions
- Israel-Palestine
- High regional competition
- Decreased tourism
- Crisis in EU decreasing demand for exports

Internal
- Resurgence of Islamist parties
- High youth unemployment
- Lack of business class
- High social disparities and rural exclusion
- Lack of adequate housing
- High levels of corruption
- Poor water management, resource base

Shocks
- high vulnerability to global food price and oil price shocks
- high vulnerability to Euro collapse

Country capacity and resilience
- State Capacity
  - Strong security system
  - Macroeconomic imbalances - energy and food subsidies
  - Weak service delivery
- Rules of the Game
  - Weak but strengthening political institutions
  - High corruption
- Social Contract
  - Split polity
  - Weak political parties
- Civil Society
  - Weak but growing civil society

Civil and political unrest and growing economic crisis

External stabilising factors
- Political/Institutional
  - EU and regional relationships weak
- Economic
  - FDI falling
- Security
  - US security assistance

Risk Factors

External
- High vulnerability to global food price and oil price shocks
- High vulnerability to Euro collapse

Civil Society
- High youth unemployment
- High social disparities and rural exclusion
- Lack of adequate housing
- High levels of corruption
- Poor water management, resource base

State Capacity
- Strong security system
- Macroeconomic imbalances - energy and food subsidies
- Weak service delivery

Civil and political unrest and growing economic crisis

E3G - EWI
Tunisia 2012: fragile and getting worse? Or better?

**Risk Factors**

**External**
- Instability in neighbouring countries
- Regional water stress
- Migration from Sub-Saharan Africa
- High regional competition
- Decreased tourism
- Crisis in EU: lower remittances and decreasing demand for Tunisian exports

**Internal**
- Resurgence of Islamist parties
- High youth unemployment
- High social disparities
- Lack of adequate Housing
- High levels of corruption
- Poor water management, resource base

**Shocks**
- High vulnerability to global food price and oil price shocks
- High vulnerability to Euro collapse

**Country capacity and resilience**

**State Capacity**
- Macroeconomic imbalances
- Above average service delivery in urban areas

**Rules of the Game**
- Weak but strengthening political institutions
- High corruption

**Social Contract**
- Unified polity
- Weak political parties

**Civil Society**
- Relatively strong and active

**Political unrest and growing economic crisis**

**Risk Factors**

**External stabilising factors**

**Political/Institutional**
- EU and regional relationships weak

**Economic**
- FDI falling
- Trade openness stalled

**Security**
- Implicit NATO security guarantee?
The Climate-Energy-Resource Nexus

Source: E3G 2006
Climate related hazard exposure in North Africa

Source: Busby et al 2010
Large differences exist between current methodologies; not a sound basis for security analysis.

- Sea level rise and changes in water supply dominate results
- Capacity to adapt usual assessed in terms of GDP not social systems
- Large differences in rankings of even G20 countries
- Don’t address dynamic vulnerabilities like food or energy price shocks

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<th>GAIN Order</th>
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<td>Turkey</td>
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</tbody>
</table>

HSBC Rank 1 is most vulnerable for 19 of the G20 countries
Gain Rank 1 is least vulnerable out of 182 countries
Gain Order is most to least for G20 on the GAIN Rank
Critical pathways linking climate and resource issues to instability

- Communal tensions over resource scarcity/volatility: e.g. pastoralist/farmer conflicts in SSA

- Economic recession: e.g. drought limiting hydro electric output; climate driven drop in tourism revenue; drop in demand for carbon-intensive goods.

- Sudden drop in living standards: e.g. food and fuel price shocks in 2008 and 2010;

- Inter and Intra state governmental tension over resource management: e.g. shared watercourse management; fisheries management

- Extreme events: floods/droughts driving mass displacement
Food Price Volatility 2030

![Graph showing food price volatility for 2030 with details on percentages of increase on 2010 baseline and additional increase due to weather shocks in North America.]

- **Wheat**
  - 120% increase on 2010 baseline by 2030
  - 177% increase on 2010 baseline by 2030
  - North America Shock: 33% additional price increase on 2030 baseline
  - North America Shock: 140% additional price increase on 2030 baseline

- **Maize**
  - Additional % increase in world market export price in 2030 due to weather related shock

Source: Oxfam 2012
Uncertainty over Nile flows could drive tensions?
Increased Failure of the Cereal Growing Season

2000

2050
Analytical Challenges

- Reasonably good data on national water and food scarcity as driven mainly by demographics and industrial structures
- Much larger uncertainties when assessing future state of global markets for energy and food
- Broad climate trends are clear but near term 2020/2030 climate assessment much harder
- Current vulnerability assessments do not capture the type of dynamics needed to inform security analysis

Data quality and gaps means that conclusions need to be framed by likely bias to underestimate short term impacts
Egypt 2025: Best Case – instability risks falling but vulnerable to shocks?

Risk Factors

External
- Stability in neighbouring countries
- Low Nile water tensions
- Israel-Palestine low tension
- High regional competition
- Decreased tourism
- Decreasing EU demand for high carbon exports

Internal
- Gas production decline
- High youth unemployment
- High social disparities and rural exclusion
- Rural exclusion
- Poor water management, resource base

Shocks
- Vulnerability to global food price and oil price shocks
- High vulnerability to extreme climate conditions

Country capacity and resilience

State Capacity
- Strong security system
- Macroeconomic imbalances lower
- Average service delivery

Rules of the Game
- Strong political institutions
- Low corruption

Social Contract
- Split polity
- Strong political parties

Civil Society
- Strong civil society

External stabilising factors

Political/Institutional
- EU and regional relationships strengthening
- Positive relationships with Turkey and Gulf
- Regional stability growing

Economic
- FDI increased in medium tech sectors
- BRIC and Gulf FDI in infrastructure

Security
- Nile Basin mgt system holding

Some economic instability

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Egypt 2025: Worst Case – instability risks high and vulnerability increasing?

Risk Factors

External
• Stability in neighbouring countries
• High Nile water tensions
• Israel-Palestine tensions
• High regional competition
• Decreased tourism
• EU decreasing demand for high carbon exports

Internal
• High youth and professional unemployment
• Weak business class
• High social disparities and rural exclusion
• Rural exclusion and maladaptation
• Poor water management, resource base

Shocks
• vulnerability to global food price and oil price shocks
• high vulnerability to extreme climate conditions

Country capacity and resilience

State Capacity
• Strong security system
• Macroeconomic imbalances
• Low growth
• Low service delivery

Rules of the Game
• Weak political institutions
• High corruption

Social Contract
• Splits in polity widening
• Weak political parties

Civil Society
• Strong civil society

Some civil unrest – rural and urban - and economic instability

External stabilising factors

Political/Institutional
• EU relationships weak
• Positive relationships with Turkey and Gulf
• Regional stability low

Economic
• FDI weak outside oil and gas
• BRIC and Gulf FDI
• Migration to Gulf

Security
• Nile Basin mgt system weak
Tunisia 2025: Best Case - fragile but integrated?

**Risk Factors**

**External**
- Regional water stress
- Increased migration pressures from Sub-Saharan Africa
- High regional competition
- Decreased tourism
- Lack of export markets/decreased European demand

**Internal**
- High youth unemployment
- High social disparities
- Energy and water scarcity undermines key sectors
- Agricultural output depressed by climate shocks
- Poor water management, resource base

**Shocks**
- Increasing vulnerability to global food price and oil price shocks
- High vulnerability to direct climate shocks

**Country capacity and resilience**

**State Capacity**
- Macroeconomic imbalances
- Above average service delivery in urban areas
- Energy and water scarcity undermines key sectors

**Rules of the Game**
- Consolidating political institutions
- Low corruption

**Social Contract**
- Unified polity
- Strong political parties

**Civil Society**
- Relatively strong and active

**Economic**
- FDI increased in medium-tech sectors

**Security**
- Implicit NATO security guarantee?

**External stabilising factors**

**Political/Institutional**
- EU and regional relationships strengthening (emphasis on migration in case of the EU)
- Regional stability growing

**Social unrests and economic instability**

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Tunisia 2025: Worst Case - unstable and isolated?

Risk Factors

External
- Instability in neighbouring countries
- Regional water stress undermines cooperation
- Increased migration pressures from Sub-Saharan Africa
- High regional competition
- Decreased tourism
- Lack of export markets/decrease in European demand

Internal
- High youth and professional unemployment
- High social disparities
- Lack of adequate housing
- Agricultural output depressed by climate shocks
- Energy and water scarcity undermines key economic sectors
- Poor water management, resource base

Shocks
- Increased vulnerability to global food price and oil price shocks
- High vulnerability to direct climate shocks

Country capacity and resilience

State Capacity
- Macroeconomic imbalances
- Below average service delivery in urban areas

Rules of the Game
- Weak political institutions
- High corruption

Social Contract
- Unified polity
- Weak political parties

Civil Society
- Relatively strong and active

External stabilising factors

Political/Institutional
- EU and regional relationships focused on hard security and migration control

Economic
- FDI flat-lined
- Strong limits on EU migration

Political instability and continued economic crises
• Even in the best case political and economic scenarios risks of instability remain high across the region into the 2020’s

• Regional vulnerability to global economic forces - and lack of internal integration – will remain high. Effective external support remains an important pillar of stability.

• The main underlying driver of structural instability is weakness of regional (non-fossil export) economies in meeting the aspirations of their growing populations. Fossil fuel exports are masking some risks which will emerge later.

• Stability will also be impacted by other “known unknowns” such as Islamic militancy, impact of unresolved conflicts (Syria, Libya) and regional state-to-state competition.
• Resource and climate change risks will be a growing threat to stability, as will the shifting strategic context of energy and climate policy. BAU climate change will be a major direct source of instability by mid-century.

• Climate and resource pressures will impact stability through two key routes:
  – Providing increasing shocks to living standards through volatile and rising global food and energy prices.
  – Depressing output in critical areas of the economy such as tourism, agriculture and energy

• Mal-adaptation may lead directly to social tensions: e.g. in rural Egypt

• The region is ill-fitted to compete in the growing low-carbon goods markets of their major export market the EU.

• There are also potential risks from international disputes over the Nile Basin management and accelerated migration from SSA.
Impact of “status quo” interventions in 2020’s

- Economic reform packages are not reducing structural vulnerability to global market shocks. 2013 will be difficult.

- Generic economic development policies are unlikely to accelerate economic growth fast enough to deliver stability – except in the best case for Egypt.

- Post-crisis Europe seems unlikely to open up agricultural, goods, electricity or labour markets at a scale which would make a decisive economic or political difference to stability.

- The role of BRICs investors and regional players (Turkey, Gulf) will become increasingly important in delivering infrastructure and FDI. However, these countries also compete for key European markets.

Need to directly address vulnerabilities and turn low carbon and resource constrained future from a risk into an opportunity
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The “ABC” Risk Management Framework

• **Aim** to mitigate to stay below 2°C;

• **Build** and budget for resilience to 3-4°C;

• **Contingency** plan for capability to respond to 5-7°C

Elements same for all countries/actors **but** goals will differ; there is no universal risk management approach

Source: “Degrees of Risk”, E3G 2011
1. **Improve resilience to shocks**: refocus investment to address immediate resilience challenges over food, water and energy.

2. **Economic diversification into resource efficient industries**: support new industries which are sustainable under future resource stresses and climate policy contexts.

3. **Build resilient infrastructure**: in the national resource and social context – including shifting from hard to soft solutions.

4. **Rationalise external support on resource pressures**: focus current disparate avenues of external support and engagement on a few high impact stability and development objectives.
1. Improve Resilience to Shocks

1. **Improve resilience to shocks**: refocus investment to address immediate resilience challenges over food, water and energy.

   - Address energy price vulnerability and energy subsidy reform through integrated packages of price reform, social support and energy efficiency. Draw on international climate finance to smooth transition and provide up-front financing.

   - Develop packages of water management reforms based on efficiency, community management and targeted investment in areas of high potential water and social stress.

   - Assess the sustainability of food and agriculture policy in the region under the full range of scenarios of food prices and volatility. Reassess focus of support to export agriculture vs. national food security based policies.
2. Economic diversification into resource efficient industries: support new industries which are sustainable under future resource stresses and climate policy contexts.

- Countries should stress test national development plans against a range of resource, trade, energy policy and climate change scenarios.

- Analyse actual potential of individual countries to develop competitive advantage in clean energy exports to Europe and the wider region.

- Carry out scoping studies for low carbon zones (LCZs) as a potential driver of economic diversification and industrial development. Explore linking LCZs to EU trade preferences.

- Develop active industrial strategies around existing investment in renewable energy and in resource efficiency sectors to drive development of local supply chains.
3. Build resilient infrastructure:

- Develop explicit national infrastructure planning assumptions and assessments for a range of resource scarcity, low carbon trajectory and climate change scenarios to 2040.

- OECD public investment – including public-private partnerships - should assess the resilience of their investments under different scenarios and put forward equivalent demand reduction alternatives for all new supply side investments in energy and water.

- Undertake a comprehensive review of planned water, food control and sewage infrastructure to develop alternative investment packages based on demand reduction, community control, and natural management in a way that improves social resilience.
4. **Rationalise external support on resource pressures**: focus disparate avenues of external support on a high impact stability and development objectives.

- The EU and engaged Member States should to carry out strategic assessment of how their related trade, migration, energy and aid policies impact stability in the region, and assess where reforms can be made to increase the impact of external support.

- Assess aid delivery and allocation structures to ensure they can blend different funding streams to mitigate resource scarcity and climate change related risks.

- The European External Action Service should convene European and regional governments to identify a common view on the highest priority areas for international support to regional electricity interconnection projects.

- OECD countries should initiate a dialogue on sustainability and stability with regional and BRICs investors active in developing critical infrastructure in the region. Aiming to align short term competition with mutual interest of ensuring medium term stability.
Prioritising Stability

• Driving resource efficiency and resilience at scale requires stronger and more sophisticated governance.

• Given the multiple stresses on transitional governments there is a bias toward using mature models of infrastructure and economic development.

• Failing to invest in preventive measures now will generate future risks that require additional capacity to manage.

• Targeted external support can provide one way to bridge this apparent tension between addressing the immediate and the important.
Delivering Stability in Practice

- Reducing instability and managing resource stresses is not the same as generic development.

- The immaturity of national plans in these areas donors need to work with countries to ensure investment programmes are rigorously assessed against future resource challenges.

- Administrative rules for climate finance must allow this to be blended with other forms of development and stability funds.

- European governments should review their development and climate finance prioritisation in the MENA region to ensure that energy, resource and climate change drivers of instability can be tackled effectively.
Risk Analysis Methodology

Political, Economic and Security Analysis

Literature and expert review of political landscape

Economic and social analysis

Analysis of external policy and economic context

Synthesis

Instability Framework 2012

Climate, Resource and Energy Analysis

Climate, Energy and Resource trends analysis

Analysis of links between instability and energy, resource and climate change

Economic and investment trends analysis

Augmented Instability Framework 2025

Policy Options

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Strategy Development Methodology

Forward Policy and Investment Assessment

Augmented Instability Framework 2020/30

- Policy Options
- Country and regional development plans
- International policy and public investment
- International climate policy and regional energy/resource policy

Synthesis

- Impact of "status-quo" policies on stability
- Risks and opportunities

Strategic Proposals

- Overall strategic analysis of stability
- Priority investments to improve stability
- Priority regional policy initiatives to improve stability
Informal consultation in G8 and MENA countries

Policy workshops Washington and Brussels

Expert workshops (Berlin and London)

Draft strategic analysis

Policy workshops Washington and Brussels

Final report with recommendations

Revise report

Engagement with policy makers and investment institutions on design of MENA support package