The Mediterranean in 2030: routes to a better future

SUMMARY

IT IS UNCERTAIN what the destiny of countries bordering the Mediterranean shall be over the next twenty years. It might be decline. We might see diverging growth rates and different levels of participation in globalization; or there could be convergence and definitive allegiance to a system of mutual interdependence from the three shores of the Mediterranean. The future is sufficiently open for all three of these scenarios to be possible. It is therefore reasonable to work on a hypothesis of convergence taking place, wherein European countries share a common future with countries South and East of the Mediterranean. What should governments and civil society stakeholders do to strengthen and accelerate the probability of convergence? The Mediterranean 2030 project sets out 10 propositions.

The Mediterranean 2030 project involves bringing together all public and private foresight bodies in countries bordering the Mediterranean. The aim is to work together to produce a foresight study, propose representations of this common future, and in particular decide together which actions need to be implemented now so that the convergence scenario can become a reality in twenty years' time. As Maurice Blondel once said, "One does not predict the future, one prepares for it".

PARTNERS

Albanian Council on Foreign Relations (Albania)

Centre for Mediterranean Middle East and Islamic studies – University of Peloponnese (Greece)

Euro-Mediterranean Consortium for Applied Research on International Migration (CARIM)

Euro Mediteranski Forum (Croatia)

Haut Commissariat au Plan (Morocco)

Information and Decision Support Center (Egypt)

Institut Europeu de la Mediterrania (Spain)

International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM) – IAMM Montpellier

Institut de Prospective Économique du Monde Méditerranéen (IPEMED)

Mauritanian center for policy analysis (Mauritania)

«Mauritania visions 2030» project

Ministry of Science, Education and Sports of the Republic of Croatia

Tunisian Insitut for competitiveness and data studies (Tunisie)

Tunisian Institute for Strategic Studies (Tunisia)

Frédéric Blanc, Delegate general of FEMISE

Larabi Jaïdi, University Mohammed V Rabat- Agdal (Morocco)

Cécile Jolly, Centre for Strategic Analysis (France),

Choghig Kasparian, Director of the Observatory of socio-economic reality (Ourse) (Lebanon)

Robert Kasparian, former General Director of the Lebanese Statistic Administration (Lebanon)

Salam Kawakibi, Arab Reform Initiative

Hervé Le Bras, School of Studies in Social Sciences (France)

Ali Marouani, University Paris 1 Panthéon-Sorbonne (France)

Tawfiq Mouline, General Director of the Royal Institute for Strategic Studies (Morocco)

THE MEDITERRANEAN area has developed a fabric of economic, political and human relations that lend it a definite regional dimension. However, this integration is highly varied, depending on the country or sub-region concerned. The European Union plays a central role for all Mediterranean countries, which might be members or future members, or have established agreements and privileged economic relationships with it. Although Latin Europe, the Adriatic countries (western Balkans), the Middle East and the Maghreb display geographical continuity, from an economic, institutional and socio-cultural point of view, their heterogeneity is obvious. The Mediterranean is in progress and is the object of political and private investment. The motivation behind such investment might be grounded in economics, politics, citizenship, society, ecology or culture, depending on countries and their inhabitants. But these initiatives all tend to weave closer what history has done and undone, to accelerate convergence towards a better state of being for the region, and to speed up its global ranking as compared to world economic giants. In this context, a Mediterranean foresight study appears crucial.

At first sight, the diagnosis is not particularly favourable to Mediterranean integration. Income convergence between countries in the Mediterranean is not significant; exchanges of goods and capital have made less progress within the region than with other global trade zones (e.g. emerging countries). The growth of investment flows coming from the Gulf States has strongly influenced the Mediterranean Arab countries towards developing real estate, telecommunications and, to a lesser extent, financial services. The diversification of exchanges of goods and capital could represent an opportunity if it were accompanied by a rise in both quality and technology, resulting in productivity gains that encourage growth and employment. It is undeniable that the centrifugal dynamics of Europe have not led to a major investment flow (it stagnates at around 2%) sparking off significant technological transfers, nor to industrial joint processing comparable to that organized with Eastern European countries or within emerging Asia.

IN CATCHING UP WITH EUROPE, the Mediterranean region has taken advantage of past dynamics of global growth drawn by emerging countries. Yet this growth remains low in comparison with that of the world's most dynamic geographical areas. Europe's demographic slowdown and weak productivity gains mean that it has entered into a low-level zone. In 2030, India and China's combined population will be 3 billion, representing 25% of global GDP, compared with 12% today and only 3% in 1990. This shift in the world economy brings with it brand-new market opportunities as well as the possibility of global income convergence and an exit from poverty. But it also brings the risk of marginalizing the least dynamic regions. The Euro-Mediterranean region could thus be confronted with a weakening of its capacity to influence international regulations that will affect its future as economies continue to look outwards. China and America's handling of an exit from the crisis indicates a move away from multipolarity. This domination of state continents and emerging markets could have the effect of imposing a more unequal and less protective social model on the Mediterranean region in the race to be the most attractive. The effect would be to maintain low work conditions in the South and accentuate labour market duality and fears of outsourcing in the North. Although emerging countries' economic power will equal that of advanced countries by 2030, income per inhabitant will not experience the same progression : they will be rich as a whole, but individually poor, thus increasing the global workforce competition. Obviously, perspectives might be more open if the new geopolitical context lead us to a multipolar world, and if emerging countries, under domestic social pressure, put in place fairer social systems.

Synergies for a fully Mediterranean vision

YET THERE ARE CLEAR Euro-Mediterranean complementary features. First, there is a **demographic synergy** between an ageing Europe, facing a probable drop in workforce numbers affecting potential growth, and the South and East Mediterranean countries, where high numbers of more qualified young people are entering the job market due to investment in education (between 20% and 60% of the population will have been educated to secondary level or above by 2030 in many countries). In 2030, 40% of the potential workforce will be on the East and South shores of the Mediterranean, and 60% in Europe (including the western Balkans), compared with 30% and 70% today. In the future, the politically viable count unit will be one billion inhabitants. The EU27 with its current boundary will stagnate around 500 million and the addition of the Euro-Mediterranean would help approach this target.

Although in the future there will be a larger workforce in the South, **work dynamics remain uncertain**. Maintaining the current rate of job creation in Europe (1.3%) would result in a workforce deficit of 40 million by 2030, even if working lives are extended. Symmetrically, maintaining rates of job creation in South and East Mediterranean countries (2%) will not be sufficient in 2030 to substantially reduce unemployment rates and "formal" inactivity, which are both high in the region (including a significant economic share of informal "subsistence" work). Although additions from one side will not automatically make up for lacks on the other side, due to both compartmentalized work markets and restrictive migration policies, two factors argue for greater mobility within the Euro-Mediterranean region: (i) it could compensate for the weaknesses of intra-European mobility and make up sectorial labour deficits (caring professions, hotels and catering, construction work); (ii) it could strengthen qualification levels of workers from the South and the Balkans and their capacity to adapt to the needs of the economy, and encourage more circular migration.

The synergies of natural resources also make the case for greater regional integration. Such synergy is obviously energy-related, not just because of fossil energy, but more especially due to the natural availability of renewable resources in South and East Mediterranean countries (e.g. 1 m^2 of the Sahara is equivalent to a barrel of petrol, wind speed in the South ranges from 6 to 11 m/s). It could also be agriculture-based: Europe being more crop- and meat-centred, with relatively abundant arable land and water resources but with now marginal agricultural employment, and the South maintaining high rural work figures but with Mediterranean production threatened by water stress, rampant urbanization and the impact of climate change. Paradoxically, although the Mediterranean diet is esteemed in Europe, cereal crops are the mainstay of consumption in the South and East Mediterranean. Complementarities between consumption and natural resources will be reinforced in 2030: in the South by a population and income growth increasing its cereal consumption, and in the North by a concern for diet (obesity), which will move food choices towards fruit and vegetables. Once again, the resources of some countries will not automatically fulfil the requirements of others in a global market where emerging powers fuel the market and attempt to get hold of increasingly scarce natural resources.

Euro-Mediterranean synergies should not be limited to asymmetrical complementary trade, the South being a supplier of natural resources and primary goods with low added value, and the North providing sophisticated, more expensive goods. "Natural" resources are themselves not only sources of "malediction" but also tend to become scarcer, which increases their comparative short-term benefits and imposes a transition that shall already be largely underway by 2030. Whatever the availability of natural resources, which varies greatly from country to country, **supply logic should be replaced by demand logic**. This is true for energy and the environment, where the solution to scarcer resources (water and energy) and environmental security depends just as much, if not more, on the "savings" that can be made (e.g. lower energy intensity, water supply management), than it does on technological progress and fossil fuel alternatives. Regarding agriculture, pursuing a supply logic would lead to the disappearance of food-producing farming and create difficult rural, social and environmental challenges. In the North, it would tend towards intensive farming, which is detrimental to employment, rural development and ecological balance.

Moving from a supply logic to a demand logic involves **encouraging the creation of solvent markets** rather than maintaining those economies catching up with Europe in a demeaning subcontracting role differentiated only by wage levels. Instead of transforming such countries into low-cost platforms destined for the common market (a role already fulfilled by Turkey and Croatia and to a lesser extent the Maghreb), the emphasis should be on proximity, which guarantees quality (particularly for health and the environment), and responsiveness. The rising trend of transportation costs in the mid-term (insufficient oil substitutes) and their environmental impact, the chronic resurgence of health-related incidents linked to importing low-cost goods, the increased variability of demand and the convergence of consumption patterns on both sides of the Mediterranean all confirm this hypothesis. The decision to tighten up location choices on a regional basis could lead to the progressive reduction of differences in salary and work conditions. Greater mobility of labour would be an additional factor in the tendency to curb wage inequality, reinforcing the social acceptability of Mediterranean offshoring and outsourcing.

In this context, **renewal of the Euro-Mediterranean's production organization shall also involve services**, which all countries can provide. This not only means promoting each country's comparative advantages – with Europe specializing in services with high added value, and South and East Mediterranean countries specializing in service support (e.g. tourism, transport and telecommunications with a slight progression in medical and financial services) – it also involves increasingly synergies between goods and services, leading to more deep-rooted and harmonious Euro-Mediterranean integration. There are no services without goods, as illustrated by the boom in mobile phone industry (physical goods and related services). In the same way, transport and distribution services go hand in hand with food and energy industries. Services add the highest levels of value to mass-produced goods produced cheaply in different places round the world. In addition, the exchange of services fosters the harmonisation of standards that, along with multilateral trade liberalization, are the first obstacles to trade. Services impose the circulation of people, through the provision of services or freedom of establishment, thus promoting the convergence of skills and wages. In the long term, they will allow a development less focus on possessing physical goods, thus allowing a lower consumption of natural resources.

Lastly, **individuals' values converge in the Mediterranean**, due to the high level of migration, where the circulation of ideas and people goes hand in hand with more homogenous lifestyles and aspirations. This lifestyle convergence is most obvious in the South and East Mediterranean with the rise of individualism, characterized by less emphasis on the extended family and a mistrust of institutions, which are victim to the same disaffiliation as in Europe. Fertility patterns are close to those of Europe and aspirations to freedom and well-being are translated by a desire to emigrate, most radically amongst the young. Once again, the idea is not to renew "cultural" domination, which would only give force to the "clash of civilizations" theory (S. Huntington), but to make foundations on genuine points of convergence with a respect for differences. Just as Europe has built a nation from nations, the Mediterranean should be built on its cultures.

Taking up common challenges

EURO-MEDITERRANEAN economies do not create enough jobs. South and East Mediterranean rentier economies' low employment performances can be explained by their tendency towards weak entrepreneurship and innovation and the public sector's predominance over the private one. In Europe, just as it is catching up the technological gap with the United States, the working population has dropped to an extent that cannot be made up by investment alone. Overall, productivity gains will be crucial to future growth both in North and South. These productivity gains will be achieved through three fundamental factors: a distinct improvement in human capital (in the South) and its circulation (in the North), rationalized organization of production and improved performances in technology and innovation. In these three domains, the bases of existing cooperation would be worth reinforcing, thus accelerating the transfer of technology and know-how.

Mediterranean economies must also adapt to greater energy restraint and the preservation of natural resources. For hydrocarbon-producing economies, this will involve thinking beyond oil (apart from Libya, oil and gas production should peak in 2020-2025). Importing countries should reflect on diminishing the energy intensity of growth and creating economies that respect the environment more. If nothing is done, even taking into account the progress made and current projects for developing renewable energy sources, energy demand in the South and East will be enough to cancel out efforts made in Europe to fight climate change. Although the effects of climate change are set to be more severe in the Mediterranean than in the world as a whole, countries in North Africa, the Middle East and the Adriatic will have less means to protect themselves (income), even though they have contributed little to global warming (their greenhouse gas emissions, although rising, are well below European averages). These negative effects will add to the already difficult agroclimatic conditions in the South and East Mediterranean (pressure on water resources of over 100% according to Plan Bleu, use of farming land of over 80% by 2030 according to the FAO, urbanization set to rise by 60% according to the United Nations). In this context, a more sustainable development calls for the transfer of mainly European technologies and skills to promote eco-activities and the rationalized use of natural resources. Ecotechnologies are today's market

opportunities and they could find a foothold in the Mediterranean, particularly in countries that need to create new installations rather than upgrade old ones. Their cost, often still higher than that of less sober technologies, will need public incentives, possibly involving a Euro-Mediterranean "sharing" of funding with the aim of establishing a kind of environmental equity.

In addition to the predicted worsening of agro-climatic conditions in the Mediterranean, **the 2008 food crisis put the focus on agriculture and rural life issues**. It forced states to rethink agricultural policies and food security, to try to regulate trade and secure supplies. The halt of rural densification South and East of the Mediterranean in 2015 and the reform of the European CAP by 2013 should constitute ideal opportunities for reorganizing farming within a Euro-Mediterranean framework. This would include ensuring food safety for inhabitants, strengthening agricultural systems that produce local jobs and revenues, and organizing intensive farming to respect the environment. Quality management could prevail over quantity management, with labelling for Mediterranean products, highlighting the "services" it provides in terms of health, nutritional and environmental quality and proximity. This kind of development would lead to more added value for Mediterranean production and accelerate North/South investment in agriculture, the professionalization of different types of production and improve farmers' qualifications. This more "Mediterranean" orientation for agricultural policy could be compensated by a contribution from cereal production to set up a form of market price stability and a supply guarantee by constituting security stocks and setting up a North-South agreement.

The last Mediterranean challenge is that "Mediterranean" migration is set to continue. This is due to both push factors (e.g. differences in demographics and income between the two shores, economic emergence which encourages the migration of middle classes who risk losing status) and pull factors (lack of labour in Europe along with high unemployment, desire to attract highly qualified workers, deeper regional integration). Yet, although they constitute undeniable factors for development and for social, economic and cultural integration, the balance between brain drain and brain gain on one side of the Mediterranean, and between economic advantage and social "losses" on the other, is controversial to say the least. A policy for Euro-Mediterranean mobility could nevertheless be based on the already perceptible development of migration from the South and East (including the Balkans): migrant flows will become more educated than in the past, with migration perceived as only part of a process to increase experience, skills and qualifications, involving return trips. Euro-Mediterranean mobility should be based on this type of circular, qualifications-based migration and seen as an addition to (and not a replacement of) integration policies for migrants, which are currently a political priority in both arrival and departure countries. Such a policy calls for preconditions regarding the transportability of rights and recognition of qualifications, but its valorisation appears to be an indispensable development if mobility can hope to represent stability and prosperity.

Mediterranean future threatened by marginalization or divergence

The marginalization scenario: bottom-up convergence

A CONTINUATION OF CURRENT trends (European growth rates under 2% per year, close to 3-4% in South and East of the Mediterranean and in the Balkans) would not be conducive to Mediterranean convergence. In 2030, income gaps between countries would not have closed up, and specialization in South and East Mediterranean countries would remain confined to low-quality, low-tech products. A slow-down in rural areas would not be compensated by the creation of new activities. It would increase environmental pressure (with CO_2 emissions in South and East Mediterranean countries equalling Latin Europe's stabilized levels by 2030). And it would not resolve the employment issue in the North, where restrictions on migration flows combined with a drop in the number of people in work would limit growth potential; nor in the South, where weak work dynamics would mean that over half the population is inactive and employment rates are close to 10%, with the informal market playing an adjustment variable role. The Balkan countries would be confronted with the same difficulties (inactivity rates slightly above 50% and unemployment rates slightly below 10%), with the simultaneous appearance of insufficient local and sectorial workers. In this context, migratory pressure remains high, essentially fed by differences in income, while migration policy restrictions are increasingly strict in North and South, affecting both low qualified and qualified workers.

THE 2008 CRISIS could contribute to making the picture even more negative. South European countries have been made fragile by the crisis. They are also the European countries that make the most dynamic Euro-Mediterranean cross-exchanges, since trade remains strongly influenced by proximity, as do migratory movements. A durable slow-down in these economies, impeded by the Euro zone's fixed exchange rates and without solidarity from the Euro zone, would lead them to a withdrawal from investments and trade with countries neighbouring the Balkans and the South Mediterranean. Euro-Mediterranean institutional integration would remain limited and planned enlargement postponed indefinitely. The UfM would lack projects and the liberalization of services could be hindered by fears of social dumping. This sluggish growth in Latin Europe could lead to global marginalization of the Mediterranean area due to economies' interdependence (the Balkans, Turkey and the Maghreb essentially trading with Europe). More likely still, in economies south of the Mediterranean and the Balkans, it could also lead to transfers of capital from the Gulf and emerging countries making low-cost investments in a high-yield zone (as well as a diversion of trade towards these countries). A kind of bottom-up Mediterranean convergence would work in this way, where all the countries catching up with Europe would get close to European Mediterranean income levels, but with a marked European divergence.

Divergence scenario: disparate insertion in the world economy

DIVERGENCE THREATENS the Mediterranean more than marginalization does. The upset in the world economy's dynamics could take things this way, with winners and losers at national and regional level. Growth, drawn by emerging countries, could reinforce competition to the detriment of purchasing power and domestic demand. The industrial specializations of the Western Balkans and the South Mediterranean could approach those of Eastern European countries, turning them into a new low-cost platform for the European Community and providing emerging countries with a good position for penetrating the EU market. World economy's dynamics, more than Euro-Mediterranean one, would benefit the most competitive economies that have already been catching up: Croatia would overtake Portugal in per capita income; Turkey, Tunisia and ex-Yugoslavian countries would get close to it, deepening the gap with other North African countries (Algeria and Egypt), the Middle East (Lebanon and Jordan) and the Adriatic (Albania), whose growth would be less dynamic. In Europe, potential growth of Greece and Portugal would also be weakened by balance of payment difficulties and public debt, increasing both intra-Mediterranean and intra-European divergence. The Euro-Mediterranean process would make progress in terms of agricultural liberalization, but this would not be compensated by transfers, thus accentuating rural exodus in the South and agricultural concentration in the North. The liberalization of services would be limited to some service provisions, without going as far as freedom of establishment, lending weight to labour selection based on qualifications.

IN THIS CONTEXT, in addition to environmental pressures linked to economic growth and income, the Mediterranean Sea's position as a world-economy transit site would be accentuated, benefiting from new opportunities for developing trade yet with deeper impacts in terms of pollution, loss of biodiversity and paving the coastline. This scenario would further emphasize the duality of economies and territories (marginalization of inland areas, coastline development) and lead to the development of export outlets for industry and agriculture to the detriment of production for domestic markets. Employment and activity rates would rise in the Mediterranean as a whole, but unequally: unemployment would decrease but remain high in the South and East of the Mediterranean and the Balkans (9% to 10%), Europe would manage to partially make up for its loss of activity by facilitating migration mostly for qualified workers (EU Blue Card), at the price of an appreciable extension of working life. Labour market duality would remain marked in North and South, emphasizing inequality between a globalized elite integrated in world trade, compared with low-qualified workers subject to increased flexibility in the North and a drop in working conditions and wages in the South. For energy, progress in the use of renewable resources would be balanced by increased demand resulting in a rise in greenhouse gas emissions, which would be as pronounced around the world as in the trend scenario, with more marked national differences. The Euro-Mediterranean agricultural decline would be accompanied by a strong penetration of suppliers' market from the rest of the world (meat and cereal crops). While strictly "Mediterranean" production (fruit and vegetables, olive oil and wine) that had not received labelling would be under stiff competition from produce from afar (Chile, Australia, Brazil and China).

Another future is possible: the top-down convergence scenario

A DIFFERENT FUTURE could exist for the Mediterranean, involving neither divergence nor marginalization, hinged on proactive political action shared by all inhabitants and applied with the help of multipolar international regulations. A stronger and richer economic growth in terms of employment involves developing Euro-Mediterranean synergies, extending certain means of redistribution and protection to the whole of the Mediterranean and strengthening competitiveness. Such a scenario would imply an enforced institutional framework in which the perspectives of access to the European Union or to the European internal market will foster the harmonization of norms as showed by examples of Croatia and Turkey as well as the new member states. In a regionally integrated system (i.e. regional establishment of the four EU freedoms, access to the European domestic market and standardized norms), accompanied by enhanced cooperation open to South and East Mediterranean countries, internal levers for growth could result in increased regional productivity and employment. All countries in the region would then attain *per capita* incomes of over USD 10,000 by 2030. Activity rates in South and East Mediterranean and Adriatic countries would be close to those of Europe, where more circular and better "integrated" migration would fill in the labour gaps and fuel consumer markets.

What can be done?

TO OBTAIN CONVERGING regional performances that are more socially and territorially balanced, it is not enough to simply open up trade, since this has a limited impact in a global economy. Liberalizing services could be a more vigorous growth factor, but trade and work dynamics cannot be reinforced without a standardization of norms, without which liberalization shall remain limited, as shall its potential to create income. In addition, encouraging internal levers for growth must involve rehabilitating social welfare systems, which are guarantees of sustained consumption and public support to allow people and goods to stand up to intensified global competition. Seen this way, setting up a Mediterranean "ecosystem" is the condition for its autonomy and growth. A number of recommendations centring on the major challenges and Euro-Mediterranean convergence factors are proposed:

1. Invest in human capital by encouraging mobility (authorise temporary migration for services under contract and projects co-funded by the UfM) and qualifications (create a common base and a Euro-Mediterranean network of vocational training courses and establish recognition-accreditation of skills and diplomas; support the Euro-Mediterranean University project and take ErasmusMed further, etc.).

2. Accelerate the transfer of knowledge, skills and technology by (1) encouraging the emergence of Euro-Mediterranean competitiveness and research clusters in sectors with high growth or rich in employment (information and communication technologies for services, farming and energy efficiency techniques, etc.); (2) narrowing down location choices to the region: setting up a system of regional preferences going beyond free trade, based on social, health and environmental quality criteria would contribute to accelerating the transfer of capital and know-how.

3. Create a common institutional area accompanied by transfers, an advanced status including funds for "pre-accession" to the domestic market (with the progressive establishment of the four freedoms of movement for goods, capital, services and people), and pursue discussions on accession for EU candidate countries.

4. Commence a Mediterranean certification process, initially centred on services and agriculture, with a Mediterranean label guaranteeing health quality (establishment of a health agency) and environmental quality for farming, and skills level and service quality for the provision of services.

5. Select UfM projects (co-funding) based on job creation potential and/or energy restraint.

6. Create a Mediterranean environment fund aimed at strengthening the capacity to adapt to climate change in South and East Mediterranean countries and the Balkans. It will also finance renewable energy transport's infrastructure and public transport as an alternative to roads, clean development projects that reduce greenhouse gas emissions, and projects for rationalizing water demand and energy efficiency, particularly in the residential-tertiary sector. Set up a Euro-Mediterranean solar fund.

7. Set up a Mediterranean investment bank, based on the same principles as the EIB, and designed to encourage funding for SMEs, which are key to the creation of wealth and jobs.

8. Enlarge transport networks in the South Mediterranean to facilitate South-South commercial exchanges, with a particular focus on multimodal transport to better optimize logistical costs.

9. Draw up a common food security policy (mutualized insurance for agricultural risk, constitution of security stocks and emergency intervention systems) and a rural development policy (tangible and intangible infrastructures for industries, managerial and technological training courses).

10. Create a permanent Euro-Mediterranean observatory responsible for monitoring the convergence or divergence of Mediterranean development, evaluating the efficiency of any measures taken towards Mediterranean integration, and raising public awareness of these issues in all countries concerned.

As well as the signatories, the following bodies participated in deliberations at the "Mediterranean 2030" consortium and supported its action: **The Centre for Applied and Foresight Studies** (Algeria); **CeSPi, Centro Studi di Politica Internazionale** (Italy); **Commissariat Général à la Planification et à la Prospective** (Algeria); **Mediterranean Energy Observatory** (France); **State Planning Organization** (Turkey); **The Direction of Foresight studies, Ministry of Foreign Affairs** (France)

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