

Statistics on European Neighbourhood Policy Countries: South

2020 edition



**Statistics on European
Neighbourhood Policy
Countries: South**

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Foreword

With continual evolution and development of both the European Union and the world at large, the European Neighbourhood Policy (ENP), one of the flagships of EU policy towards its neighbours, is as vital today as it was on its inception in 2004. In the face of great challenges, the principles of democracy, rule of law, respect for human rights and social cohesion, which the partnership between the EU and the neighbourhood countries is founded on, must be pursued with even greater vigor.

True measure of the progress made and indication of the right course going forward lies in reliable statistics based on harmonised methods. Eurostat is committed to strengthening the statistical systems and promoting evidence based decision making within the ENP-regions. In the ENP-South region, the principal vehicles for this commitment have been Eurostat's statistical cooperation activities and the four regional MEDSTAT programmes carried out in the years 1996-2019.



Statistics on European Neighbourhood Policy Countries: South gives an overview of the state of play within the region and the developments over the past decade in terms of social, economic, business and environmental issues. It is the product of the EU's statistical capacity building activities and the active cooperation between Eurostat and the national statistical offices in the EU's Southern neighbourhood countries. I want to thank the national offices for the good cooperation and for their dedication to continuous improvements of the statistical systems.

I am looking forward to our future collaboration, exchange of views and new programmes in strengthening our partnership — EU and Eurostat remain to be dedicated partners to countries of this region.

Eduardo Barredo Capelot

Director of Methodology, Dissemination and Cooperation in the European Statistical System, Eurostat

Statistics on European Neighbourhood Policy Countries: South — 2020 edition

The 2020 edition of *Statistics on European Neighbourhood Policy Countries: South* presents up-to-date series of key statistical data for nine partners — Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine ⁽¹⁾ and Tunisia — also known as the ENP-South countries, as well as data for the EU. It has not been possible to collect recent data from Syria which is therefore not covered by this publication.

The tables, figures and associated commentary and methodological notes concern key social, economic and environmental themes for which data are collected annually from the European neighbourhood policy countries through a series of harmonised questionnaires. Most tables and figures in the publication are followed by data codes, which link directly to the associated tables within Eurostat's free dissemination database (Eurobase): the codes generally link to datasets that cover the European Union (EU), individual EU Member States, European Free Trade Association (EFTA) countries and sometimes enlargement and other non-member countries.

COVID-19 pandemic and its impacts

The *Statistics on European Neighbourhood Policy Countries: South* is published intermittently with annual data. This 2020 edition describes the situation in the EU and the Southern neighbourhood countries up to the year 2019. Consequently, first findings of any COVID-19 related implications are not included.

⁽¹⁾ This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

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Algeria

Office national des statistiques

Website: <http://www.ons.dz>

Egypt

Central Agency for Public Mobilization and Statistics

Website: <http://www.capmas.gov.eg/HomePage.aspx>

Israel

Central Bureau of Statistics

Website: <http://www.cbs.gov.il/EN/pages/default.aspx>

Jordan

Department of Statistics

Website: <http://dosweb.dos.gov.jo>

Lebanon

Central Administration of Statistics

Website: <http://www.cas.gov.lb>

Libya

Bureau of Statistics and Census Libya

Website: <http://www.bsc.ly>

Morocco

Direction de la Statistique, Haut-Commissariat au Plan

Website: <http://www.hcp.ma>

Palestine

Palestinian Central Bureau of Statistics

Website: <http://www.pcbs.gov.ps/default.aspx>

Tunisia

Institut National de la Statistique

Website: <http://www.ins.tn/en/front>

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Introduction and reading guide



Introduction

Policy background

The European neighbourhood policy (ENP) — established in 2004 — reflects the European Union's (EU) wish to build on common interests with partner countries and commitment to work jointly in key priority areas, including in the promotion of democracy, rule of law, respect for human rights, and social cohesion. Through the ENP, the EU offers partner countries potential greater access to the EU's market and regulatory framework, standards and internal agencies and programmes.

The ENP is a key part of the EU's foreign policy. The ENP partner countries form two groups, those to the east of the EU referred to as the ENP-East countries and those mainly situated around the eastern and southern shores of the Mediterranean referred to as the ENP-South countries. Action plans setting out an agenda for political and economic reforms with short and medium-term priorities have been developed with many of the ENP-South countries. They reflect the state of each country's progress in terms of its relations with the EU.

The EU supports the attainment of the objectives of the actions plans through: financial support; economic integration and access to EU markets; easier travel to the EU; and technical and policy support. Once a year, the European Commission and the High Representative of the European Union for Foreign Affairs and Security Policy publish reports assessing the progress made towards the objectives of the action plans.

The relations with ENP-South countries were modified by the European neighbourhood

policy review that took place in 2015. The review was adopted on 18 November 2015 through a joint communication (JOIN(2015) 50 final) of the European Commission and the High Representative of the European Union for Foreign Affairs and Security Policy. The revision of the ENP focused on six main topics:

- stabilising the neighbourhood;
- moving from a 'one-size-fits-all' approach to the principle of 'differentiation', to reflect the ambitions and commitment of each partner country and increase ownership and partnership;
- promoting good governance, democracy, rule of law and human rights;
- joint priorities for cooperation, including: economic modernisation and entrepreneurship, employment with a focus on youths, partnership for growth, reform of the security sector, migration and mobility;
- the 'regional dimension' in view of the Eastern Partnership and the Union for the Mediterranean and outreach beyond the ENP countries;
- more effective delivery of support and assistance.

In terms of the formal reporting structures of the ENP, the consultation process suggested that the existing action plans and progress reports should be revised to reflect current priorities, in line with the new generation of association agendas. Future reports will be shorter, simpler and more focused and flexible; reporting will take place at political meetings under the relevant political agreements.

For more information about the ENP, see: https://eeas.europa.eu/diplomatic-network/european-neighbourhood-policy-enp_en

For more information about the action plans, see: https://eeas.europa.eu/headquarters/headquarters-homepage/8398/enp-action-plans_en



Statistical cooperation

Among the EU Member States, statistics are coordinated by Eurostat, the statistical office of the EU, through the European Statistical System. The European Statistical System is based on the harmonisation of statistical concepts, methodologies, definitions and methods which enable the collection of reliable, robust and comparable statistics among EU Member States, European Free Trade Association (EFTA) and enlargement countries.

Eurostat shares its expertise with non-member countries within the framework of its

international statistical cooperation activities — supporting, upgrading and enhancing the statistical systems of these non-member countries. The beneficiaries of this support include:

EU enlargement countries (candidate countries or potential candidates);

- ENP countries
 - in the ENP-East area; and
 - in the ENP-South area;
- African, Caribbean and Pacific countries;
- Latin American countries;
- Asian countries.

For more information, see: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Statistical_cooperation_-_introduction

Statistical cooperation with the ENP-South countries

In the light of the revitalised ENP strategy, the importance of official statistics has been reinforced and the need for international cooperation in statistics renewed; statistics need to capture the situation in a country in both static and dynamic forms, helping policymakers identify needs, formulate objectives and orientate policies; statistics need to enable progress towards agreed goals to be monitored and measured — a key component of governance. Statistics are also needed to inform and support the dialogue and exchanges between the EU and its partners in the Mediterranean regions, within the framework of the ENP and the Union for the Mediterranean. To meet this need, the EU and the ENP-South countries have been working together for a number of years to strengthen statistical systems in the region, particularly through the Medstat

programmes, although assistance to Syria is currently suspended (and Libya has not been an active participant in the past).

Eurostat supports the European Commission's technical assistance programmes in the ENP-South countries by:

- providing statistical assistance to national statistical authorities;
- encouraging best practice and the transfer of know-how through mutual contacts, training, study visits, workshops and seminars;
- participating in the collection, validation and dissemination of a wide range of data;
- assisting countries in the process of harmonisation towards European Statistical System and/or international standards.

By publishing data for the ENP-South countries, both in this publication and through its free, public reference database (Eurobase), Eurostat is playing a key role in improving the transparency for these countries.

For more information, see: [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Statistical_cooperation_-_European_Neighbourhood_Policy-South_\(ENP-S\)](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Statistical_cooperation_-_European_Neighbourhood_Policy-South_(ENP-S))

Reading guide

Publication structure

The main body of *Statistics on European Neighbourhood Policy Countries: South — 2020 edition* contains tables, figures, commentary and explanations structured into 11 chapters covering statistics on a variety of topics: population; health; education; labour market; economy and finance; international trade in goods; agriculture, forestry and fishing; tourism; communications and transport; energy; and environment.

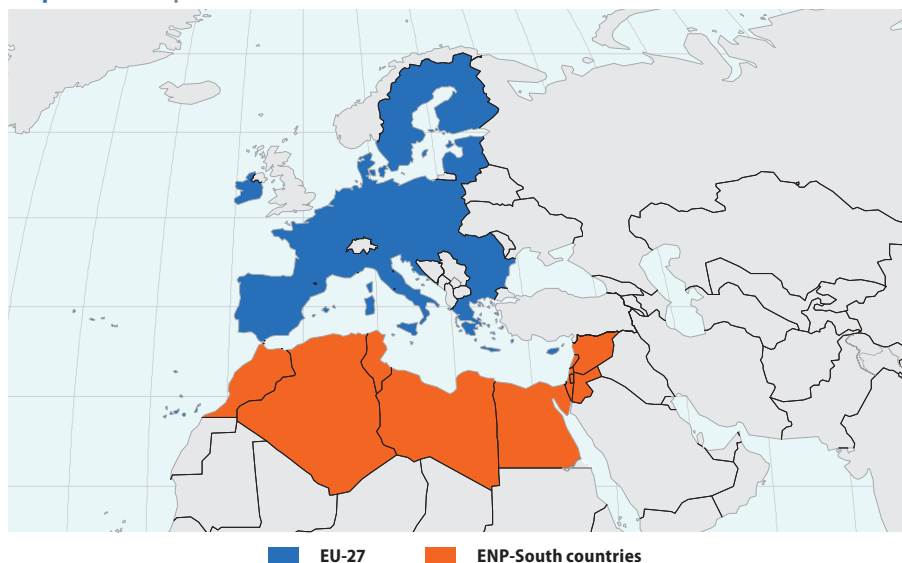
Spatial coverage

Unless otherwise indicated, the EU aggregates that are presented in this publication for the

purpose of comparison cover the 27 Member States (as of 1 February 2020) throughout the period considered in each table and figure, regardless of whether there were 27 or 28 members of the EU in the reference year concerned. In other words, the data have been calculated backwards with a stable geographical coverage. Data are shown for nine of the individual ENP-South countries, namely: Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine (⁽¹⁾), and Tunisia. No recent data are available for Syria which is therefore not covered by this publication. Map 1 shows the location of the EU Member States as well as the ENP-South countries.

(⁽¹⁾) This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

Map 1: the European Union and the ENP-South countries



Administrative boundaries: © EuroGeographics © UN-FAO Cartography: GISCO 01/2020
Projection: Robinson

The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the European Union.

Table 1 provides an overview of a number of key indicators for the EU and each ENP-South country: the number of inhabitants, the size of

each economy (as measured by GDP) and the average standard of living (as measured by GDP per capita).

Table 1: Key indicators, 2018

	Population (thousands)	Gross domestic product	
		Total (billion EUR)	Per inhabitant (EUR)
EU-27 ⁽¹⁾	446 106	13 483.9	30 160
Algeria ⁽²⁾ (³)	41 263	146.5	3 441
Egypt ⁽³⁾ (⁴)	96 279	172.7	1 834
Israel	8 798	313.4	35 293
Jordan ⁽⁵⁾	10 053	35.4	3 608
Lebanon ⁽⁴⁾	:	47.3	:
Libya	6 663	:	:
Morocco	35 220	99.8	2 835
Palestine	4 794	12.4	2 582
Tunisia ⁽³⁾ (⁶)	11 551	38.9	3 485

(¹) Gross domestic product per inhabitant: rounded value.

(²) Population: 2017.

(³) Gross domestic product: based on 1993 system of national accounts.

(⁴) Gross domestic product: 2017.

(⁵) Gross domestic product: 2016.

(⁶) Mid-year population. Gross domestic product: 2015.

Source: Eurostat (online data codes: [demo_pjan](#), [nama_10_gdp](#) and [nama_10_pc](#))

Timeliness

The data presented in this publication were collected from the ENP-South countries between September and December 2019 or extracted from Eurobase in January and February 2020. As Eurobase is updated regularly, some data in this publication may have been revised already. The accompanying text was drafted in January and February 2020.

Data sources

The EU-27 data that are presented in this publication have been processed and calculated by Eurostat on the basis of information provided by the national statistical authorities of the Member States, with or without estimates. These data are available from Eurobase through the following link: <https://ec.europa.eu/eurostat/data/database>.

Data for ENP-South countries are collected for a wide range of indicators each year through a questionnaire that is sent by Eurostat to the ENP-South countries: these data are supplied by and under the responsibility of the national statistical authorities. A network of contacts in each country has been established for updating these questionnaires, generally within the national statistical offices, but potentially including representatives of other data-producing organisations (for example, central banks, finance and other government ministries).

The vast majority of the statistics on ENP-South countries that are included in this publication are freely available through the following link: <https://ec.europa.eu/eurostat/web/european-neighbourhood-policy/enp-south/data/database>.

Data for the EU and the ENP-South countries from other sources are used in this publication to a limited extent and are identified in the source under each table and figure.

The publication of data for the ENP-South countries does not constitute the expression of an opinion by the European Commission on the legal status of a country or territory or on the delimitation of its borders.

Eurostat data code

Data codes have been inserted after most tables and figures to help readers access the most recent data on the Eurostat website: the data codes link directly to the associated tables within Eurobase. The codes generally contain the data for the EU as well as data for individual EU Member States and EFTA countries in most cases; in some cases data for a wider range of non-member countries are included.

In the PDF version of this publication, data codes under the tables and figures are presented as internet hyperlinks. The data on Eurostat's website are frequently updated and may therefore differ

from those presented in this publication and often contain more detailed data.

Exchange rates

For some indicators, monetary values were provided by the ENP-South countries in national currency terms. In a limited number of cases, the information provided was sent in an alternative denomination (usually United States dollars). In these cases, the series were converted using exchange rates (annual averages for the reference year in question) so that data for all indicators are denominated in the same currency.

While the conversion to a common currency unit facilitates comparisons of data between countries, it is important to understand that changes in exchange rates are partially responsible for movements identified when looking at the development of a time series for an indicator that is denominated in euro. Table 2 provides information on the annual average exchange rates between the euro and the currencies of the ENP-South countries for the period 2008-2018. Note that Palestine does not have a national currency.

Table 2: Euro exchange rates, annual averages, 2008-2018

(1 euro = ... national currency)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Algeria	94.99	101.33	98.61	101.53	99.62	105.41	107.05	111.72	121.14	125.37	136.86
Egypt	7.990	7.734	7.453	8.258	7.781	9.124	9.403	8.533	11.097	20.089	20.983
Israel	5.267	5.469	4.950	4.977	4.953	4.797	4.747	4.312	4.250	4.062	4.244
Jordan	1.044	0.990	0.941	0.988	0.912	0.943	0.943	0.788	0.786	0.802	0.839
Lebanon	2.217	2.103	1.999	2.099	1.937	2.002	2.003	1.673	1.669	1.703	1.781
Libya	1.800	1.748	1.679	1.704	1.621	1.689	1.690	1.532	1.539	1.575	1.612
Morocco	11.35	11.25	11.15	11.25	11.09	11.16	11.16	10.83	10.85	10.96	11.09
Palestine	–	–	–	–	–	–	–	–	–	–	–
Tunisia	1.812	1.883	1.898	1.960	2.007	2.158	2.255	2.176	2.378	2.733	3.126

Source: Eurostat

Symbols, units and abbreviations

Statistical data are often accompanied by additional information, for example concerning the quality or status of the data. In figures, all additional information is provided by way of footnotes. The following symbols are used in tables:

<i>Value in italics</i>	provisional data, estimates or forecasts (in other words, data that are likely to change)
:	shown where data are not available, confidential or unreliable
—	shown where an indicator is not relevant

MEASUREMENT UNITS OR SCALARS

%	percentage
billion	1 000 million
EUR	euro
GWh	gigawatt hours
head	unit of measure for counting the number of (farm) animals
kg	kilogram
kgoe	kilogram of oil equivalent
km	kilometre
km ²	square kilometre
tonne (t)	1 000 kg
toe	tonne of oil equivalent

ABBREVIATIONS

CAP	common agricultural policy
EFTA	European Free Trade Association
ENP	European neighbourhood policy
ESA	European system of accounts
EU	European Union
EU-27	European Union of 27 Member States (as of 1 February 2020)
FDI	foreign direct investment
GDP	gross domestic product
ISCED	international standard classification of education
PDF	portable document format

1

Population



Population size and structure

The total population of eight of the ENP-South countries (no recent data for Lebanon) was 214.6 million persons, based on the latest available data (see Table 1.1), which was equivalent to approximately 48.1 % of the total number of inhabitants in the EU-27 in 2018. Egypt was the most populous of the ENP-South countries with 96.3 million inhabitants in 2018, while Algeria (41.3 million in 2017) and Morocco (35.2 million) were the second and third largest. The populations of Israel, Jordan and Tunisia were in the range of 8.8-11.6 million. By contrast, Libya (6.7 million) and Palestine (4.8 million) had the smallest populations among the ENP-South countries. To give some idea of the relative size of the populations of the ENP-South countries, the total number of inhabitants in Egypt was larger than that of Germany (82.8 million; the most populous of the EU Member States), while Algeria's and Morocco's populations were slightly larger and slightly smaller respectively than that of Poland (38.0 million).

Population density is a measure that expresses the total number of inhabitants per square kilometre (km²). In the EU-27, there was an

average of 109 inhabitants per km² in 2017; note that there were considerable differences across the European Union (EU) territory, both between EU Member States and between different regions of the same Member State. The three largest ENP-South countries — Egypt, Algeria and Morocco — were characterised as having lower levels of population density than in the EU-27 as did Tunisia (2016 data). It should be noted that these are countries with large areas of sparsely populated desert and their population density is much higher in urban areas. By contrast, some of the most densely populated ENP-South countries were also some of the smallest — both in relation to their land area and in relation to their number of inhabitants. For example, the 4.8 million inhabitants of Palestine lived, on average, with a population density that was 7.3 times as high as in the EU-27 and higher than the population density in the Netherlands (504 inhabitants per km²), the EU's second most densely populated Member State after Malta (1 548 inhabitants per km²). Israel was also relatively densely populated, with a ratio that was around 3.6 times as high as the EU-27 average while the density in Jordan was slightly higher than that in the EU-27.

Table 1.1: Population and population density, 2018

	Population as of 1 January (thousands)			Population density (inhabitants per km ²)
	Total	Male	Female	
EU-27 ⁽¹⁾	446 106	217 837	228 269	108.6
Algeria ⁽²⁾	41 263	20 898	20 365	17.3
Egypt	96 279	49 635	46 644	96.6
Israel ⁽³⁾	8 798	4 364	4 434	387.4
Jordan	10 053	5 323	4 730	113.2
Lebanon	:	:	:	:
Libya	6 663	3 380	3 283	:
Morocco	35 220	17 544	17 676	46.0
Palestine	4 794	2 439	2 355	795.7
Tunisia ⁽⁴⁾	11 551	5 732	5 819	68.4

(¹) Population density: 2017.

(²) 2017.

(³) Population density: excluding Israeli settlements in the West Bank.

(⁴) Mid-year population. Population density: 2016.

Source: Eurostat (online data codes: [demo_pjan](#) and [demo_r_d3dens](#))

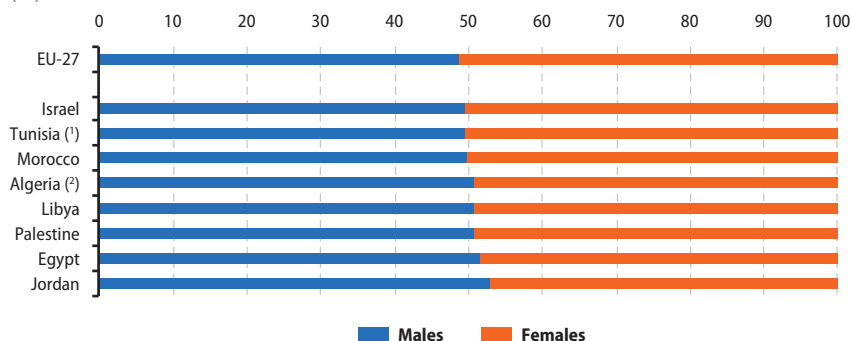


The EU-27 population was composed of 105 women for every 100 men in 2018; this reflects the greater longevity of women. All of the ENP-South countries recorded lower ratios of women to men than did the EU-27, with five of the eight for which data are available reporting that men were in the majority (less than 100 women per 100 men).

Figure 1.1 shows these differences between the sexes in an alternative presentation. Women accounted for 51.2 % of the total population of the EU-27 in 2018. In Jordan, women made up 47.1 % of the population, equivalent to 89 women per 100 men.

Since the industrial revolution, it has been common to find populations increasing at a relatively rapid pace in most western economies (other than during periods of war). However, more recently it has become commonplace to observe population ageing, which results from, among other factors, consistently low birth rates and higher levels of life expectancy. These changes have transformed the shape of age pyramids with a transition towards far fewer children being born and much older population structures; in some cases these patterns have resulted in falling population numbers.

Figure 1.1: Structure of the population by sex, 2018
(%)



Note: Lebanon, not available.

(1) Mid-year population. Estimates.

(2) 2017.

Source: Eurostat (online data code: [demo_pjan](#))

Population change may be defined as the difference in the size of a population between two given time periods (usually a period of one year, for example, the difference in the number of inhabitants on 1 January between two consecutive years). Population change has two distinct components:

- natural population change (in other words, the number of live births minus the number of deaths);

- net migration (in other words, the number of immigrants minus the number of emigrants; it should be noted that net migration as referred to in the context of population change statistics includes also the statistical adjustments occurring in the annual balance of the population).

A positive population change (or population growth) occurs when the result of net migration plus net natural population change (live births

minus deaths) is positive. With relatively low fertility rates across much of Europe, it has become quite common for negative rates of natural population change to occur, in other words, more deaths than births during a calendar year. In these cases, migration provides a means to rebalance population numbers so that the total number of inhabitants remains unchanged or continues to grow. However, there are multiple push and pull factors that affect migratory patterns, and net migration into one country is, by definition, counter-balanced by net emigration from another. The latter is particularly common among countries characterised by conflicts/war, relatively low living standards or human rights violations.

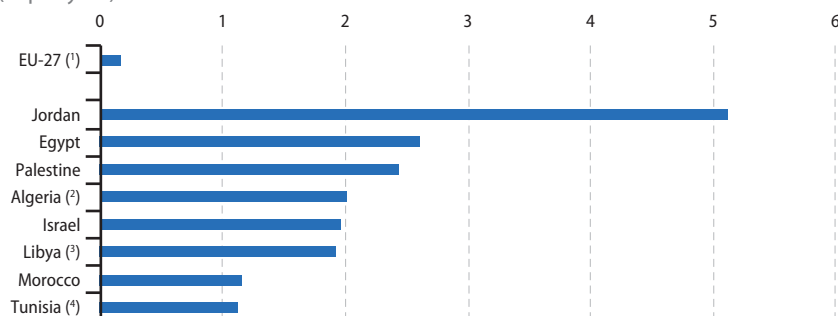
Statistics on population change are increasingly used to support policymaking and provide an opportunity to monitor demographic behaviour within political, economic, social and cultural contexts. These statistics can be used to support a range of different analyses, for example, studies relating to population ageing and its effects on the sustainability of public finances and welfare, an evaluation of fertility as a background for

family policies, or the economic and social impact of demographic change.

During the most recent 10-year period for which data are available (2008-2018), the total number of inhabitants in the EU-27 grew at an average rate of 0.2 % per annum (see Figure 1.2). There was faster population growth in all eight of the ENP-South countries for which recent data are available. The lowest rates of population growth were recorded in Tunisia (1.1 % per year) and Morocco (1.2 % per year). In most of the remaining ENP-South countries the average rate ranged from 1.9 % to 2.6 %, although much faster population growth (5.1 % per year on average) was observed in Jordan.

A similar analysis based on absolute numbers reveals that the total population of Egypt increased by 21.8 million inhabitants between 2008 and 2018. During the same period, the populations of the other ENP-South countries also increased, up 6.8 million in Algeria (between 2008 and 2017), 3.9 million in Jordan, 3.8 million in Morocco and 1.0-1.6 million elsewhere (no time series available for Lebanon).

Figure 1.2: Annual average change in the population, 1 January 2008-2018
(% per year)



Note: Lebanon, not available.

(1) Break in series.

(2) 2008-2017.

(3) Estimate.

(4) Mid-year population. Estimate.

Source: Eurostat (online data code: [demo_pjan](#))



Table 1.2 and Figure 1.3 show the structure of the population by age for the EU-27 and the ENP-South countries. In 2018, the share of the elderly — defined here as those aged 65 years and over — in the total population of the EU-27 was 20.0 %. This was higher than in any of the ENP-South countries,

reflecting among other factors greater longevity among the EU population. By contrast, those aged 65 years and over accounted for 3.2-3.9 % of the total population in Palestine, Jordan and Egypt, 6.1 % in Algeria (2017 data), 6.9 % in Morocco, 8.6 % in Tunisia and 11.6 % in Israel.

Table 1.2: Age class structure of the population on 1 January, 2008 and 2018
(%)

	< 15 years		15-24 years		25-64 years		≥ 65 years	
	2008	2018	2008	2018	2008	2018	2008	2018
EU-27⁽¹⁾	15.5	15.2	12.3	10.7	55.0	54.2	17.3	20.0
Algeria⁽²⁾	28.2	29.5	21.7	15.6	44.8	48.9	5.3	6.1
Egypt	32.1	34.2	21.6	18.2	42.4	43.7	3.9	3.9
Israel	28.4	28.3	16.0	15.0	45.9	45.1	9.8	11.6
Jordan	:	34.3	:	19.9	:	42.1	:	3.7
Lebanon⁽³⁾	24.8	:	19.8	:	47.6	:	7.8	:
Libya	:	:	:	:	:	:	:	:
Morocco	29.0	26.6	20.0	17.0	45.2	49.5	5.8	6.9
Palestine	42.8	38.7	20.9	20.5	33.2	37.6	3.1	3.2
Tunisia⁽⁴⁾	24.3	25.0	20.0	14.0	48.8	52.3	7.0	8.6

(¹) Break in series.

(²) 2017 instead of 2018.

(³) 2009 instead of 2008. Excludes Palestinian refugee camps in Lebanon. Based on survey data rather than the population registered on 1 January.

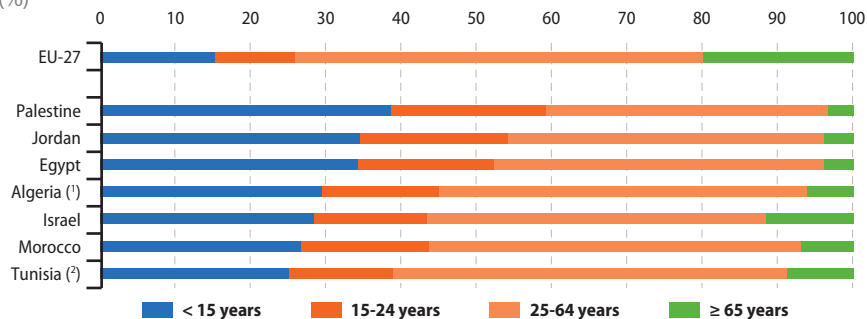
(⁴) Mid-year population.

Source: Eurostat (online data code: [demo_pjangroup](#))

At the other end of the age spectrum, children aged less than 15 years accounted for 15.2 % of the EU-27 population in 2018. This share reflects, to some degree, the relatively low fertility rates recorded in most EU Member States. All of the ENP-South

countries recorded higher shares of children in their total population, as the lowest share was 25.0 % in Tunisia. By contrast, the share of children in the population was more than twice as high in Egypt, Jordan and Palestine as it was in the EU-27.

Figure 1.3: Age class structure of the population on 1 January, 2018
(%)



Note: Lebanon and Libya, not available.

(¹) 2017.

(²) Mid-year population. Estimates.

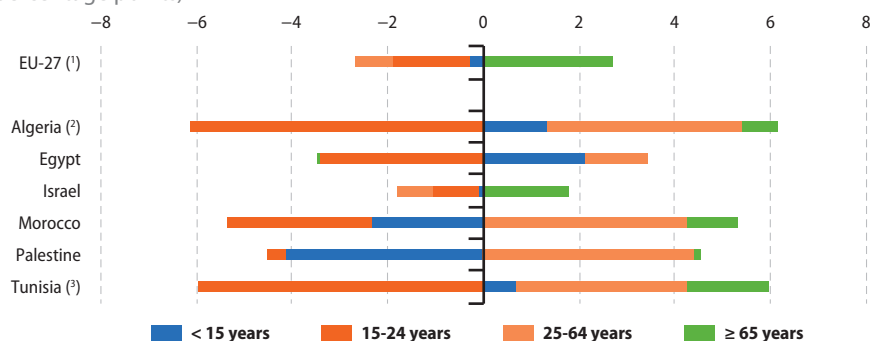
Source: Eurostat (online data code: [demo_pjangroup](#))

As noted above, the growth in the relative share of older people in the EU-27 population may be explained by increased longevity, a pattern that has been apparent for several decades as life expectancy continues to rise. This development is often referred to as ‘ageing at the top’ of the population pyramid and may be attributed, among other factors, to medical advances, lifestyle changes and a shift in the types of work that are carried out, with a move away from farming and heavy industry towards more sedentary occupations.

Within the last decade for which data are available (2008–2018), the share of the elderly in the total EU-27 population rose by 2.7

percentage points. Alongside this increase in the share of relatively old persons, one of the most important structural changes in the EU-27 population is a reduction in the relative size of the working-age population (see Figure 1.4). The relative shares of the three younger age groups in the EU-27 population fell, in part due to consistently low levels of fertility over many years which have contributed to population ageing. As the proportion of people of core working age (25–64 years) in the EU-27 is shrinking while the relative share of elderly persons is expanding, one may expect an increased burden on those of core working age to provide for the social expenditure required by the ageing population.

Figure 1.4: Change in the age class structure of the population, 1 January 2008–2018 (percentage points)



Note: Lebanon, Libya and Jordan, not available.

⁽¹⁾ Break in series.

⁽²⁾ 2017 instead of 2018.

⁽²⁾ Mid-year population. Estimates.

Source: Eurostat (online data code: demo_pjangroup)

The pattern of population change in most of the ENP-South countries was quite different, insofar as the relative share of core working-age population continued to increase in most of the countries for which data are available, the only exception being Israel. On the other hand, there were reductions in the relative shares of young people aged 15–24 years in all of the ENP-South countries for which data are available, often falling substantially. Turning to the oldest end

of the age spectrum, ENP-South countries were generally characterised by increasing shares of older people in their populations, although there was a very small contraction in Egypt. At the other end of the spectrum, the share of children aged less than 15 years within the population increased in Egypt, Algeria (between 2008 and 2017) and Tunisia, while it fell strongly in Morocco and Palestine.

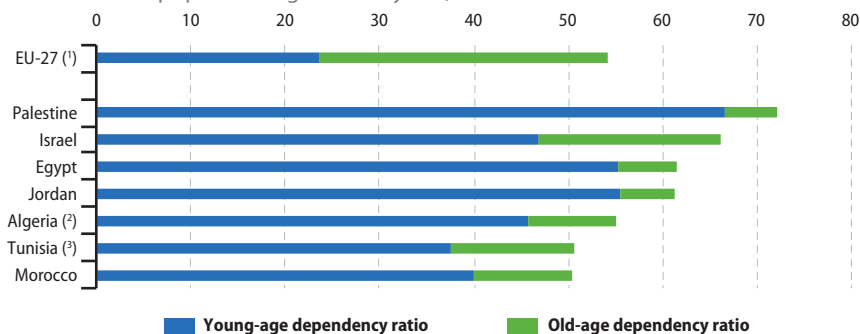


Age dependency ratios may be used to study the level of support that can potentially be given to younger and/or older persons by the working age population. The old-age dependency ratio for the EU-27 was 30.8 % in 2018 (see Figure 1.5); as such, there were 3.2 persons of working age for every person aged 65 years and over. Old-age dependency ratios in the ENP-South countries were consistently below the average for the EU-27, ranging from 6.0 % in Jordan to 19.2 % in Israel.

Within the EU-27, there were 4.3 working age persons for every child aged less than 15 years; as such, the young-age dependency ratio for the EU-27 was 23.5 % in 2018. Among the ENP-South countries this ratio was considerably higher than in the EU-27. The lowest ratios were 37.6 % in Tunisia and 40.1 % in Morocco, while by far the highest was 66.6 % in Palestine, where there were 1.5 working age adults per child.

The combination of young and old-age dependency ratios provides the total age dependency ratio, calculated as the ratio of dependent people (children and the elderly) compared with the population considered to be of working age (15–64 years). In 2018, this ratio was 54.3 % in the EU-27, indicating that there were slightly fewer than two working age persons for every dependent. Morocco and Tunisia were the only ENP-South countries to report lower values, as their total age dependency ratios were 50.4 % and 50.6 %. Ratios for four of the five other ENP-South countries for which data are available — Algeria (2017 data), Jordan, Egypt and Israel — were situated within the range of 55.2–66.2 %, while in Palestine the particularly high young-age dependency ratio contributed strongly to a total age dependency ratio of 72.2 %.

Figure 1.5: Young and old-age dependency ratios, 2018
(% relative to the population aged 15–64 years)



Note: Lebanon and Libya, not available. Ranked on the total (young-age and old-age) dependency ratio.

(*) Provisional.

(*) Estimates.

(*) 2017.

Source: Eurostat (online data code: demo_pjanind)

Births and mortality

The crude birth rate in the EU-27 was 9.5 per 1 000 inhabitants in 2018 whereas the crude death rate was slightly higher at 10.5 % (see Table 1.3). Consequently, the EU-27 recorded a negative rate of natural population change. In all seven of the ENP-South countries for which recent data are available, crude birth rates were considerably higher than crude death rates. The

narrowest gap was in Morocco where there were 3.3 times as many births as deaths resulting in 11.9 more births than deaths per 1 000 inhabitants. The widest gap was in Palestine where there were 8.0 times as many births as deaths resulting from 26.7 more births than deaths per 1 000 inhabitants. As such, all of the ENP-South countries recorded a positive rate of natural population change.

Table 1.3: Crude birth and death rates, 2008, 2013 and 2018
(per 1 000 inhabitants)

	Crude birth rates			Crude death rates		
	2008	2013	2018	2008	2013	2018
EU-27 ⁽¹⁾	10.6	9.7	9.5	9.8	10.0	10.5
Algeria ⁽²⁾	23.6	25.1	25.4	4.4	4.4	4.4
Egypt	27.3	31.0	24.5	6.1	6.0	5.8
Israel ⁽³⁾	21.5	21.3	21.1	5.4	5.2	5.1
Jordan	30.1	28.6	23.3	7.0	6.1	6.0
Lebanon ⁽⁴⁾	21.5	:	:	5.6	:	:
Libya	:	:	:	:	:	:
Morocco	19.2	18.1	16.9	5.7	5.1	5.1
Palestine	32.6	32.6	30.5	4.4	3.8	3.8
Tunisia ⁽⁵⁾	17.7	20.5	19.4	5.8	5.7	5.5

⁽¹⁾ 2013 and 2018: break in series.

⁽²⁾ Birth rate: 2017 instead of 2018. Death rate: 2016 instead of 2018.

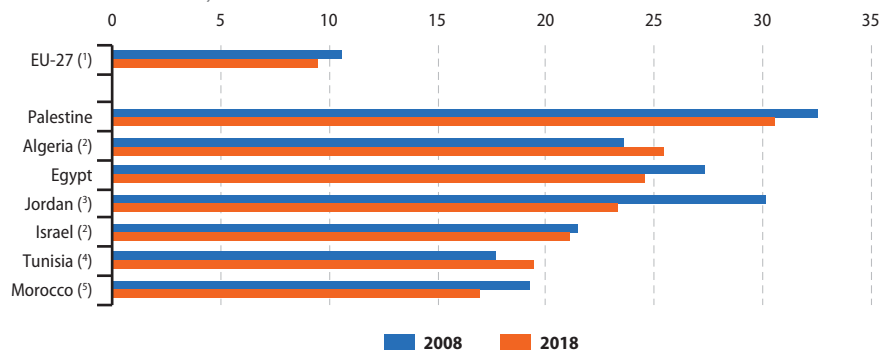
⁽³⁾ 2017 instead of 2018.

⁽⁴⁾ 2007 instead of 2008.

⁽⁵⁾ 2016 instead of 2018.

Source: Eurostat (online data code: [demo_gind](#))

Figure 1.6: Crude birth rates, 2008 and 2018
(per 1 000 inhabitants)



Note: Lebanon and Libya, not available.

⁽¹⁾ Break in series. 2018: provisional.

⁽²⁾ 2017 instead of 2018.

⁽³⁾ 2008: provisional.

⁽⁴⁾ 2008: provisional. 2016 (estimate) instead of 2018.

⁽⁵⁾ 2008: estimate.

Source: Eurostat (online data code: [demo_gind](#))



Life expectancy at birth for males in the EU-27 was 78.1 years in 2017, while the corresponding figure for females was 5.5 years higher (at 83.6 years). Israel (2018 data) was the only ENP-South country to record higher life expectancy at birth than in the EU-27 and this was true both for males and for females. At the other end of the range, the lowest levels of life expectancy in 2018 among the ENP-South countries for which data are available were recorded in Egypt for males (72.3 years) and in Jordan for females (74.2 years).

There was an increase in male and female life expectancy in the EU-27 between the years shown in Table 1.4 and this pattern was repeated in all of the ENP-South countries, most notably in Egypt and Morocco.

As in the EU-27, females in the ENP-South countries can expect to live longer than males (see Figure 1.7). While the gender gap for the EU-27 was 5.5 years (2017 data), the difference in life expectancy between males and females in the ENP-South countries was smaller, and was less than 2.0 years in Jordan in 2018 and in Algeria in 2017.

Table 1.4: Life expectancy at birth, 2008, 2013 and 2018
(years)

	Male			Female		
	2008	2013	2018	2008	2013	2018
EU-27 ⁽¹⁾	76.1	77.5	78.1	82.4	83.3	83.6
Algeria ⁽²⁾	74.8	76.5	76.9	76.4	77.6	78.2
Egypt	67.3	69.4	72.3	70.0	72.2	74.7
Israel ⁽³⁾	79.0	80.3	80.6	83.0	83.9	84.6
Jordan	:	72.7	72.8	:	76.7	74.2
Lebanon	:	:	:	:	:	:
Libya	:	:	:	:	:	:
Morocco	71.4	74.3	74.6	73.9	76.2	78.0
Palestine	70.2	71.5	72.8	72.9	74.4	75.1
Tunisia ⁽⁴⁾	72.4	73.9	74.5	76.3	77.2	78.1

⁽¹⁾ 2017 instead of 2018. 2013 and 2017: break in series.

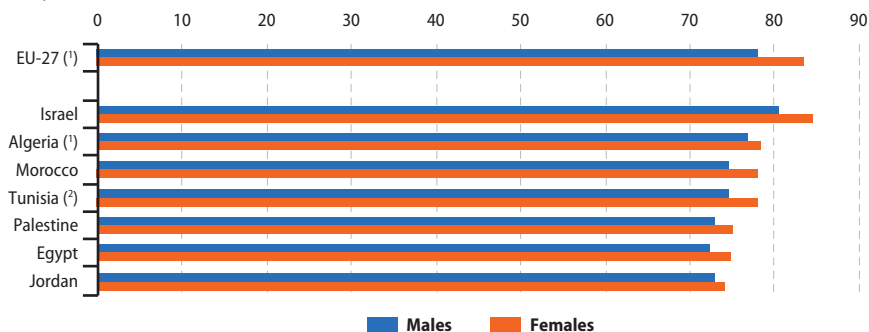
⁽³⁾ 2013: break in series.

⁽²⁾ 2017 instead of 2018.

⁽⁴⁾ 2016 instead of 2018.

Source: Eurostat (online data code: [demo_mlexpec](#))

Figure 1.7: Life expectancy at birth, 2018
(years)



Note: Lebanon and Libya, not available. Ranked on average for both sexes.

⁽¹⁾ 2017 instead of 2018.

⁽²⁾ 2016 instead of 2018. Estimates.

Source: Eurostat (online data code: [demo_mlexpec](#))

The infant mortality rate is defined as the ratio of the number of deaths of children under one year of age to the number of live births; the value is expressed per 1 000 live births and therefore excludes foetal deaths (stillbirths).

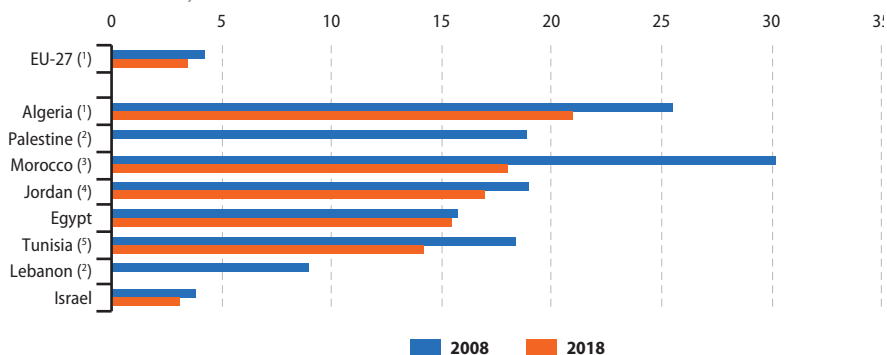
Falling infant mortality is one of the most significant changes affecting life expectancy, as barely 200 years ago it was commonplace for almost half of all new-borns to die while they were still young children. Even during the last 50 years there have been significant reductions in infant mortality rates across much of Europe.

In 2017, the EU-27 infant mortality rate was 3.5 per 1 000 live births. While infant mortality rates were generally higher among the ENP-South countries, Israel stood out as its rate (3.0 deaths per 1 000 live births; 2018 data) was below the average across the EU-27 (see Figure 1.8). Otherwise, recent infant mortality rates in the

ENP-South countries were between four and six times as high as in the EU-27, with rates ranging from 14.2 deaths per 1 000 live births in Tunisia (2016 data) up to 21.0 deaths per 1 000 live births in Algeria (2017 data).

During the period from 2008 to 2017 the infant mortality rate in the EU-27 fell from 4.2 to 3.5 deaths per 1 000 live births. Infant mortality rates have fallen at a rapid pace in most of the ENP-South countries in recent years, exceptions being Jordan and Egypt where they fell at a more subdued pace. Based on the data shown in Figure 1.8, Morocco recorded the largest relative fall in the infant mortality rate, down 40 % between 2010 and 2018. Tunisia (between 2008 and 2016) and Israel (between 2008 and 2018) observed rates falling by around one fifth. The smallest fall was recorded in Egypt, where the rate in 2018 was 1.9 % lower than it had been in 2008.

Figure 1.8: Infant mortality rates, 2008 and 2018
(per 1 000 live births)



Note: Libya, not available.

(1) 2017 instead of 2018.

(2) 2009 (estimate) instead of 2008. 2018: not available.

(3) 2010 instead of 2008.

(4) 2007 (provisional) instead of 2008.

(5) 2008: provisional. 2016 (estimate) instead of 2018.

Source: Eurostat (online data code: [demo_minfind](#))



Income distribution

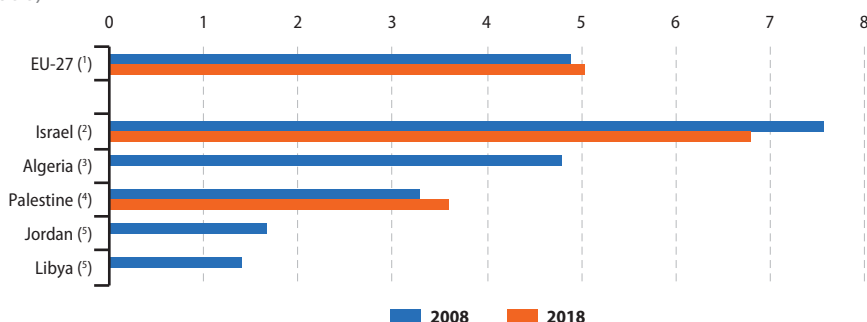
While money is not always the most important thing in life, it can often play an important role in determining an individual's quality of life, as people with more money generally tend to eat better food, live in better quality housing in safer neighbourhoods, send their children to better schools, enjoy more holidays, and participate in a wider range of leisure/recreation activities.

Income distribution measures provide a means of analysing economic inequalities, highlighting the gap between the rich and the poor in a society. The income quintile share ratio, also known as the S80/S20 ratio, is a measure of the inequality of income distribution: it is calculated as the ratio of the total income received by the 20 % of the population with the highest incomes (the top quintile) compared with that received by the 20 % of the population with the lowest incomes (the bottom quintile). Note that incomes are equalised to take account of the varying composition of households.

Figure 1.9 shows that the highest earners in the EU-27 (the top income quintile) had incomes in 2018 that were, on average, 5.1 times as high as the incomes of the lowest earners (the bottom quintile); this was a slightly higher ratio than in 2008, indicating that income inequality had widened somewhat.

Using the same measure, there was a higher degree of income inequality in Israel (compared with the EU-27) in 2018, as the income quintile share ratio was 6.8, although this had fallen from 7.6 in 2008. By contrast, there was a lower level of inequality in Palestine, where the ratio was 3.6 in 2017, up from 3.3 in 2009. Recent data are not available for the other ENP-South countries, although it is uncommon to see rapid changes for this measure. Based on the latest data available, the degree of income inequality in Algeria (2011 data) was slightly lower than in the EU-27, while in Jordan (2013 data) it was much lower.

Figure 1.9: Inequality of income distribution (income quintile share ratio), 2008 and 2018 (ratio)



Note: Egypt, Lebanon, Morocco and Tunisia, not available.

⁽¹⁾ 2010 instead of 2008. 2018: estimate.

⁽²⁾ Break in series.

⁽³⁾ 2011 instead of 2008. 2018: not available.

⁽⁴⁾ Estimates. 2009 instead of 2008. 2017 instead of 2018. 2009: based on consumption, not income.

⁽⁵⁾ 2018: not available.

Source: Eurostat (online data code: ilc_di11)

Since the global financial and economic crisis which started in 2008, much has been written about stagnating income levels in various developed world economies. This pattern has been particularly prevalent among relatively poor households, especially for people living in regions and working in activities that are exposed to the influence of globalisation. That said, even in countries where incomes have continued to rise, it has been commonplace for the rich to get richer, while the incomes of the poor have risen at a much slower rate, with the term 'left-behinds' being coined in reference to the cohort of low-income households.

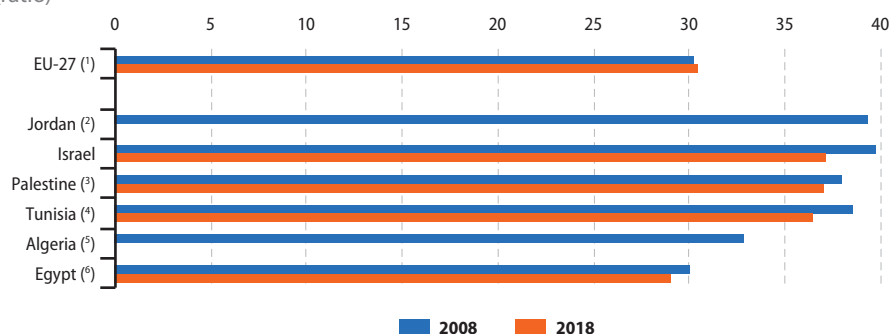
The Gini coefficient is an alternative measure of income inequality that may be used to illustrate income disparities. It shows the extent to which all incomes within the population differ from the average income: the closer the coefficient is to 100 the less equal are the incomes (a figure of 100 would mean that all of the income in an economy was received by a single person),

while the closer it is to zero the more equal are the incomes (a figure of zero would mean that everybody received the same income).

In the EU-27, the Gini coefficient in 2018 was 30. Apart from Egypt, each of the ENP-South countries for which data are available reported a Gini coefficient that was somewhat higher than the average for the EU-27. Egypt had the lowest Gini coefficient (29), while Israel, Palestine (2017 data) and Tunisia (2015 data; note also that the indicator definition is different) all recorded Gini coefficients of 37.

Between 2008 and 2018 the Gini coefficient remained stable in the EU. Data for a comparison over time are only available for four of the ENP-South countries, all of which recorded a fall in their Gini coefficient. In Israel, this reduction was during the period between 2008 and 2018, in Egypt and Palestine it was between 2009 and 2018, while in Tunisia it was between 2010 and 2015 (see Figure 1.10).

Figure 1.10: Gini coefficient, 2008 and 2018
(ratio)



Note: Lebanon, Libya and Morocco, not available.

⁽¹⁾ 2010 instead of 2008. 2018: estimate.

⁽²⁾ 2018: not available.

⁽³⁾ 2009 instead of 2008. 2017 instead of 2018. Estimates.

⁽⁴⁾ 2010 instead of 2008. 2015 instead of 2018. Data refer to budgetary Gini coefficient.

⁽⁵⁾ 2011 instead of 2008. 2018: not available.

⁽⁶⁾ 2009 instead of 2008.

Source: Eurostat (online data code: [ilc_di12](#))

2

Health



Health care expenditure

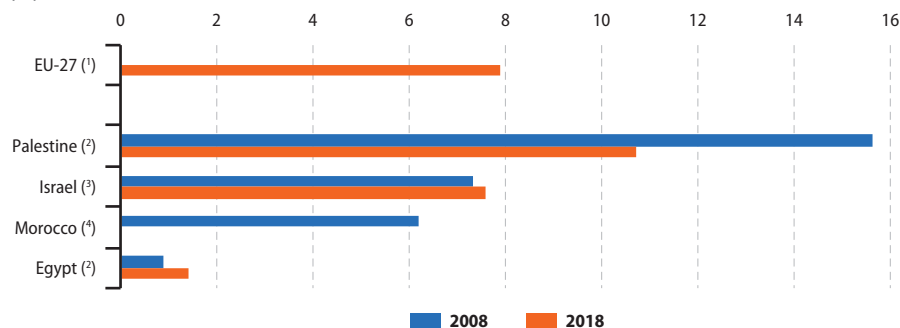
Healthcare systems around the world are financed and organised in different ways, but most Europeans would agree that universal access to quality healthcare, at an affordable cost to both individuals and society at large, is a basic need; moreover, this is one of the common values and principles of health systems in the European Union (EU).

Statistics on healthcare expenditure may be used to evaluate how a country's healthcare system responds to the challenge of providing quality healthcare. The level of current healthcare

expenditure relative to gross domestic product (GDP) was 7.9 % in the EU-27 in 2018. Among the ENP-South countries for which data are available (see Figure 2.1), the ratio of public expenditure on health relative to GDP was higher in Palestine (10.7 %; 2016 data) than in the EU-27. In 2018, Israel recorded a ratio of 7.6 %, similar to that in the EU-27, whereas public health expenditure in Egypt (1.4 % relative to GDP; 2016 data) was at a much lower level.

Between 2008 and 2016, public expenditure on health relative to GDP fell strongly in Palestine, while it increased in Israel between 2008 and 2018 and in Egypt between 2008 and 2016.

Figure 2.1: Public expenditure on health as a share of GDP, 2008 and 2018
(%)



Note: Algeria, Jordan, Lebanon, Libya and Tunisia, not available.

⁽¹⁾ 2008: not available. 2016 instead of 2018.

⁽²⁾ 2016 instead of 2018.

⁽³⁾ 2018: estimate. Includes also services provided by Israeli health providers to foreign citizens.

⁽⁴⁾ 2010 instead of 2008. 2018: not available.

Source: Eurostat (online data codes: hlth_sha11_hf and nama_10_gdp)

Healthcare resources

Some of the most important resources of any healthcare system are its staff, notably specialist personnel such as nursing professionals, midwives, physicians, dentists, pharmacists or physiotherapists for which data are presented in Table 2.1. Eurostat gives preference to the concept of ‘practising’ healthcare professionals — in other words, those who provide services directly to patients as consumers of healthcare — rather than licensed to practice or professionally active.

In 2017, there were more than 2.3 million nursing professionals in the EU-27, around 176 thousand midwives and 1.7 million practising physicians. In addition, there were around 343 000 practising dentists, 411 000 pharmacists and 553 000 physiotherapists. In order to compare healthcare personnel across countries it is common to create a ratio by dividing the number of personnel by the total number of inhabitants. In 2017, there were an estimated 595 nursing professionals and 372

physicians per 100 000 inhabitants in the EU-27, by far the most common types of healthcare personnel; note the geographical coverage for this aggregate varies by type of personnel (see Table 2.1 for more details).

In 2018, the number of nursing professionals (relative to population size) was considerably lower in all ENP-South countries for which data are available than in the EU-27. The highest ratio was 458 per 100 000 inhabitants in Israel (2017 data) while the lowest was 73 per 100 000 inhabitants in Morocco (2016 data for the public sector only). Equally, the number of physicians per 100 000 inhabitants was lower among the ENP-South countries than in the EU-27. The highest ratio was in Israel (310 per 100 000 inhabitants; 2017 data) and the lowest in Morocco (72 per 100 000 inhabitants, 2016 data for the public sector only).

For dentists and pharmacists a slightly different pattern was observed, with higher numbers per 100 000 inhabitants in Palestine than in the EU-27. Elsewhere among the ENP-South countries

Table 2.1: Healthcare personnel relative to population size, 2018
(per 100 000 inhabitants)

	Nursing professionals	Midwives	Physicians	Dentists	Pharmacists	Physio-therapists
EU-27 ⁽¹⁾	595	40	372	75	90	124
Algeria	:	:	:	:	:	:
Egypt ⁽²⁾	201	:	108	23	52	2
Israel ⁽³⁾	458	23	310	68	75	123
Jordan	83	16	:	7	8	:
Lebanon	:	:	:	:	:	:
Libya	:	:	:	:	:	:
Morocco ⁽⁴⁾	73	11	72	16	1	:
Palestine ⁽⁵⁾	342	:	180	94	160	:
Tunisia ⁽⁶⁾	241	:	131	5	23	:

(¹) 2017. Estimates. Nursing professionals, midwives, dentists and pharmacists: estimates (rounded to the nearest five per 100 000) made for the purpose of this publication based on the latest available data for each Member State. Nursing professionals: excluding Belgium, Czechia, Latvia, the Netherlands and Finland.

(²) 2017. Nursing professionals: includes all nurses.

(³) Except for midwives: 2017. Except for midwives and physicians: three year moving average. Midwives: licensed midwives under 67 years of age.

(⁴) 2016. Nursing professionals, midwives and pharmacists: public sector only.

(⁵) Physicians: 2017. Only registered in health association. Rounded data.

(⁶) Nursing professionals: nurses and carers in the public sector. Dentists: public sector.

Source: Eurostat (online data codes: hlth_rs_prsns, hlth_rs_phys, hlth_rs_prs1 and demo_pjan)

for which data are available the ratios were lower than in the EU-27, with Israel recording the second highest ratios for both of these categories of personnel. Data are only available for a few ENP-South countries for midwives and for physiotherapists: for midwives, all three countries for which data are available recorded lower ratios relative to the population size than did the EU-27, while Israel recorded almost the same ratio for physiotherapists as was observed in the EU-27.

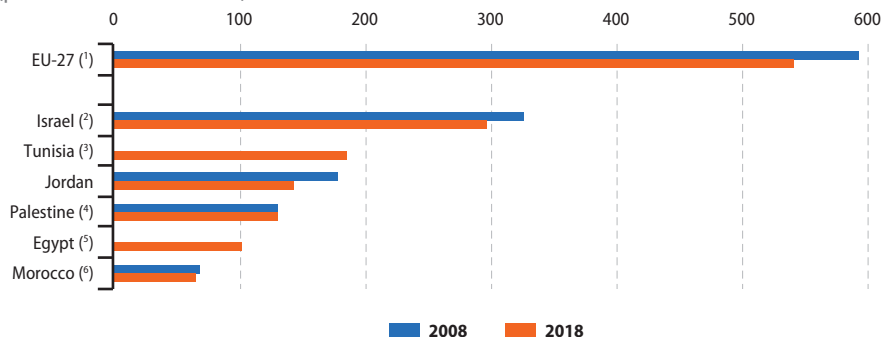
The number of hospital beds provides an alternative measure for analysing healthcare resources. The count of hospital beds concerns those beds that are regularly maintained and staffed and immediately available for the care of admitted patients; both occupied and unoccupied beds are included for curative care, long-term care and rehabilitative care.

In 2017, there were approximately 2.4 million hospital beds available for use in the EU-27; this equated to an average of 541 hospital beds per 100 000 inhabitants. In all of the ENP-South countries for which data are available the number of hospital beds relative to their population was lower than in the EU-27. The

highest ratio was in Israel at 296 per 100 000 inhabitants in 2018, equivalent to 55 % of the level in the EU-27. Elsewhere the availability of hospital beds was around one third of the EU-27 average or lower, with the lowest ratio in Morocco (2015 data for the public sector only).

Partly driven by cost considerations, patient well-being, and technical and medical advances, recent years have witnessed a significant change in the way that a variety of treatments are delivered, with increasing emphasis on out-patient services. This may explain, at least in part, why the number of hospital beds in the EU-27 decreased both in absolute numbers and in relative terms between 2008 and 2017, falling by 51 beds per 100 000 inhabitants. During the period 2008-2018, the number of hospital beds relative to population size also fell in three of the four ENP-South countries for which data are available, the exception being Palestine (see Figure 2.2) where there was no change. Relative to population size, the reduction in the number of beds was smallest in Morocco (down 3 beds per 100 000 inhabitants) and a roughly similar size in Israel and Jordan (down 31 and 35 beds per 100 000 inhabitants respectively).

Figure 2.2: Number of hospital beds relative to population size, 2008 and 2018
(per 100 000 inhabitants)



Note: Algeria, Lebanon and Libya, not available.

⁽¹⁾ 2017 instead of 2018.

⁽²⁾ Does not include beds in residential long-term care facilities.

⁽³⁾ 2008: not available.

⁽⁴⁾ Only registered in health association. Rounded data. Estimates.

⁽⁵⁾ 2008: not available. 2017 instead of 2018.

⁽⁶⁾ Public sector only. 2011 instead of 2008. 2015 instead of 2018.

Source: Eurostat (online data code: [hlth_rs_bds](#))

3

Education



Expenditure and schooling

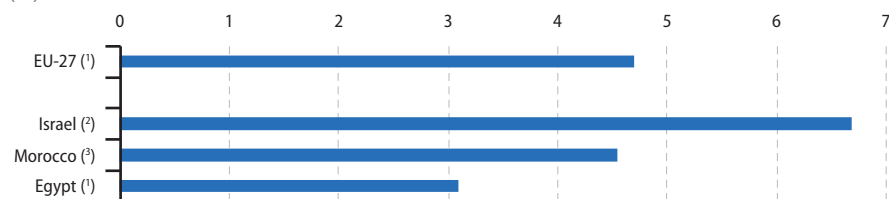
Access to quality education is considered fundamental for economic development. All countries stand to gain from better education through investing in a range of skills such as critical thinking, problem solving and digital literacy, which are increasingly relevant in service-based economies that are characterised by rapidly changing technological developments.

In 2017, public expenditure on education relative to gross domestic product (GDP) was 4.7 % in

the EU-27, while it was higher in Israel in 2018 (6.7 %), at a similar level in Morocco (4.6 %; 2016 data) and lower in Egypt (3.1 %; 2017 data) — see Figure 3.1.

In 2018, the length of compulsory education in the European Union (EU) Member States ranged from 8-13 years (see Figure 3.2). Among the ENP-South countries (no data available for Libya) the length of compulsory education was most commonly 9 or 10 years, with a shorter length required in Lebanon (six years) and a longer period in Egypt (12 years) and Israel (13 years).

Figure 3.1: Public expenditure on education relative to GDP, 2018
(%)



Note: Algeria, Jordan, Lebanon, Libya, Palestine and Tunisia, not available.

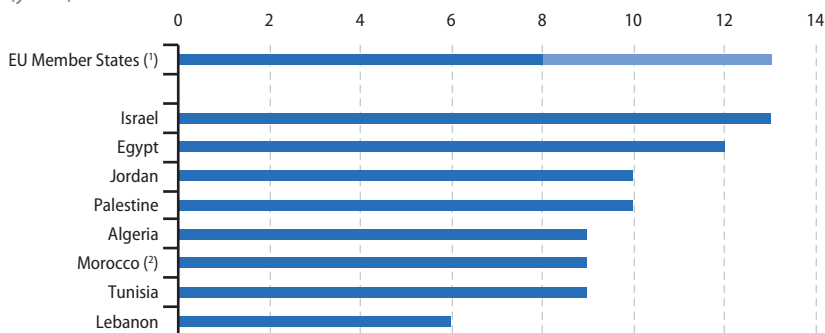
(¹) 2017 instead of 2018.

(²) 2016 instead of 2018.

(²) Estimate.

Source: Eurostat (online data code: gov_10a_exp)

Figure 3.2: Length of compulsory schooling, 2018
(years)



Note: Libya, not available.

(¹) The length of compulsory schooling among the 27 EU Member States ranges from 8 to 13 years.

(²) 2017.

Source: European Commission/The Education, Audiovisual and Culture Executive Agency/Eurydice
Compulsory Education in Europe – 2019/20



Enrolments

Education statistics are classified according to the International Standard Classification of Education (ISCED 2011). Based on the latest available data (see Table 3.1 for more details), there were 93.0 million pupils and students attending educational establishments from pre-primary to tertiary education across the EU-27 in 2017.

Among the ENP-South countries partial or complete data are available for seven countries (no data for Jordan or Libya). The largest number of pupils and students — 24.4 million in 2017 — was observed in Egypt, far more than the 8.7 million pupils enrolled in primary and secondary education in Algeria, which was the second highest number, followed closely by Morocco with 7.7 million pupils (excluding tertiary education).

A closer analysis of these data shows that 14.7 % of all pupils and students in the EU-27 attended pre-primary education (ISCED level 02) in 2017. The relative importance of this type of early childhood education varied considerably among

the four ENP-South countries for which a total is available (Egypt, Israel, Lebanon and Palestine), from 5.3 % of the total number of pupils and students in Egypt (2017 data) to 20.2 % in Israel (2018 data).

Over a quarter (26.3 %) of all pupils and students in the EU-27 attended a primary education establishment (ISCED level 1) in 2017. In the four ENP-South countries for which a total is available the share of pupils in primary education was consistently higher than in the EU-27, within the range of 28.6–47.4 %. For lower secondary education the situation was mixed, with Palestine recording a share (36.3 %) that was considerably above that in the EU-27 (19.6 %), Egypt a share (19.7 %) that was similar to the EU-27 average, and Israel (16.0 %) and Lebanon (15.4 %) recording shares that were below that in the EU-27. For upper secondary education the situation was reversed when compared with primary education, in that all four of these ENP-South countries reported shares that were below the EU-27 average, as was also the case for tertiary education.

Table 3.1: Number of pupils and students, 2018
(thousands)

	Total	Pre-primary education (ISCED level 02)	Primary education (ISCED level 1)	Lower secondary education (ISCED level 2)	Upper secondary education (ISCED level 3)	Post- secondary non-tertiary education (ISCED level 4)	Tertiary education (ISCED levels 5-8)
EU-27 (¹)	92 965.3	13 667.7	24 485.8	18 209.8	17 642.2	1 618.5	17 341.4
Algeria	:	:	4 513.7	2 979.7	1 222.7	:	:
Egypt (²)	24 448.4	1 302.2	11 578.4	4 819.5	3 573.7	128.7	3 045.9
Israel	2 706.2	548.0	936.2	432.6	404.1	11.7	373.5
Jordan	:	:	:	:	:	:	:
Lebanon	1 281.4	220.4	492.9	197.1	159.6	0.0	211.4
Libya	:	:	:	:	:	:	:
Morocco	:	699.3	4 322.6	1 694.5	1 014.2	4.1	:
Palestine	1 709.3	147.6	488.2	620.0	231.2	:	222.3
Tunisia (³)	:	58.2	1 201.7	509.7	462.7	:	:

(¹) 2017. Post-secondary non-tertiary education: including 2016 data for Italy.

(²) 2017.

(³) Pre-primary education: number of children registered in the preparatory year for public education.

Source: Eurostat (online data codes: educ_uoe_enrp01, educ_uoe_enrp04, educ_uoe_enrs01, educ_uoe_enrs04, educ_uoe_enrs07 and educ_uoe_enrt01)

Attainment

In 2018, the share of the population aged 20-24 that reached at least an upper secondary educational level — the youth education attainment level — was 83.1 % in the EU-27 (see Table 3.2). The female youth education attainment

level in the EU-27 was, at 85.8 %, some 5.2 points higher than the corresponding level for men.

Recent data for the ENP-South countries show that the highest rate of youth educational attainment for men was 90.6 % in Algeria (2015 data), while for women it was 93.7 % in Israel (see Figure 3.3). The rates for women in Algeria and for men in Israel

Table 3.2: Proportion of persons aged 20-24 years having attained at least an upper secondary education, 2008, 2013 and 2018

(%)

	Total			Men			Women		
	2008	2013	2018	2008	2013	2018	2008	2013	2018
EU-27 ⁽¹⁾	78.7	80.9	83.1	75.7	78.1	80.6	81.8	83.7	85.8
Algeria ⁽²⁾	77.0	87.8	90.8	79.0	87.2	90.6	74.9	88.4	91.1
Egypt ⁽³⁾	71.5	70.5	70.6	72.6	71.9	73.4	70.0	69.1	70.4
Israel ⁽⁴⁾	88.6	91.0	91.5	84.6	88.5	89.4	92.7	93.6	93.7
Jordan	:	:	:	:	:	:	:	:	:
Lebanon ⁽⁵⁾	60.5	60.4	:	55.8	53.1	:	65.7	68.0	:
Libya	:	:	:	:	:	:	:	:	:
Morocco ⁽⁶⁾	27.6	34.8	41.7	29.9	36.3	43.8	25.4	33.3	39.7
Palestine	34.6	43.6	38.4	35.6	39.1	33.1	33.6	48.3	44.0
Tunisia	:	:	:	:	:	:	:	:	:

Note: the percentage of the population aged 20-24 years having attained an upper secondary, post-secondary non-tertiary or tertiary level of education.

⁽¹⁾ 2018: break in series.

⁽²⁾ 2015 instead of 2018.

⁽³⁾ 2017 instead of 2018.

⁽⁴⁾ 2013: break in series.

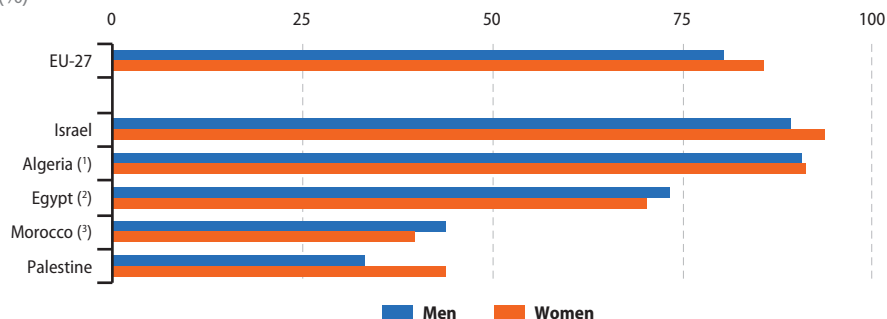
⁽⁵⁾ 2007 instead of 2008, 2012 instead of 2013.

⁽⁶⁾ 2016 instead of 2018.

Source: Eurostat (online data code: [edat_ifse_03](#))

Figure 3.3: Proportion of persons aged 20-24 years having attained at least an upper secondary education, 2018

(%)



Note: ranked on the average for all persons aged 20-24 years. Jordan, Lebanon, Libya and Tunisia: not available.

⁽¹⁾ 2015.

⁽³⁾ 2016.

⁽²⁾ 2017.

Source: Eurostat (online data code: [edat_ifse_03](#))



were also higher than the equivalent rates recorded across the EU-27. Among the remaining ENP-South countries for which data are available, the level of youth educational attainment was consistently lower than the EU-27 average both for men and for women. Palestine recorded the biggest gender gap (10.9 percentage points) in favour of young women for this level of educational attainment in 2018, while Morocco recorded the biggest gap (4.1 points; 2016 data) in favour of young men.

Policymakers are increasingly turning their focus to developing human capital. For example, the EU's strategic framework for education and training (ET 2020) set an objective whereby the share of 30–34 year olds with tertiary educational attainment should be at least 40 % by 2020. Student numbers within tertiary education (ISCED levels 5–8) have increased, as the share of 30–34 year olds in the EU-27 who had completed a tertiary education rose rapidly from 30.1 % in 2008 to 39.4 % a decade later. At 44.8 % in 2018,

Table 3.3: Proportion of persons aged 30–34 years having completed tertiary or equivalent education, 2008, 2013 and 2018 (%)

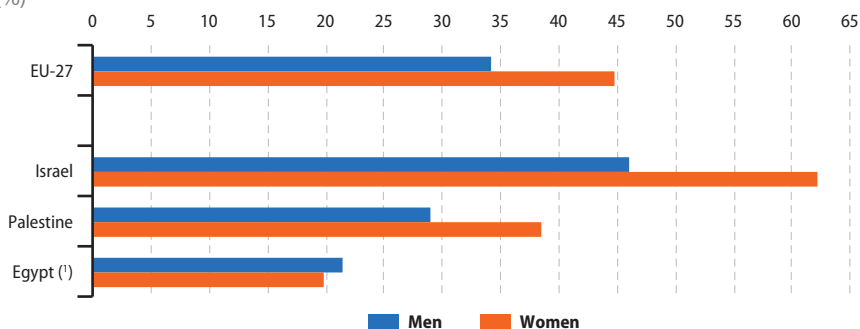
	Total			Men			Women		
	2008	2013	2018	2008	2013	2018	2008	2013	2018
EU-27 ⁽¹⁾	30.1	35.6	39.4	26.7	31.2	34.1	33.4	40.1	44.8
Algeria	:	:	:	:	:	:	:	:	:
Egypt ⁽²⁾	:	17.3	20.6	:	18.2	21.4	:	16.5	19.8
Israel	:	51.5	54.2	:	44.2	46.0	:	58.6	62.1
Jordan	:	:	:	:	:	:	:	:	:
Lebanon	:	:	:	:	:	:	:	:	:
Libya	:	:	:	:	:	:	:	:	:
Morocco	:	:	:	:	:	:	:	:	:
Palestine	17.4	25.4	33.7	18.8	22.6	29.0	16.0	28.4	38.4
Tunisia	:	:	:	:	:	:	:	:	:

(¹) 2018: break in series.

(²) 2017 instead of 2018.

Source: Eurostat (online data code: [edat_lfse_03](#))

Figure 3.4: Proportion of persons aged 30–34 years having completed tertiary or equivalent education, 2018 (%)



Note: Algeria, Jordan, Lebanon, Libya, Morocco and Tunisia, not available. Ranked on the share for both sexes.

(¹) 2017.

Source: Eurostat (online data code: [edat_lfse_03](#))

a higher share of women aged 30-34 rather than men of the same age had completed a tertiary education; the gap between the sexes was 10.7 points (see Figure 3.4).

Across the three ENP-South countries for which recent data are available (see Table 3.3), a higher proportion (54.2 %) of the population aged 30-34 in Israel had completed tertiary education than was the case in the EU-27. By contrast, in Palestine around one third (33.7 %) and in Egypt around one fifth (20.6 %; 2017 data) of the population aged 30-34 had completed tertiary education.

Science and technology graduates

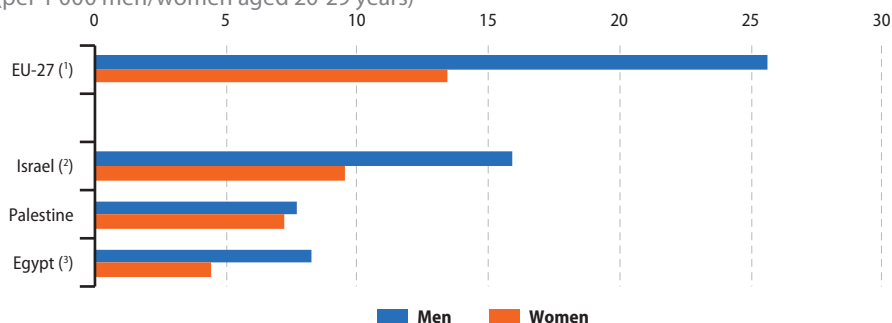
Aside from promoting tertiary education in general, policymakers in the EU have focused their attention on differences between subjects that are studied by men and women. Educational stereotyping continues to exist, with relatively few women studying engineering or physics, while programmes related to occupations such

as social work tend to be dominated by women. By targeting enrolment within science and technology programmes, policymakers hope that an increase in female participation will provide a stimulus for economic transformation and development.

Figure 3.5 shows that in 2018 there were 25.6 male graduates in the EU-27 with a science or technology degree per 1 000 male inhabitants aged 20-29, which was almost twice as high as the corresponding ratio for women (13.4 graduates in science and technology per 1 000 female inhabitants aged 20-29).

In all three ENP-South countries for which data are available, the ratios of tertiary graduates in science and technology for men and for women were both considerably lower than in the EU-27. The gender gap in Palestine was much smaller in 2018; this reflected, at least in part, the relatively high share of women who enrolled in tertiary education in Palestine. In Israel and Egypt (2016 data), the gender gap was, in relative terms, similar to that in the EU-27.

Figure 3.5: Number of tertiary graduates in science and technology relative to the size of the population aged 20-29 years, 2018
(per 1 000 men/women aged 20-29 years)



Note: Algeria, Jordan, Lebanon, Libya, Morocco and Tunisia, not available.

⁽¹⁾ 2017.

⁽²⁾ 2016.

⁽²⁾ Excluding ISCED level 5.

Source: Eurostat (online data codes: [educ_uoe_grad02](#) and [demo_pjangroup](#))

4

Labour market



Activity rates

The statistics presented in this chapter provide measures relating to the involvement of individuals and businesses in the labour market; they cover structural aspects of the labour market, both for the supply and demand side. Within the European Union (EU), information on the labour market is used to provide a key contribution to a set of employment guidelines.

The activity rate is the percentage of economically active persons in relation to the comparable total population (normally for a specific age group); the economically active population comprises employed and unemployed persons. In 2018, the activity rate for the population aged 15–64 years in Israel was, at 72.0 %, close to the EU-27 average of 73.1 %. All of the other ENP-South countries for which data are available reported considerably lower values, ranging from 51.3 % in Tunisia (2019 data) to 39.8 % in Jordan (2015 data). In fact, Israel and Tunisia were the only ENP-South countries (for which recent data are available) that had an activity rate above 50 %, indicating that at least half of the working age population was economically active.

There was a steady increase in the EU-27 activity rate among the population aged 15–64 years during the period 2008–2018. At the start of this period the activity rate stood at 70.0 % — it subsequently rose each and every year during the following decade — to reach 73.1 % by 2018 (see Table 4.1). Israel recorded an increase each year between 2008 and 2014 and stability thereafter (note that there is a break in series in 2012). Palestine recorded an increase almost every year during this period, with its rate rising overall by 5.5 percentage points. The development for Algeria was less regular but the activity rate was 0.6 points higher in 2017 than in 2008. Tunisia also recorded a higher rate at the end of the period (51.3 %; 2019 data) than at the beginning (50.8 %) but the time series between these years is rather incomplete. The three remaining countries for which data are available (no data for Libya, short time series for Lebanon) recorded lower activity rates at the end of the period studied than at the beginning, down 2.0 points in Jordan between 2008 and 2015, down 2.4 points in Egypt between 2008 and 2018, and down 3.5 points in Morocco between 2008 and 2017.

Table 4.1: Activity rates of persons aged 15–64 years, 2008–2018
(%)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	70.0	70.1	70.3	70.5	71.0	71.3	71.6	71.9	72.3	72.7	73.1
Algeria	44.6	44.4	44.7	42.7	45.2	46.5	43.9	45.0	45.3	45.2	:
Egypt	47.6	48.1	49.5	48.8	48.4	48.5	48.0	46.6	46.6	46.8	45.2
Israel⁽¹⁾	63.8	64.1	64.5	64.6	71.5	71.6	72.2	72.2	72.1	72.1	72.0
Jordan	41.8	42.4	41.8	41.4	40.4	39.7	39.0	39.8	:	:	:
Lebanon	:	50.9	:	:	54.5	:	:	:	:	:	:
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	53.2	52.4	52.2	52.0	51.2	51.1	50.9	50.2	49.3	49.7	:
Palestine	43.1	43.6	43.1	45.0	45.6	45.6	47.8	47.8	47.8	47.9	48.6
Tunisia⁽²⁾	50.8	50.2	:	:	:	:	:	52.5	:	:	51.3

(¹) 2012: break in series.

(²) 2019 instead of 2018.

Source: Eurostat (online data code: [lfsa_argan](#))



Activity (in economic terms) is higher among men than women in almost all developed world economies. This may be linked to a wide range of different socio-economic factors, including: the traditional role of women as homemakers with family responsibilities; labour market inequalities such as the gender pay gap or a lack of equal opportunities in the workplace; the absence of flexible working structures; availability of affordable childcare; the impact of taxation policy or social security payments/family benefits that encourage some women to remain at home (rather than to seek a job). The participation of women in the labour force in the ENP-South countries is generally low, although some countries have a range of initiatives designed to promote, empower and mobilise women's participation. It should also be noted that many women work within the family unit in these countries and there may be difficulties in measuring their labour input for official statistics, for example, when working in a family business or helping with agricultural activities.

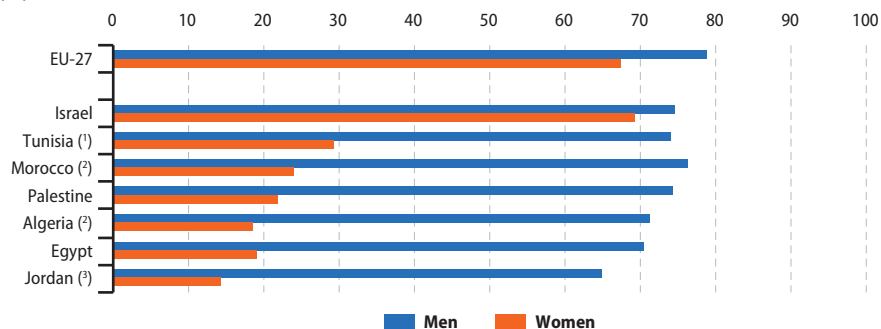
In 2018, the EU-27 activity rate for women was 67.5 % (see Figure 4.1). Apart from Israel, where the rate was 69.2 %, the activity rate in the ENP-South countries for women was consistently

much lower than in the EU-27. Fewer than 3 in 10 of all women of working age were active in the labour force in the remaining ENP-South countries as activity rates for women aged 15-64 years ranged from 29.5 % in Tunisia (2019 data) to 14.5 % in Jordan (2015 data).

These differences were in stark contrast to the rates recorded for men. The EU-27 activity rate for men stood at 78.7 % in 2018. The latest rates among the ENP-South countries were — with the exception of Jordan where the rate was 65.0 % (2015 data) — within 10 percentage points of the EU average. Among the ENP-South countries, the highest activity rate for men was recorded in Morocco, 76.4 % (2017 data), with rates of 74.0 % or higher also recorded in Israel, Palestine and Tunisia (2019 data).

As for the EU-27 (where the gender gap in activity rates was 11.2 points), activity rates for men were systematically higher than those recorded for women in each of the ENP-South countries. The gap between the sexes ranged from 52.9 points in Algeria (2017 data) to 44.6 points in Tunisia (2019 data), with Israel's gender gap of 5.5 points far below this range and considerably narrower than the gap observed in the EU-27.

Figure 4.1: Activity rates of persons aged 15-64 years, 2018
(%)



Note: ranked on the total rate (for men and women combined). Lebanon and Libya: not available.

⁽¹⁾ 2019.

⁽³⁾ 2015.

⁽²⁾ 2017.

Source: Eurostat (online data code: [lfsi_emp_a](#))

Employment

The employment rate is the percentage of employed persons in relation to the comparable total population (normally for a specific age group); the analyses of employment rates presented in Table 4.2 and Figure 4.2 are based on information for the working-age population, defined here as the population aged 15-64 years.

In 2018, the EU-27 employment rate for the population aged 15-64 years stood at 67.7 % (see Table 4.2). While some 2.9 points higher than a decade before in 2008, this overall change disguises a fluctuating development during the most recent 10-year period for which data are available. Indeed, having risen in 2008 to reach 64.8 %, the EU-27 employment rate subsequently fell in consecutive years, to reach a relative low of 63.3 % in 2010. There was almost no change in the EU-27 employment rate between 2010 and 2013, after which the rate started to rise again. By 2015, the rate had nearly returned to the same level that had been recorded in 2008 and this was followed by further increases to reach 67.7 % by 2018.

In 2018, the employment rate among the ENP-South countries peaked at 69.0 % in Israel. Elsewhere this rate ranged from 44.5 % in Morocco (2017 data) to 33.5 % in Palestine. As such, Israel was the only ENP-South country with a higher employment rate than that observed for the EU-27 and also the only one where more than half of working-age people were in employment.

An analysis of developments during the latest 10-year period can be made for five of the ENP-South countries based on the data available in Table 4.2. The employment rate in Israel was 2.5 percentage points higher in 2018 than in 2012 (start of the time series). Palestine also recorded a similar increase as its rate was 2.0 points higher in 2018 than in 2008, although higher rates had been recorded in some of the intervening years, notably 2011 and 2015. A comparable situation was observed for Algeria, with the 2017 rate 0.4 points higher than the 2008 rate, but with a peak recorded in 2013. In the two remaining countries — Egypt and Morocco — the latest rates were the lowest across the time series available: in Egypt, the employment rate was 4.3 points lower in 2018 than in 2010 while in Morocco it was 3.4 points lower in 2017 than in 2008.

Table 4.2: Employment rates of persons aged 15-64 years, 2008-2018

(%)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	64.8	63.6	63.3	63.4	63.2	63.1	63.8	64.6	65.6	66.8	67.7
Algeria	39.5	39.8	40.2	38.4	40.2	41.9	39.2	39.9	40.5	39.9	:
Egypt	:	:	45.0	43.0	42.4	42.1	41.8	40.8	40.8	41.2	40.7
Israel	:	:	:	:	66.5	67.1	67.9	68.3	68.6	69.0	69.0
Jordan	:	:	:	:	:	:	:	:	:	:	:
Lebanon	:	:	:	:	:	:	:	:	:	:	:
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	47.9	47.5	47.4	47.3	46.5	46.2	45.7	45.2	44.5	44.5	:
Palestine	31.5	32.7	32.8	35.5	35.0	34.9	34.8	35.3	34.8	34.2	33.5
Tunisia (¹)	:	:	:	:	:	:	:	:	:	:	43.4

(¹) 2019 instead of 2018.

Source: Eurostat (online data code: [lfsi_emp_a](#))



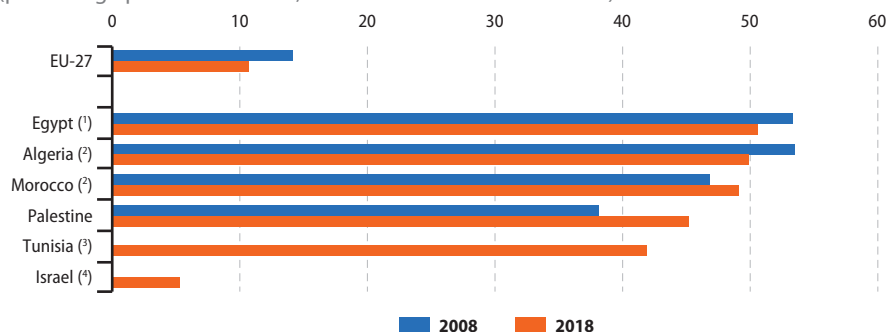
In recent years, policymakers across the EU have sought measures designed to increase the share of their working-age populations who are in employment; three specific areas have been targeted, namely, to increase employment rates for women, early leavers from education and training and older persons. This section looks at the first of these aspects, namely, the difference in employment rates between the sexes.

The employment rate for men (73.1 %) in the EU-27 remained considerably higher than the corresponding rate for women (62.4 %) in 2018, despite the gap having fallen from 14.1 points in 2008 to 10.7 points by 2018 (see Figure 4.2).

With the exception of Israel (where the gap between the sexes was narrower than in the EU-27), employment rates for women ranged from 42 to 51 points lower than those for men in the remaining ENP-South countries for which data are available: Tunisia (2019 data), Palestine, Morocco (2017 data), Algeria (2017 data) and Egypt.

Comparing gender gaps for the employment rate between the years shown in Figure 4.2, it can be seen that two of the ENP-South countries — Egypt (2010 to 2018) and Algeria (2008 to 2017) — followed the pattern observed in the EU-27, namely, that differences in employment rates between the sexes narrowed. By contrast, in Morocco (2008 to 2017) and in Palestine (2008 to 2018) the gender gap for employment rates increased.

Figure 4.2: Gender gap for employment rates of persons aged 15-64 years, 2008 and 2018
(percentage points difference, rate for men – rate for women)



Note: Jordan, Lebanon and Libya, not available.

(1) 2010 instead of 2008.

(2) 2017 instead of 2018.

(3) 2008: not available. 2019 instead of 2018.

(4) 2008: not available.

Source: Eurostat (online data code: [lfsi_emp_a](#))

Within the EU-27, the services sector dominated the labour market and accounted for 70.6 % of those employed (aged 15 years and over) in 2018; its share of the total number of persons employed rose by 4.5 percentage points between 2008 and 2018 (see Table 4.3). In Israel, 81.8 % of the workforce was employed in services, with the next highest share among the ENP-South countries being considerably lower, 62.4 % in Palestine (see Figure 4.3). Among the six ENP-South countries for which data are available, the lowest share of services in the workforce was recorded in Morocco, at just over two fifths (42.2 %; 2017 data).

Five of the six ENP-South countries for which recent data are available reported shares for industry in their total workforces that were

below the EU-27 average (18.2 %; 2018 data). The 11.7 % share in Morocco (2017 data) was the lowest of these, while the 18.3 % share in Tunisia (2019 data) was the only one above the EU-27 average.

Consequently, the employment shares of construction as well as agriculture, forestry and fishing in the ENP-South countries were generally higher than in the EU-27; the one exception was Israel which recorded smaller shares for both of these activities in 2018. More than one third (35.1 %; 2017 data) of the workforce in Morocco and one fifth of the workforce in Egypt (21.6 %) were employed in agriculture, forestry and fishing. The highest shares of the workforce in construction were recorded for Palestine (17.7 %) and Algeria (17.0 %; 2017 data) and construction

Table 4.3: Structure of employment of persons aged 15 years and over, 2008 and 2018 (%)

	Agriculture, forestry and fishing		Industry		Construction		Services	
	2008	2018	2008	2018	2008	2018	2008	2018
EU-27	5.8	4.5	19.9	18.2	8.3	6.7	66.1	70.6
Algeria ⁽¹⁾	13.7	10.1	12.5	13.8	17.2	17.0	56.6	59.1
Egypt ⁽²⁾	28.2	21.6	13.9	14.3	11.3	12.5	46.6	51.4
Israel	:	1.0	:	12.0	:	5.2	:	81.8
Jordan	:	:	:	:	:	:	:	:
Lebanon	:	:	:	:	:	:	:	:
Libya	:	:	:	:	:	:	:	:
Morocco ⁽¹⁾	40.9	35.1	12.8	11.7	8.9	10.8	37.2	42.2
Palestine	13.4	6.3	12.7	13.6	10.4	17.7	63.5	62.4
Tunisia ⁽³⁾	:	14.1	:	18.3	:	14.5	:	53.1

⁽¹⁾ 2017 instead of 2018.

⁽²⁾ 2010 instead of 2008.

⁽³⁾ 2019 instead of 2018.

Source: Eurostat (online data code: [lfsa_egan2](#))

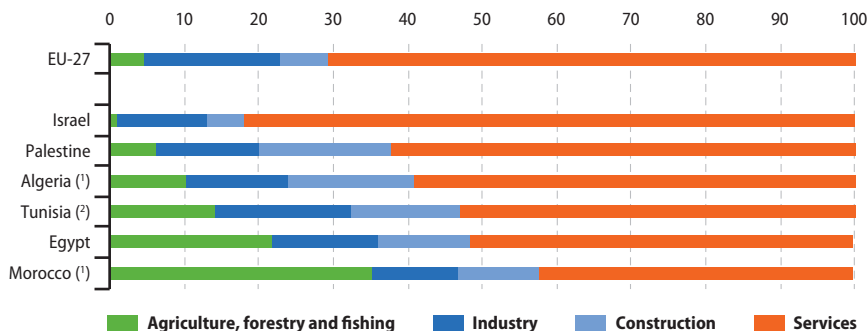


also employed more than one tenth of the workforce in Tunisia (2019 data), Egypt and Morocco (2017 data).

The share of the workforce in agriculture, forestry and fishing fell between 2008 and 2018 in the EU-27 as it did between the years shown in Table 4.3 for all four of the ENP-South countries with a long time series available: Algeria, Egypt, Morocco and Palestine. The share of the labour force employed in services expanded in three of these four countries, as the only decline was recorded for Palestine between 2008 and 2018. The share of the workforce employed in industry and construction also increased in three of the ENP-South countries, with Morocco (2008-2017) the only exception for industry and Algeria (2008-2017) the only exception for construction.

A self-employed person is the sole or joint owner of the unincorporated enterprise in which he/she works, unless they are also in paid employment which is their main activity (in that case, they are considered to be an employee). The self-employed category also includes: unpaid family workers; outworkers (who work outside the usual workplace, such as at home); workers engaged in production done entirely for their own final use or own capital formation, either individually or collectively. An employee is an individual who works for a public or private employer and who in return receives compensation in the form of wages, salaries, fees, gratuities, payment by results or payment in kind; professional military staff are also included.

Figure 4.3: Structure of employment of persons aged 15 years and over, 2018
(%)



Note: ranked on the share of services. Jordan, Lebanon and Libya, not available.

⁽¹⁾ 2017 instead of 2018.

⁽²⁾ 2019 instead of 2018.

Source: Eurostat (online data code: [lfsa_egan2](#))

In 2018, self-employed and family workers occupied more than one out of every seven jobs (15.3 %) in the EU-27; employees accounted for the remainder (84.7 %) of the workforce (see Table 4.4). Within the EU-27, the relative share of self-employed and family workers in total employment fell by 1.8 points between 2008 and 2018.

The structure of employment by working status was quite different in most of the ENP-South countries. The relative importance of self-employed and family workers reached a high of 48.7 % of the total workforce in Morocco (2017 data). This share was just under one third in Algeria (31.7 %; 2017 data), Egypt (31.3 %) and

Palestine (30.3 %) and was also above the EU-27 average in Tunisia (26.6 %; 2019 data). As such, the only ENP-South country for which data are available with a lower share of self-employed and family workers was Israel (11.9 %).

Comparing the development of employment structures by working status between the years shown in Table 4.4, all four ENP-South countries with data available reported a fall in the share of the self-employed and family workers in total employment. The largest fall was recorded in Egypt (down 6.5 percentage points between 2010 and 2018) and the smallest in Algeria (down 2.5 points between 2008 and 2017).

Table 4.4: Working status of persons aged 15 years and over in employment, 2008 and 2018
(%)

	Self-employed and family workers		Employees	
	2008	2018	2008	2018
EU-27	17.1	15.3	82.9	84.7
Algeria ⁽¹⁾	34.2	31.7	65.4	68.3
Egypt ⁽²⁾	37.8	31.3	62.2	68.7
Israel	:	11.9	:	87.6
Jordan	:	:	:	:
Lebanon	:	:	:	:
Libya	:	:	:	:
Morocco ⁽¹⁾	53.7	48.7	43.8	49.0
Palestine	35.4	30.3	64.6	69.7
Tunisia ⁽³⁾	:	26.6	:	73.4

⁽¹⁾ 2017 instead of 2018.

⁽²⁾ 2010 instead of 2008.

⁽³⁾ 2019 instead of 2018.

Source: Eurostat (online data code: [lfsa_egaps](#))



Unemployment rates

According to the International Labour Organisation (ILO), an unemployed person is defined as someone who is: aged 15-74 years; without work during the reference week; available to start work within the next two weeks (or has already found a job to start within the next three months); actively having sought employment at some time during the last four weeks.

The unemployment rate is the number of people (aged 15-74 years) who are unemployed, expressed as a percentage of the total labour force (aged 15-74 years). When there is an economic downturn, it usually takes several months before the unemployment rate begins to rise. Once the economy starts to pick up again, employers usually remain cautious about hiring new workers and there may again be a lag of several months before unemployment rates start to fall.

While the global financial and economic crisis which started in 2008 often led to large contractions in economic activity across the EU in 2008 and 2009, it was not uncommon for unemployment rates to increase not just in 2009 but also in 2010 (and for some EU Member States even for a couple more years). In fact, the

EU-27 unemployment rate rose between 2008 and 2010, was almost unchanged between 2010 (9.8 %) and 2011 (9.9 %), increased again to 11.4 % in 2013, before dropping back each and every year thereafter to reach 7.3 % by 2018 (see Table 4.5).

Among the five ENP-South countries for which a time series of unemployment data is available, Egypt reported a broadly similar development, with its unemployment rate rising from 8.7 % in 2008 to 13.2 % by 2013, before dropping back to 10.0 % in 2018. In Palestine, the unemployment rate fell between 2008 and 2011 before increasing through to 2014, dipping in 2015 and then increasing again to reach 30.8 % in 2018: throughout this whole period the unemployment rate in Palestine remained high, always in excess of 20 %. In Morocco, the unemployment rate fell at a modest pace, down from 9.6 % in 2008 to 9.0 % in 2011, before increasing to 10.0 % by 2014, falling back in 2015 and 2016 and then increasing again in 2017. In Algeria, the unemployment rate was relatively stable, ranging between 9.8 % and 11.7 % every year from 2008 to 2017. The time series for Israel is shorter but shows a clear downward pattern from a rate of 6.9 % in 2012 to 4.0 % in 2018.

Table 4.5: Unemployment rates of persons aged 15-74 years, 2008-2018
(%)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	7.2	9.1	9.8	9.9	10.8	11.4	10.9	10.1	9.1	8.2	7.3
Algeria	11.7	10.2	10.0	10.0	11.0	9.8	10.6	11.2	10.5	11.7	:
Egypt	8.7	9.4	9.0	12.0	12.7	13.2	13.0	12.8	12.5	11.8	10.0
Israel	:	:	:	:	6.9	6.2	5.9	5.3	4.8	4.2	4.0
Jordan	:	:	:	:	:	:	:	:	:	:	:
Lebanon	:	:	:	:	:	:	:	:	:	:	:
Libya	:	:	13.5	:	19.0	17.4	:	:	:	:	:
Morocco	9.6	9.2	9.1	9.0	9.1	9.3	10.0	9.8	9.5	10.3	:
Palestine	26.7	24.7	23.8	20.9	22.9	23.4	27.1	26.1	27.1	28.4	30.8
Tunisia (*)	:	:	:	:	:	:	:	:	:	:	15.3

(*) 2019 instead of 2018.

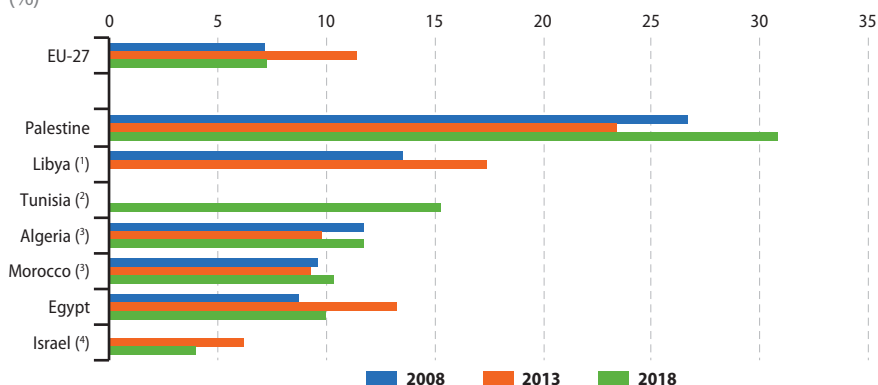
Source: Eurostat (online data code: ifsa_urgan)

Based on the latest information available, only Israel — among the ENP-South countries — recorded a lower unemployment rate than the EU-27 (see Figure 4.4).

In 2018, the EU-27 male unemployment rate (men aged 15-74 years) was 0.6 points lower than the corresponding rate for women (see Figure 4.5). Israel was the only ENP-South country to record a different pattern, namely a higher unemployment rate for men than for women, although the

difference was minimal (0.1 percentage points). In the five remaining ENP-South countries for which data are available, unemployment rates for men were lower than those for women. This gender gap was particularly pronounced in Palestine, as the unemployment rate for men (25.1 %) was 26.1 points lower than for women (51.2 %) in 2018, while the next largest gaps between the sexes were recorded in Egypt (14.7 points), Algeria (11.3 points; 2017 data) and Tunisia (10.0 points; 2019 data).

Figure 4.4: Unemployment rates of persons aged 15-74 years, 2008, 2013 and 2018 (%)



Note: Jordan and Lebanon, not available.

⁽¹⁾ 2010 instead of 2008. 2018: not available.

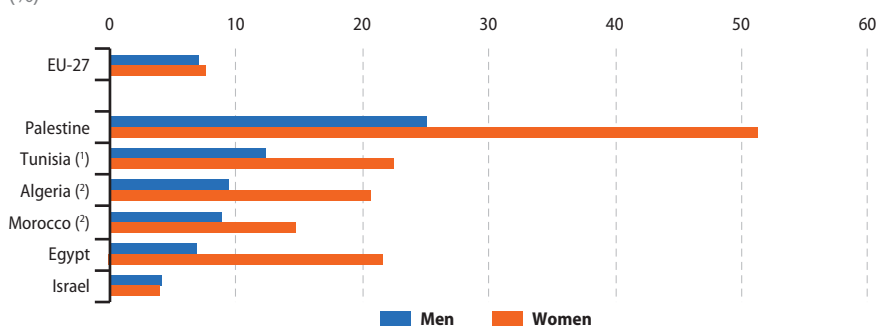
⁽²⁾ 2008 and 2013: not available. 2019 instead of 2018.

⁽³⁾ 2017 instead of 2018.

⁽⁴⁾ 2008: not available.

Source: Eurostat (online data code: [lfsa_urgan](#))

Figure 4.5: Unemployment rates of persons aged 15-74 years analysed by sex, 2018 (%)



Note: ranked on the total unemployment rate (both sexes). Jordan, Lebanon and Libya, not available.

⁽¹⁾ 2019.

⁽²⁾ 2017.

Source: Eurostat (online data code: [lfsa_urgan](#))



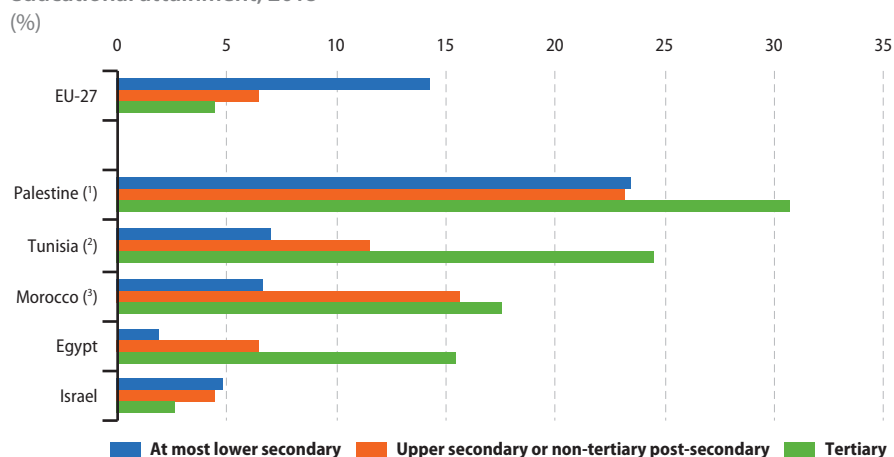
Male (see the previous page), youth (especially early leavers from education and training) and long-term unemployment appear to be more susceptible to cyclical economic changes than overall unemployment. Indeed, in the period following the global financial and economic crisis it was commonplace to find that male, youth and long-term unemployment rates were particularly high in many of the EU Member States. As a result, social policymakers often face the challenge of remedying these situations by designing ways to increase employment opportunities for various subgroups of society, those working in particular economic activities, or those living in specific regions.

Figure 4.6 provides information on unemployment rates by level of educational attainment; the statistics on educational attainment are classified according to the International Standard Classification of Education (ISCED 2011). The figure provides evidence concerning the impact that education and training may have on the chances of finding

work. In 2018, the highest unemployment rate in the EU-27 (for people aged 15-74 years) was recorded among people with at most a lower secondary education (up to ISCED level 2), at 14.3 %. The unemployment rate for people with an upper secondary or non-tertiary post-secondary education (ISCED levels 3 or 4) was less than half that recorded for people with at most a lower secondary education, standing at 6.5 %, while the lowest unemployment rate was recorded for people with a tertiary education (ISCED levels 5-8), at 4.5 %. In other words, an investment in education and training appears to reduce considerably the risk of unemployment in the EU-27. A similar pattern was observed in Israel, where the unemployment rate in 2018 among those with a tertiary level of education was 2.7 %, considerably lower than the rate recorded for those with at most a lower secondary level of education (4.9 %).

By contrast, unemployment rates for those with a tertiary level of education reached a level of at least one tenth of the labour force

Figure 4.6: Unemployment rates of persons aged 15-74 years analysed by level of educational attainment, 2018



Note: ranked on total unemployment. Algeria, Jordan, Lebanon and Libya, not available.

⁽¹⁾ Upper secondary education and post-secondary non-tertiary education excludes post-secondary non-tertiary education.

⁽²⁾ 2019 instead of 2018.

⁽³⁾ 2017 instead of 2018.

Source: Eurostat (online data code: ifsa_urgaed)

in the remaining four ENP-South countries for which data are available. In Egypt, Morocco (2017 data), Tunisia (2019 data) and Palestine, the highest unemployment rates analysed by educational attainment were recorded for those with a tertiary level of education. These differences may, at least in part, be explained by the difficulties faced by educated women in finding work in some of these countries, but may also be compounded by a higher proportion of jobs being concentrated in areas of the economy that are characterised as having relatively low productivity or a low level of skills. The highest unemployment rate among people with a tertiary level of education was recorded in Palestine (30.7 %).

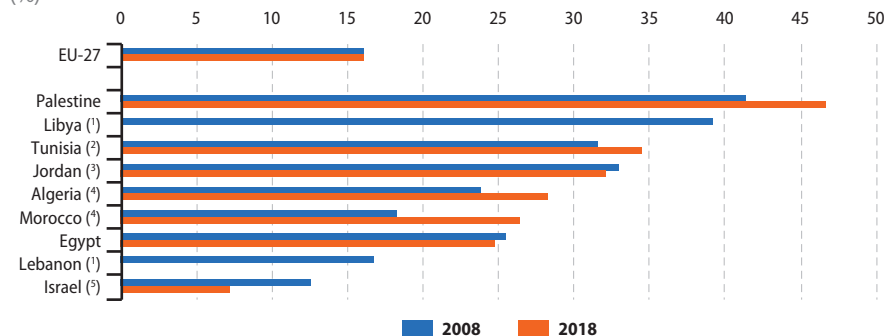
In 2018, the EU-27 unemployment rate for people with at most a lower secondary education (14.3 %) was higher than in most of the ENP-South countries (subject to data availability), the exception being Palestine. By contrast, unemployment rates in the EU-27 were generally lower than in the ENP-South countries for people with an upper secondary or non-tertiary post-secondary education, as Israel was the only exception. Equally, the unemployment

rate for people with a tertiary education was lower in Israel than in the EU-27, whereas elsewhere among the ENP-South countries this rate was also higher.

The youth unemployment rate is defined as the percentage of unemployed people within the age group 15-24 years compared with the total labour force of the same age. It is important to note that a relatively large share of this subpopulation may be outside the labour market (since many youths study full-time and are therefore not available for work).

In 2018, almost one sixth (16.1 %) of the EU-27 labour force aged 15-24 was without work. The youth unemployment rate was more than double the overall unemployment rate (7.3 %) for the whole of the labour force (aged 15-74). In 2018, the highest youth unemployment rates in the ENP-South countries were recorded in Palestine (46.7 %), Tunisia (34.4 %; 2019 data) and Jordan (32.1 %; 2015 data). Most of the other ENP-South countries for which data are available (see Figure 4.7) also had youth unemployment rates considerably above the EU-27 average. By contrast, the youth unemployment rate in Israel (7.2 %) was less than half the rate in the EU-27.

Figure 4.7: Youth unemployment rates (persons aged 15-24 years), 2008 and 2018 (%)



⁽¹⁾ 2009 instead of 2008. 2018: not available.

⁽²⁾ 2019 instead of 2018.

⁽³⁾ 2015 instead of 2018.

⁽⁴⁾ 2017 instead of 2018. Persons aged 16-24 years.

⁽⁵⁾ Break in series.

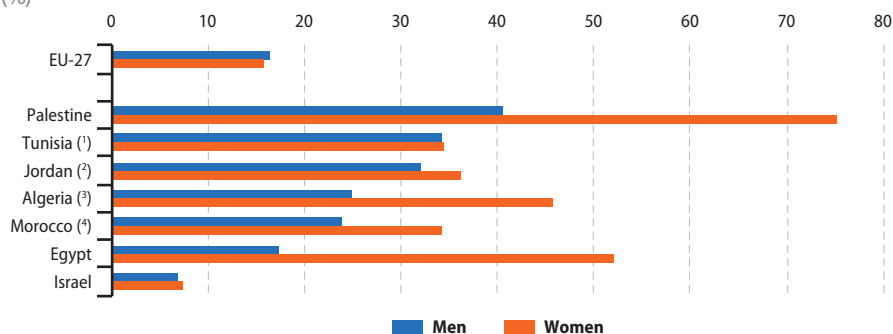
Source: Eurostat (online data code: ifsa_urgan)



As for the EU-27, youth unemployment rates were consistently higher than overall unemployment rates in each of the ENP-South countries. In 2018, the relative difference between these two rates was least marked in Palestine, as the youth unemployment rate of 46.7 % was 1.5 times as high as the overall rate for the whole labour force (30.8 %). Youth unemployment rates in the remaining ENP-South countries were between 1.8 (Israel) and 2.6 (Morocco; 2017 data) times as high as overall unemployment rates; the same ratio for the EU-27 was 2.2.

In 2018, EU-27 youth unemployment rates were higher for young men (16.5 %) than they were for young women (15.7 %). By contrast, a gender gap with higher rates for women was observed in all of the ENP-South countries for which data are available (see Figure 4.8). The largest gaps in percentage point terms were in Palestine and Egypt (both with a gap of 34.8 percentage points) while in relative terms the gap in Egypt was largest, as the unemployment rate for young women was 3.0 times as high as the rate for young men. Tunisia (2019 data) and Israel had the narrowest gender gaps for youth unemployment rates, with the rates for young women only slightly higher than those for young men.

Figure 4.8: Youth unemployment rates (persons aged 15-24 years) analysed by sex, 2018 (%)



Note: ranked on the total youth unemployment rate (both sexes). Lebanon and Libya, not available.

⁽¹⁾ 2019.

⁽³⁾ 2017.

⁽²⁾ 2015.

⁽⁴⁾ 2017. Persons aged 16-24 years.

Source: Eurostat (online data code: ifsa_organ)

Long-term unemployment refers to people (as presented in Table 4.6 for persons aged 15-74 years) who are out of work and have been actively seeking employment for at least a year. These rates are often cited as a key concern for policymakers, affecting social cohesion and, ultimately, economic growth. By 2018, the long-term unemployment rate of the EU-27 had dropped back to 3.1 % for men and 3.4 % for women. Israel was the only ENP-South country — among the five for which recent (2017, 2018 or 2019) comparable data are available — that did not have higher long-term unemployment rates than the EU-27.

In the EU-27, long-term unemployment rates for men and for women were slightly higher in 2018 than they had been in 2008 although they had been considerably higher in many of the intervening years. In Israel, long-term unemployment rates for 2018 were clearly lower than those for 2013, whereas in Egypt the rates had clearly increased between 2010 and 2013 and again between 2013 and 2018. In Algeria and Palestine, the situation was mixed, with lower rates for men in 2017 (Algeria) or 2018 (Palestine) than in 2008 while all of the rates for women across ENP-South countries increased during the same period.

Table 4.6: Long-term unemployment rates of persons aged 15-74 years, 2008, 2013 and 2018

(%)

	Men			Women		
	2008	2013	2018	2008	2013	2018
EU-27	2.5	5.4	3.1	3.1	5.5	3.4
Algeria ⁽¹⁾	6.6	5.2	5.5	11.3	9.2	12.9
Egypt ⁽²⁾	1.2	2.1	3.8	4.3	4.5	14.7
Israel	:	0.7	0.2	:	0.6	0.2
Jordan	:	:	:	:	:	:
Lebanon	:	:	:	:	:	:
Libya	:	:	:	:	:	:
Morocco	:	:	:	:	:	:
Palestine	14.3	7.0	9.0	13.5	18.9	33.2
Tunisia ⁽³⁾	:	:	4.2	:	:	8.9

⁽¹⁾ 2017 instead of 2018.

⁽²⁾ 2010 instead of 2008.

⁽³⁾ 2019 instead of 2018.

Source: Eurostat (online data code: [une_ltu_a](#))

5

Economy and finance



Gross domestic product

National accounts are the source for a multitude of well-known economic indicators, among which gross domestic product (GDP) is one of the most often cited. It is a central measure within national accounts providing information on the overall size of an economy, while derived indicators such as GDP per inhabitant are widely used to compare living standards, or to monitor economic convergence/divergence.

An analysis of GDP provides information on the overall level of economic output: Table 5.1 shows that the GDP of the EU-27 was EUR 13 484 billion in 2018. The largest economy among the

ENP-South countries was Israel with GDP valued at EUR 313 billion in 2018, while the economy of Egypt was a little more than half this size (EUR 173 billion; 2017 data), followed by Algeria (EUR 147 billion) and Morocco (EUR 100 billion). The other ENP-South economies for which recent data are available were notably smaller: Lebanon's economy (EUR 47.3 billion; 2017 data) was less than half the size of that of Morocco, while Jordan's (EUR 35.4 billion; 2016 data) and Palestine's (EUR 12.4 billion) were the smallest. Older data for Tunisia (EUR 38.9 billion; 2015 data) show economic output between those of Jordan and Lebanon while Libya's GDP (EUR 65.0 billion; 2012 data) was closer to that of Morocco.

Table 5.1: Gross domestic product (GDP), 2008-2018
(billion EUR)

	2008	2010	2012	2014	2016	2018
EU-27	11 085.4	10 978.3	11 390.0	11 781.7	12 550.3	13 483.9
Algeria ⁽¹⁾	116.4	120.9	158.7	161.2	144.5	146.5
Egypt ⁽¹⁾⁽²⁾	112.1	161.9	215.2	226.5	244.2	172.7
Israel	147.5	176.6	200.1	233.3	288.3	313.4
Jordan	20.0	23.9	27.9	32.5	35.4	:
Lebanon ⁽²⁾	19.9	29.0	34.3	36.3	46.3	47.3
Libya ⁽¹⁾	49.8	51.7	65.0	:	:	:
Morocco	63.2	70.4	76.4	83.0	93.4	99.8
Palestine	4.5	6.7	8.8	9.6	12.1	12.4
Tunisia ⁽¹⁾⁽³⁾	30.5	33.2	35.1	35.8	38.9	:

⁽¹⁾ Based on the 1993 system of national accounts.

⁽²⁾ 2017 instead of 2018.

⁽³⁾ 2015 instead of 2016.

Source: Eurostat (online data code: [nama_10_gdp](#))

Table 5.2 and Figure 5.1 present information on GDP developments during the period 2008-2018; they are based on annual changes compared with the previous year in real terms, in other words, monetary values that are adjusted (deflated) for changes in prices. The calculation of the annual rate of change of GDP using chain linked volume indices (real changes) is intended to allow comparisons of the dynamics of economic development over time.

The global financial and economic crisis which started in 2008 had a considerable impact on economic developments. In the EU-27, the largest contraction in activity was recorded in 2009, as the real rate of GDP change was -4.3% (when compared with the year before). After a modest recovery in 2010 and 2011, there was a subsequent reduction (-0.7%) of economic activity in the EU-27 in 2012, followed by almost no change (down 0.1%) in the level of output in 2013 and increases in the range of $1.6-2.7\%$ through until 2018.

By contrast, although there was a partial slowdown in 2009, real GDP growth was maintained throughout the financial and

economic crisis in all of the ENP-South countries for which data are presented in Table 5.2 and Figure 5.1, other than Libya. Although most of the ENP-South countries recorded a slowdown in real GDP growth in 2009, Lebanon and Palestine were exceptions as their rate of economic growth accelerated.

In more recent years, real changes in GDP in the ENP-South countries remained positive with only a few exceptions: a fall in 2011 in Tunisia, a small reduction in 2014 in Palestine and a major economic interruption in Libya in 2011 with the onset of the civil war. Apart from these rare contractions in output, growth exceeded 2.0% in most years in most of the ENP-South countries, with slower growth in 2011 in Egypt, in 2015 in Tunisia, in 2016 in Morocco, in 2017 and 2018 in Algeria, and 2018 in Palestine, as well as in several of the most recent years for which data are available in Lebanon. The latest annual rates of change (generally 2016, 2017 or 2018) show real GDP growth ranging from 4.2% in Egypt (2017 data) down to 1.4% in Algeria (2018 data), 0.8% in Palestine (also 2018 data) and 0.6% in Lebanon (2017 data).

Table 5.2: Real GDP growth — annual change in GDP, 2008-2018 (%)

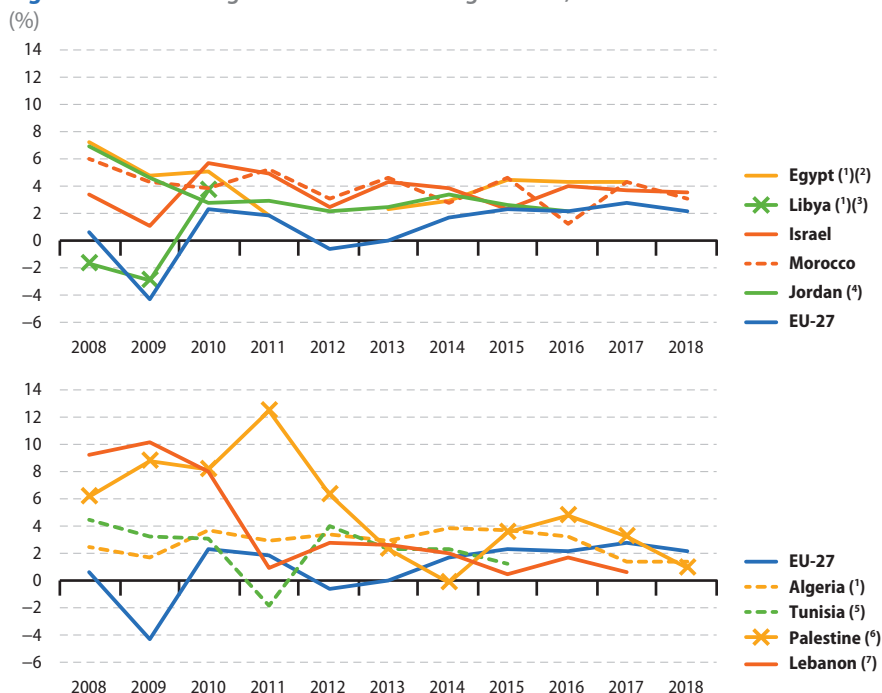
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	0.6	-4.3	2.2	1.8	-0.7	-0.1	1.6	2.3	2.1	2.7	2.1
Algeria ⁽¹⁾	2.4	1.6	3.6	2.9	3.4	2.8	3.8	3.7	3.2	1.3	1.4
Egypt ⁽¹⁾	7.2	4.7	5.1	1.8	:	2.2	2.9	4.4	4.3	4.2	:
Israel	3.3	1.0	5.6	4.9	2.4	4.3	3.8	2.3	4.0	3.6	3.4
Jordan	6.8	4.5	2.7	2.8	2.1	2.4	3.4	2.6	2.1	:	:
Lebanon	9.2	10.1	8.0	0.9	2.7	2.6	1.9	0.4	1.6	0.6	:
Libya ⁽¹⁾	-1.7	-2.9	3.7	-67.3	134.3	:	:	:	:	:	:
Morocco	5.9	4.2	3.8	5.2	3.0	4.5	2.7	4.5	1.1	4.2	3.0
Palestine ⁽²⁾	6.1	8.7	8.1	12.4	6.3	2.2	-0.2	3.4	4.7	3.1	0.8
Tunisia ⁽¹⁾	4.5	3.1	3.0	-1.9	3.9	2.3	2.3	1.1	:	:	:

⁽¹⁾ Based on the 1993 system of national accounts.

⁽²⁾ Calculated from a time series expressed in US dollars.

⁽¹⁾ 2008-2014: based on the 1993 system of national accounts.

Source: Eurostat (online data code: [nama_10_gdp](#))

Figure 5.1: Real GDP growth — annual change in GDP, 2008-2018

⁽¹⁾ Based on the 1993 system of national accounts.

⁽²⁾ 2012 and 2018: not available.

⁽³⁾ 2011 (-67.3 %) and 2012 (134.3 %) not shown for reasons of readability. 2013-2018: not available.

⁽⁴⁾ 2017 and 2018: not available.

⁽⁵⁾ 2008-2014: based on the 1993 system of national accounts. 2016-2018: not available.

⁽⁶⁾ Calculated from a time series expressed in US dollars.

⁽⁷⁾ 2018: not available.

Source: Eurostat (online data code: [nama_10_gdp](#))

GDP per inhabitant is often used as a measure for overall living standards and the competitiveness of an economy. The figures presented in Table 5.3 are based on current price euro series and as such do not reflect any difference in price levels between countries. Note that many goods and services cost less in the ENP-South countries than they do, on average, in the EU. Price differences across borders mean that different amounts of money are needed to purchase the same goods and services depending on the country under investigation.

Based on the latest available data for each of the ENP-South countries, Israel was the only one to record a level of GDP per inhabitant that was above that recorded in the EU-27, surpassing the EU average in 2013: the gap between Israel and the EU-27 for this indicator increased each year through to 2017 and then contracted slightly in 2018, by which time Israel's GDP per inhabitant was EUR 35.3 thousand compared with EUR 30.2 thousand in the EU-27. The remaining ENP-South countries generally recorded much lower levels of GDP per inhabitant and most were within the range of EUR 1.8 thousand to EUR 3.6 thousand per inhabitant with Egypt at the lower end of this

range and Jordan at the top (based on the latest data available for each country). Libya was an exception, although the most recent data are from 2012. As such, GDP per inhabitant in the majority of the ENP-South countries was less than one eighth of the level recorded across the EU-27.

While the rate of GDP growth across most of the ENP-South countries was relatively rapid during the period shown in Table 5.3 and Figure 5.2, this was often accompanied by relatively large population increases too. Nevertheless, GDP per inhabitant rose for each of the ENP-South

countries (for which time series are available). The most notable gain was in Palestine, as GDP per inhabitant more than doubled (although this was from the lowest level among ENP-South countries in 2008). In Israel, GDP per capita increased by 76 %, while growth of 40 % (2008-2016) was recorded for Morocco, 23 % for Egypt (2008-2017) and 19 % for Tunisia (2008-2015). Growth was somewhat lower in Jordan (13 %; 2008-2016) and particularly in Algeria (2 %) and consequently both of these rates were lower than the overall increase recorded for the EU-27 (19 %).

Table 5.3: GDP per inhabitant, 2008-2018
(EUR)

	2008	2010	2012	2014	2016	2018
EU-27 ⁽¹⁾	25 260	24 900	25 750	26 550	28 160	30 160
Algeria ⁽²⁾	3 366	3 359	4 232	4 120	3 539	3 441
Egypt ⁽²⁾⁽³⁾	1 489	2 056	2 605	2 608	2 680	1 834
Israel	20 059	23 179	25 310	28 408	33 740	35 293
Jordan	3 181	3 571	3 756	3 693	3 608	:
Lebanon	:	:	:	:	:	:
Libya ⁽²⁾	8 972	8 969	10 877	:	:	:
Morocco	2 025	2 207	2 343	2 459	2 709	2 835
Palestine	1 264	1 777	2 209	2 297	2 783	2 582
Tunisia ⁽²⁾	2 937	3 132	3 237	3 241	:	:

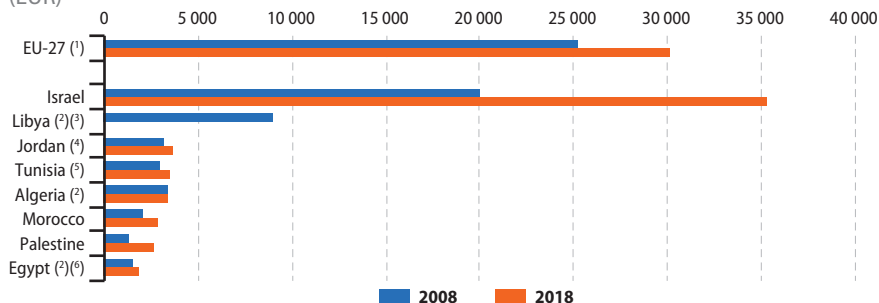
(1) Rounded values.

(2) Based on the 1993 system of national accounts.

(3) 2017 instead of 2018.

Source: Eurostat (online data code: [nama_10_pc](#))

Figure 5.2: GDP per inhabitant, 2008 and 2018
(EUR)



Note: Lebanon, not available.

(1) Rounded values.

(2) Based on the 1993 system of national accounts.

(3) 2018: not available.

(4) 2016 instead of 2018.

(5) 2015 instead of 2018. 2008: based on the 1993 system of national accounts.

(6) 2017 instead of 2018.

Source: Eurostat (online data code: [nama_10_pc](#))

The development of specific expenditure components of GDP can give valuable insights into the main drivers of economic activity. Table 5.4 and Figure 5.3 show that final consumption expenditure — in other words, expenditure by governments and households on goods and services for direct satisfaction — accounted for 74.0 % of EU-27 GDP in 2018. Gross capital formation — which largely consists of investment — accounted for 21.9 % of the EU-27 GDP, while the remaining 4.2 % was attributed to the EU-27 trade surplus.

Israel was the only ENP-South country that did not have a trade deficit in 2018. This has implications for an analysis of expenditure, as the existence of a trade deficit results in the combined shares of final consumption expenditure and gross

capital formation exceeding GDP (by an amount equivalent to the value of the deficit). This explains why, for example, final consumption expenditure alone accounted for a 115.9 % share of GDP in Palestine and may also provide one reason why the relative weight of final consumption expenditure in Lebanon (2017 data), Jordan (2016 data), Egypt (2017 data), Tunisia (2015 data) and Morocco was higher than in the EU-27, as was also the case for Israel. As such, among the ENP-South countries for which data are available, Algeria was the only one to record a share for final consumption expenditure relative to GDP that was lower than in the EU-27. Algeria and Morocco recorded notably high shares of gross capital formation within GDP, while Egypt (2017 data) recorded the lowest share.

Table 5.4: Expenditure components as a share of GDP, 2008 and 2018 (%)

	Final consumption expenditure		Gross capital formation		Trade balance	
	2008	2018	2008	2018	2008	2018
EU-27	75.1	74.0	24.0	21.9	0.9	4.2
Algeria ⁽¹⁾	43.4	59.6	37.3	47.1	19.3	-6.7
Egypt ⁽¹⁾⁽²⁾	83.2	96.9	22.4	15.3	-5.6	-12.2
Israel	80.5	77.8	20.2	21.8	-0.6	0.4
Jordan ⁽³⁾	99.2	101.4	30.2	19.4	-29.4	-20.7
Lebanon ⁽³⁾⁽⁴⁾	100.9	105.0	28.2	19.8	-29.0	-24.8
Libya ⁽¹⁾	22.0	:	23.0	:	55.0	:
Morocco	75.1	77.0	39.1	33.5	-14.2	-10.6
Palestine ⁽⁵⁾	131.6	115.9	20.6	24.2	-52.2	-39.9
Tunisia ⁽⁶⁾	77.5	90.9	25.5	20.0	-3.0	-10.9

⁽¹⁾ Based on the 1993 system of national accounts.

⁽²⁾ 2017 instead of 2018.

⁽³⁾ 2016 instead of 2018.

⁽⁴⁾ Gross capital formation, 2017: estimate made for the purpose of this publication.

⁽⁵⁾ Final consumption expenditure includes net errors and omissions.

⁽⁶⁾ 2008: based on the 1993 system of national accounts. 2015 instead of 2018.

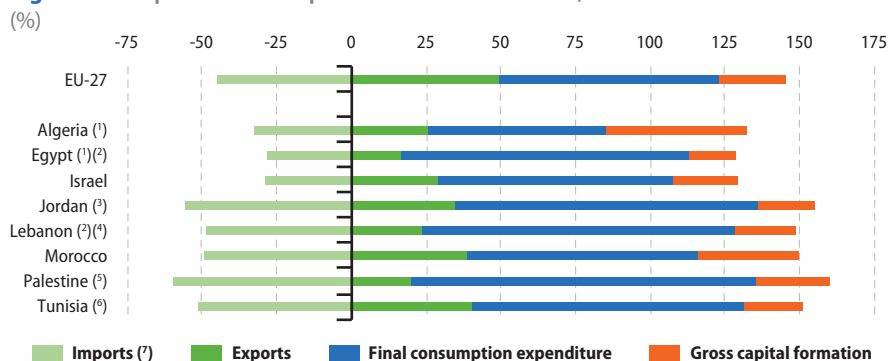
Source: Eurostat (online data code: [nama_10_gdp](#))



Phenomena such as technological change, developments in relative prices, outsourcing and globalisation, have fuelled a range of structural changes in economic systems. Quite often these have resulted in manufacturing activities and some services (those that can be provided remotely, for example through call centres) being moved to lower labour-cost regions. Alongside

these structural changes the relative weight of individual activities may also be impacted by the business cycle: for example, the global financial and economic crisis which started in 2008 and its aftermath had a particularly large impact on industrial activities and the construction sector within the EU-27 economy.

Figure 5.3: Expenditure components as a share of GDP, 2018



Note: Libya, not available.

⁽¹⁾ Based on the 1993 system of national accounts.

⁽²⁾ 2017.

⁽³⁾ 2016.

⁽⁴⁾ Gross capital formation: estimate made for the purpose of this publication.

⁽⁵⁾ Final consumption expenditure includes net errors and omissions.

⁽⁶⁾ 2015.

⁽⁷⁾ Shown as a negative value.

Source: Eurostat (online data code: [nama_10_pc](#))

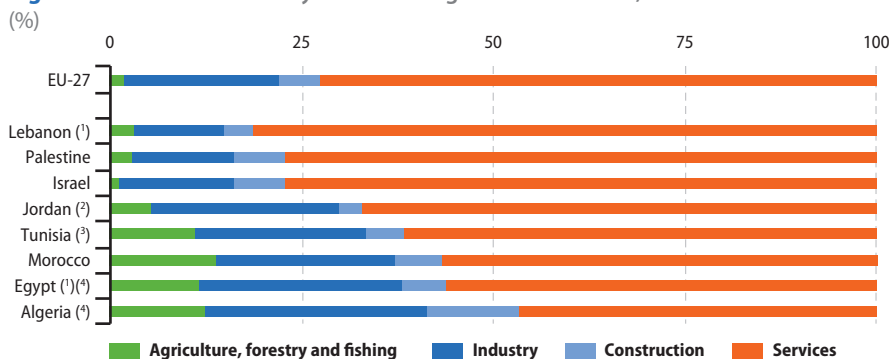
Figure 5.4 shows that the services sector contributed almost three quarters (72.7 %) of the total gross value added generated in the EU-27 economy in 2018, whereas 20.1 % came from industry, 5.4 % from construction and 1.8 % from agriculture, forestry and fishing.

In 2018, the structure of the Israeli, Lebanese (2017 data) and Palestinian economies was similar to that of the EU-27. Lebanon and Palestine had smaller industrial sectors, while in Israel the sector for agriculture, forestry and fishing was slightly

smaller than that in the EU-27, as was the industrial sector. All three had larger services sectors.

In the remaining five ENP-South countries for which data are available, the sector for agriculture, forestry and fishing was considerably larger than that in the EU-27, while the industrial sector was also several percentage points bigger. By contrast, the services sector in these countries was often considerably smaller than in the EU-27. The relative importance of the construction sector was more irregular, with Algeria reporting a share considerably above that of the EU-27.

Figure 5.4: Economic activity structure of gross value added, 2018



Note: ranked on services. Libya: not available.

⁽¹⁾ 2017.

⁽²⁾ 2016. Estimates.

⁽³⁾ 2015.

⁽⁴⁾ Based on the 1993 system of national accounts.

Source: Eurostat (online data code: nama_10_a10)

Government finance

Net lending (+)/net borrowing (-) is a national accounts balancing item. It is most frequently used in the context of the excessive deficit procedure and government finance statistics. When the balancing item is positive, then the public balance — in other words, the difference between government spending and income — is said to be in surplus, whereas when it is negative, there is a deficit.

Relatively long time series for general government deficits are available for a few of the ENP-South countries (see Table 5.5). The EU-27 reported a deficit every year between 2008 and 2018. Measured in relation to GDP, the EU-27 deficit narrowed from 6.0 % in 2009 and 2010 to 0.4 % in 2018. In keeping with the latest developments for the EU-27, Israel also reported an unbroken series of deficits between 2008 and 2018, with a peak in 2009 at almost the same level (6.5 % of GDP) as in the EU-27

and its ratio dropping to 1.0 % in 2017 (which was also similar to the ratio in the EU-27) before returning to 3.6 % in 2018. Tunisia's only surplus between 2008 and 2014 occurred in 2009. In Algeria, the public balance also recorded deficits throughout the period shown, in the range of 10-20 % of GDP until 2016 after which there was a contraction to single figure deficits; at least part of this development can be connected to the effects of the global economic slowdown and the fall in oil/gas prices. By contrast, between 2008 and 2010 Morocco reported a government

surplus, whereas from 2011 a deficit was recorded; the deficit widened in 2012 to 4.2 % of GDP, before falling back under 3.0 % between 2013 and 2017.

The latest data available (see Figure 5.5) show a narrowing of the general government deficit in Algeria between 2008 and 2018. In Israel the ratio of the general government deficit to GDP was the same in 2018 as it had been in 2008 while in Morocco the balance moved from a relatively large surplus in 2008 to a relatively small one in 2017.

Table 5.5: General government deficit/surplus relative to GDP, 2008-2018

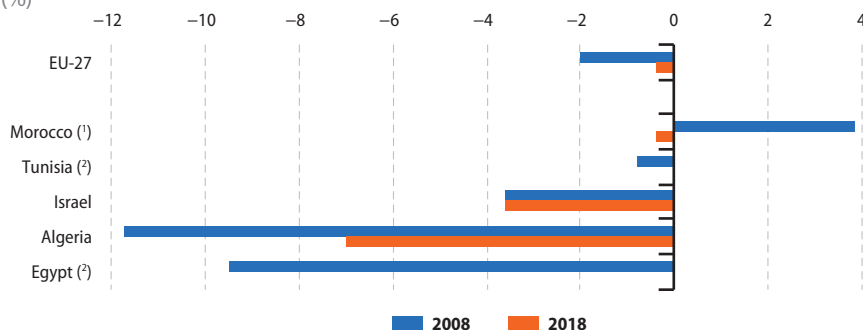
(%)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	-2.0	-6.0	-6.0	-4.1	-3.6	-2.9	-2.4	-1.9	-1.3	-0.8	-0.4
Algeria	-11.7	-9.7	-11.6	-16.2	-20.1	-12.8	-17.8	-18.6	-13.1	-6.6	-7.0
Egypt	-9.5	-8.8	-10.6	:	:	:	:	:	:	:	:
Israel	-3.6	-6.5	-3.7	-3.0	-4.4	-4.0	-2.4	-1.0	-1.4	-1.0	-3.6
Jordan	:	:	:	:	:	:	:	:	:	:	:
Lebanon	:	:	:	:	:	:	:	:	:	:	:
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	3.9	1.5	0.2	-2.5	-4.2	-2.5	-1.1	-1.5	-1.0	-0.4	:
Palestine	:	:	:	:	:	:	:	:	:	:	:
Tunisia	-0.8	0.8	-0.5	-3.2	-3.6	-3.3	-2.6	:	:	:	:

Source: Eurostat (online data code: gov_10dd_edpt1)

Figure 5.5: General government deficit/surplus relative to GDP, 2008 and 2018

(%)



Note: Jordan, Lebanon, Libya and Palestine, not available.

(†) 2017 instead of 2018.

(‡) 2018: not available.

Source: Eurostat (online data code: gov_10dd_edpt1)

Balance of payments and foreign direct investment

The balance of payments records all economic transactions between resident and non-resident entities during a given period. Note that while a majority of the information that is presented relates to the International Monetary Fund's new compilation standard of the sixth balance of payments manual there are some data (detailed in individual footnotes) based on the previous edition of these standards.

The current account of the balance of payments covers international transactions in goods, services, income and current transfers; as such it may be used to analyse the exposure of an economy to the rest of the world.

The EU-27 current account surplus was EUR 405.6 billion in 2018, corresponding to 3.0 % of GDP; this information relates exclusively to flows with countries outside of the European Union (EU) (extra-EU flows). The latest developments for the EU-27 current account show a continuation of patterns first established in 2009: while the current account deficit peaked at 1.4 % of GDP in 2018, it turned into a surplus equivalent to 0.3 % of GDP in 2009. This surplus grew in consecutive

years to 3.3 % of GDP by 2016, before dropping back to 3.0 % in 2018. The EU-27 current account surplus in 2018 was constituted by the following contributions from its different components: surpluses for goods (1.9 % of GDP), services (1.1 % of GDP) and primary income (0.4 % of GDP) were balanced somewhat by a deficit for secondary income (0.5 % of GDP) (see Table 5.6).

Analysing the latest data available, Israel was the only ENP-South country to report a current account surplus (2.6 % of GDP in 2018). This position could be attributed to its relatively large surplus for services (5.4 % of GDP) and smaller surplus for secondary income (2.1 % of GDP) which exceeded the deficit for goods (4.9 % of GDP) and balanced position (0.0 % of GDP) for primary income. Each of the remaining ENP-South countries recorded current account deficits in the latest year for which data are available, with a peak of 22.7 % of GDP in Lebanon in 2017. This reflected a current account deficit for goods which was 27.0 % of GDP. Whereas all of the ENP-South countries for which data are available recorded current account deficits for international trade in goods, only Algeria and Palestine also recorded deficits for international trade in services.

Table 5.6: Components of the current account balance relative to GDP, 2018 (%)

	Goods	Services	Primary income	Secondary income
EU-27	1.9	1.1	0.4	-0.5
Algeria	-4.1	-4.9	-2.6	1.9
Egypt	:	:	:	:
Israel	-4.9	5.4	0.0	2.1
Jordan	:	:	:	:
Lebanon ⁽¹⁾(2)	-27.0	2.4	-0.4	2.3
Libya	:	:	:	:
Morocco	-17.1	6.8	-1.9	6.8
Palestine	-32.9	-6.9	16.4	12.1
Tunisia ⁽²⁾(3)	-11.7	0.7	:	:

(1) 2017.

(2) Based on the fifth edition of the Balance of Payments Manual.

(3) 2015.

Source: Eurostat (online data codes: bop_eu6_q and nama_10_gdp)

Foreign direct investment (FDI) statistics provide information on one component of the financial account; they describe the situation when an entity that is resident in one country seeks to obtain a lasting interest in an enterprise that is resident in another. Note that as of 2013 there was a methodological change for EU data and that the statistics presented from this reference year onwards are based on new standards — as provided by the Balance of Payments Manual, 6th edition and the Benchmark Definition of FDI, 4th edition. These new standards have been applied for data covering Algeria, Israel and Morocco while the data for Tunisia are based on the previous (fifth) edition of the manual.

FDI data for the EU-27 are only available for a few years, but these show that it was a net investor abroad between 2013 and 2016, and a net recipient of investment in 2017 and 2018.

Among the five ENP-South countries for which data are available (see Tables 5.7 and 5.8), Israel received by far the largest flows of inward FDI (EUR 17.6 billion) in 2018, some 5.7 times as much as received by Morocco (EUR 3.1 billion) which had the second highest level of inflows. FDI inflows to Lebanon (EUR 2.2 billion), Algeria (EUR 1.3 billion) and Tunisia (EUR 0.9 billion) were smaller. All five of the ENP-South countries for which data are available were normally net recipients of FDI between 2008 and 2018, the exceptions being Israel which was a net investor in 2010 and 2016 and Algeria which was a net investor in 2015.

Table 5.7: Foreign direct investment (FDI) outflows, 2008-2018
(million EUR)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	:	:	:	:	:	643 793	203 711	1 016 490	449 657	180 796	-103 421
Algeria	54	209	51	42	58	48	42	2 312	42	119	745
Egypt	:	:	:	:	:	:	:	:	:	:	:
Israel	4 902	1 256	5 992	5 317	1 771	2 905	3 406	9 886	13 171	5 447	5 179
Jordan	:	:	:	:	:	:	:	:	:	:	:
Lebanon (*)	670	808	367	673	801	1 487	933	595	908	1 168	1 061
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	334	335	444	130	314	248	334	592	619	885	568
Palestine	:	:	:	:	:	:	:	:	:	:	:
Tunisia (*)	110	121	140	520	45	52	40	46	256	72	55

(*) Based on the fifth edition of the Balance of Payments Manual.

Source: Eurostat (online data code: [bop_fdi6_flow](#))

Table 5.8: Foreign direct investment (FDI) inflows, 2008-2018
(million EUR)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	:	:	:	:	:	618 276	143 012	803 285	328 703	209 462	-67 421
Algeria	1 845	2 184	1 777	1 881	1 196	1 317	1 177	1 786	1 479	1 184	1 276
Egypt	:	:	:	:	:	:	:	:	:	:	:
Israel	6 986	3 303	5 269	6 216	7 019	8 917	4 553	10 217	10 830	16 083	17 602
Jordan	:	:	:	:	:	:	:	:	:	:	:
Lebanon (*)	2 720	3 142	2 793	2 254	2 419	2 003	2 154	1 945	2 320	2 236	2 228
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	1 714	1 390	1 186	1 871	2 112	2 468	2 729	2 948	1 987	2 327	3 106
Palestine	:	:	:	:	:	:	:	:	:	:	:
Tunisia (*)	1 886	1 218	1 147	831	1 254	848	813	921	819	792	892

(*) Based on the fifth edition of the Balance of Payments Manual.

Source: Eurostat (online data code: [bop_fdi6_flow](#))

Inflation

Inflation may be defined as the increase in the general level of prices of goods and services in an economy; the reverse situation, when the general level of prices falls, is called deflation. Inflation and deflation are usually measured by consumer price indices (or retail price indices). Other factors (such as wages) being equal, inflation in an economy means that the purchasing power of consumers falls as they are no longer able to purchase the same amount of goods and services with the same amount of money.

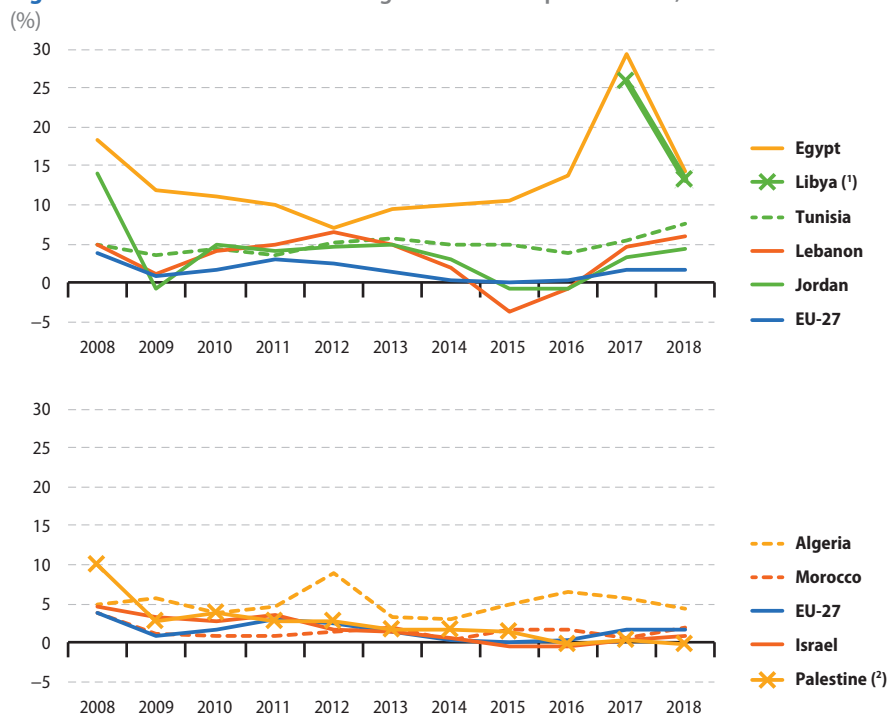
Compared with historical developments, the EU-27 harmonised index of consumer prices (HICP) rose at a relatively modest pace during the period 2008-2018. In the run-up to the global financial and economic crisis and in its immediate aftermath there was considerable volatility in food and, especially, energy price developments. However, the inflation rate was relatively subdued thereafter, with the six latest year-on-year rates of change for 2013-2018 ranging from 0.2 % to 1.8 % (see Figure 5.6).

Price inflation was usually higher in the ENP-South countries than it was in the EU-27, in some cases much higher. This was true in the run-up to the crisis, as consumer prices in the ENP-South countries in 2008 ranged between 3.9 % and 5.0 %, with Palestine (9.9 %), Jordan (14.0 %) and Egypt (18.3 %) above this range (no data for Libya). By contrast, in the EU-27 inflation was 3.7 % in 2008.

After the crisis, and similar to developments for the EU-27, there was a return to more subdued price changes in several of the ENP-South countries. For example, there was modest deflation in Jordan in 2009 (down 0.7 %) and in more recent years prices fell in Israel, Jordan and Lebanon (in 2015 and in 2016), as well as in Palestine (in 2016 and 2018). By contrast, some ENP-South countries recorded recent upswings in prices: this was most notably the case in Egypt as inflation moved from 7.1 % in 2012 to 13.8 % in 2016, spiked at 29.5 % in 2017 and dropped back to 14.4 % in 2018. Jordan and Lebanon both moved from negative rates of change in 2015 and 2016 to increasingly high, positive rates of change in 2017 and 2018.



Figure 5.6: Inflation — annual change in consumer price indices, 2008-2018



(¹) 2008-2016: not available.

(²) Estimates.

Source: Eurostat (online data code: [prc_hicp_aind](#))

6

International trade in goods



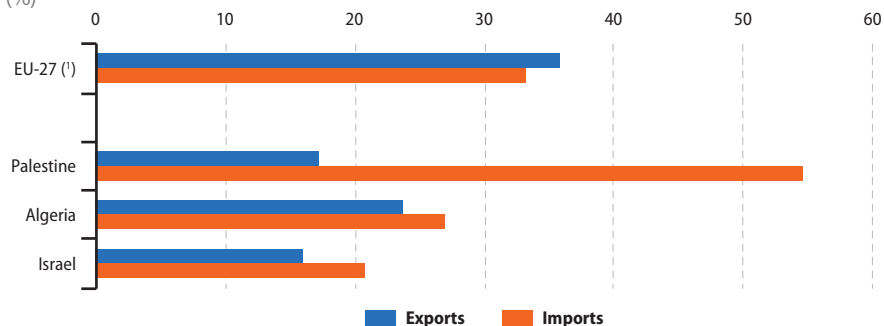
Trade in goods with the rest of the world

The relative importance of international trade within an economy can be seen from the relationship between exports/imports of goods and gross domestic product (GDP) — see Figures 6.1 and 6.2. These data are available for three ENP-South countries — Algeria, Israel and Palestine — as well as the European Union (EU). Note that the national accounts export and import values used in these calculations may differ for methodological reasons from statistics covering the international trade of goods.

Smaller economies often rely more (in relative terms) on exports and imports, in part reflecting their need to trade in a variety of goods that they do not produce on their national territory. The highest ratio of exports of goods relative to GDP in 2018 among the ENP-South countries was recorded in Algeria (23.7 %) while the highest ratio for imports of goods relative to GDP was in Palestine (54.5 %) — see Figure 6.1. By contrast, the lowest ratios for both flows were in Israel, 15.9 % for exports and 20.8 % for imports. As the ratio for imports was higher than that for exports in all three ENP-South countries, they each recorded deficits for trade in goods in 2018. This was in contrast to the EU-27 which recorded a trade surplus (for extra-EU and intra-EU trade flows combined).

Figure 6.1: Value of international trade in goods relative to GDP, 2018

(%)



Note: ranked on the combined shares of exports and imports. Egypt, Jordan, Lebanon, Libya, Morocco and Tunisia: not available.

(¹) Includes extra-EU and intra-EU trade.

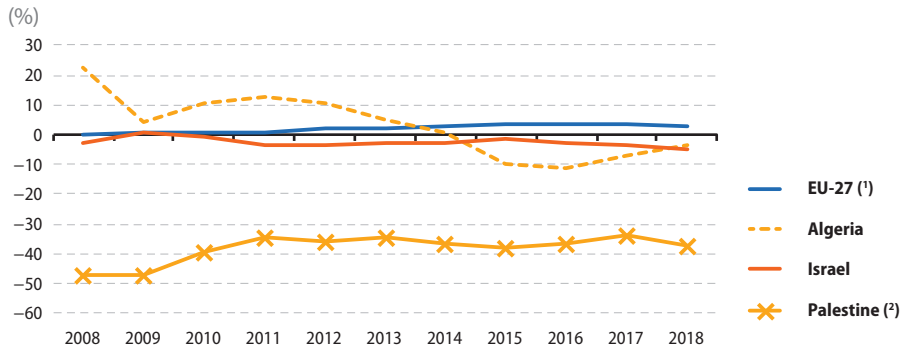
Source: Eurostat (online data code: [nama_10_gdp](#))



Figure 6.2 presents the development of the trade balance for goods (relative to GDP) between 2008 and 2018. The development was fairly regular for the EU-27, moving from a balanced position in 2008 to a small surplus in 2009 and progressively larger surpluses most years through until 2016; in 2017 and 2018 there were contractions in the size of the surplus relative to GDP. For two of the three ENP-South countries for which data are available the trade balance for goods was somewhat more volatile, Israel being the exception. In Palestine, the trade deficit for goods narrowed between 2008 and 2011 and thereafter remained relatively stable. As a consequence, in 2018 the ratio of the trade deficit for goods to GDP was 10.3 percentage

points narrower than in 2008. By contrast, in Algeria the surplus (22.4 % of GDP) recorded in 2008 shrank considerably in 2009 (to 4.1 %), rebounded somewhat in 2010 and 2011 (to reach 12.9 %) before declining steadily. Between 2014 and 2015 Algeria moved from a small surplus to a relatively large deficit (10.2 %) which increased slightly in 2016 (11.0 %) before narrowing (to a deficit of 3.3 %) in 2018. While the situation in Israel was comparatively less volatile, it did move from a deficit in 2008 (2.7 % of GDP) to a surplus in 2009 (0.4 %) and then back to a deficit in 2010 (0.8 %). Between 2010 and 2018 the deficit stayed below 4.0 %, widening in 2018 to 4.9 % of GDP.

Figure 6.2: Value of the trade balance for goods relative to GDP, 2008-2018



Note: Egypt, Jordan, Lebanon, Libya, Morocco and Tunisia, not available.

⁽¹⁾ Includes extra-EU and intra-EU trade.

⁽²⁾ 2008-2017: estimates.

Source: Eurostat (online data code: [nama_10_gdp](#))

The remainder of the statistics presented in this chapter are from statistics on the international trade in goods, rather than national accounts. Data for the EU-27 refer exclusively to extra-EU trade.

The EU-27 recorded a trade surplus for goods with non-member countries in 2018 valued at EUR 152.1 billion. Equally, all of the ENP-South countries for which data are available recorded deficits for international trade in goods in 2018 (2016 data for Libya; no recent data for Lebanon). Imports of goods exceeded exports by as much as EUR 44.6 billion in Egypt, while Morocco recorded a trade deficit of EUR 18.6 billion (see Table 6.1).

The export of goods by the EU-27 increased by 45 % in current price terms over the period 2008-2018, while imports increased by 23 %, the difference in these growth rates leading to the transition from a trade deficit in 2008 to a surplus in 2018. There was also an expansion in the level of goods both imported and exported across several of the ENP-South countries (for which data are available) during this period, despite sometimes large reductions in international trade during the financial and economic crisis; the exceptions were falls of 4 %, 34 % and 71 % in goods exported from Jordan, Algeria and

Libya (2008-2016). Note that Algerian and Libyan exports of goods are dominated by mineral fuels (petroleum and gas), lubricants and related materials and can vary greatly due to relatively volatile prices. Particularly strong export growth between 2008 and 2018 was recorded in Palestine where the value of goods exported more than doubled, increasing by 155 %.

The value of imported goods into Palestine and Egypt was more than twice as high in 2018 as it had been in 2008, while imported goods increased by more than 50 % in Libya (2008-2016) and Morocco. The smallest increases in the level of goods imported — under 20 % — were recorded in Jordan and Tunisia, both of which therefore recorded imports expanding at a slower pace than in the EU-27 (up 23 %) during the 10-year period shown in Table 6.1.

The result of these developments for exports and imports was that Algeria's and Libya's trade surpluses for goods in 2008 turned into deficits by 2018 for Algeria and 2016 for Libya. All of the remaining ENP-South countries for which data are available reported larger trade deficits for goods in 2018 than in 2008, most notably (in relative terms) Egypt and Israel.

Table 6.1: Value of international trade in goods, 2008 and 2018
(million EUR)

	Exports		Imports		Trade balance	
	2008	2018	2008	2018	2008	2018
EU-27 ⁽¹⁾	1 420 849	2 059 723	1 554 636	1 907 611	-133 788	152 112
Algeria	53 709	35 357	27 113	39 809	26 596	-4 452
Egypt	17 803	24 843	32 196	69 462	-14 393	-44 619
Israel	41 925	52 462	44 546	64 874	-2 621	-12 412
Jordan	5 709	5 503	12 223	14 420	-6 514	-8 917
Lebanon ⁽²⁾	1 673	:	6 835	:	-5 163	:
Libya ⁽³⁾	30 413	8 826	6 221	9 440	24 192	-614
Morocco ⁽⁴⁾	13 718	24 842	28 714	43 422	-14 996	-18 580
Palestine	384	977	2 382	5 528	-1 999	-4 551
Tunisia	13 103	13 112	16 763	19 134	-3 661	-6 023

⁽¹⁾ Extra-EU-27 trade (trade with non-member countries).

⁽²⁾ 2007 instead of 2008.

⁽³⁾ 2016 instead of 2018.

⁽⁴⁾ 2018: break in series caused by the adoption of the general system of trade.

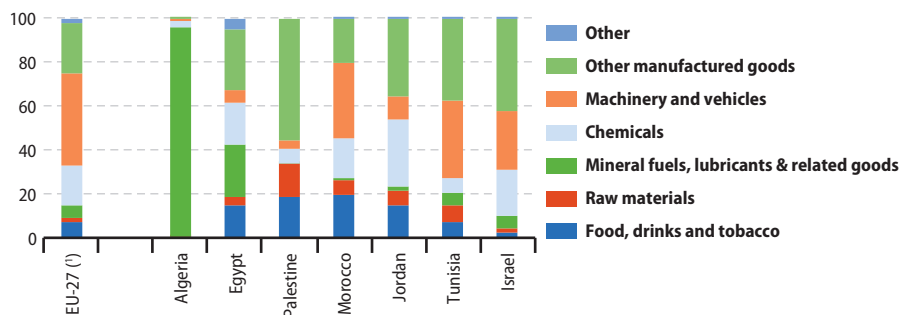
Source: Eurostat (online data code: [ext_lt_intratrd](#))

The most important product group for exported goods (based on the standard international trade classification) for the EU-27 in 2018 was that of machinery and vehicles (see Figure 6.3), which accounted for 41.6 % of EU-27 exports, a considerably higher share than for other manufactured goods (23.0 %) or chemicals (18.2 %); none of the remaining product groups shown accounted for more than a tenth of the goods exported by the EU-27 in 2018.

There were considerable differences in the structure of the goods exported from ENP-South countries and those from the EU-27. Mineral fuels, lubricants and related goods accounted for almost all (94.6 %) of the total value of goods exported from Algeria in 2018 and around one

quarter (24.6 %) of those exported from Egypt. The percentage of exports accounted for by food, drinks and tobacco was highest in Morocco (19.6 %), Palestine (19.4 %), Jordan (15.3 %) and Egypt (15.0 %) where this category represented at least twice the share recorded in the EU-27 (7.3 % of the total value of goods exported). Other manufactured goods accounted for more than half (55.8 %) of the goods exported from Palestine and for more than two fifths (41.8 %) of the goods exported from Israel. Exports of machinery and vehicles accounted for at least one third of the total value of goods exported from Tunisia (35.6 %) and Morocco (34.2 %). Exports of chemicals accounted for just over three tenths (30.5 %) of the total value of goods exported from Jordan in 2018.

Figure 6.3: Structure of the value of exports analysed by broad group of goods, 2018 (%)



Note: ranked on the combined share of i) food, drinks and tobacco ii) raw materials and iii) mineral fuels, lubricants and related goods. Lebanon and Libya: not available.

(*) Extra-EU-27 trade (trade with non-member countries).

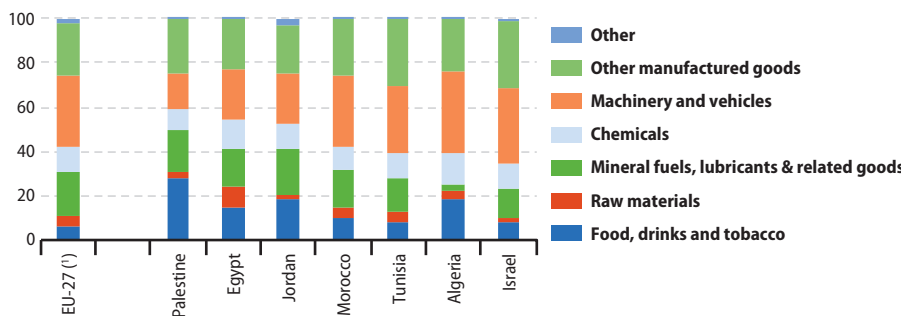
Source: Eurostat (online data code: [ext_lt_intratrd](#))

Figure 6.4 shows that the structure of imported goods was broadly comparable across most of the ENP-South countries and in relation to the EU-27. The three largest categories of imports (in value terms) were generally mineral fuels, lubricants and related goods; machinery and vehicles; other manufactured goods. Together these three groups accounted for just over three quarters (76.5 %) of goods imported into the EU-27 in 2018.

A similar pattern was observed for many of the ENP-South countries, although there were

exceptions. In Algeria imports of mineral fuels, lubricants and related goods were particularly low, as were imports of machinery and vehicles in Palestine, such that food, drink and tobacco appeared amongst the top three groups of goods that were imported into both of these countries. The relatively low share of mineral fuels, lubricants and related goods among imports in several ENP-South countries may, among other factors, be attributed to national supplies/endowments of energy sources, less demand for energy to heat homes, and/or lower motorisation rates.

Figure 6.4: Structure of the value of imports analysed by broad group of goods, 2018 (%)



Note: ranked on the combined share of i) food, drinks and tobacco ii) raw materials and iii) mineral fuels, lubricants and related goods. Lebanon and Libya: not available.

(¹) Extra-EU-27 trade (trade with non-member countries).

Source: Eurostat (online data code: [ext_lt_intratrd](#))



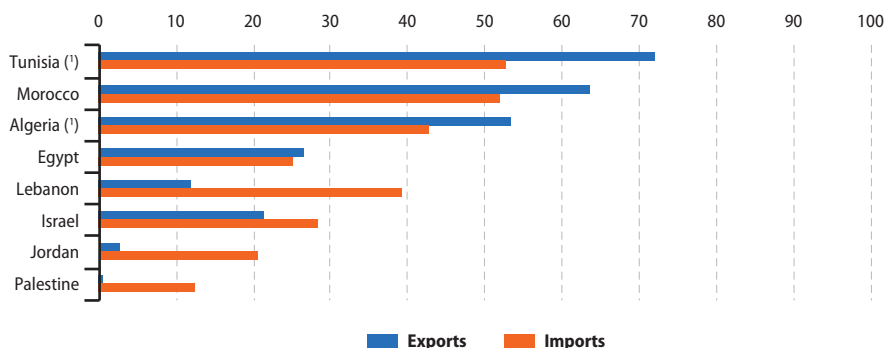
Trade in goods with the EU

There are generally close links between the EU-27 and many of the ENP-South countries in relation to the international trade of goods. This was particularly true for some of the Maghreb countries: the EU-27 accounted for a majority of the total

trade (imports plus exports combined) in goods for Tunisia, Morocco and Algeria (see Figure 6.5). By contrast, the EU-27 was relatively less important as a partner for Palestinian international trade while the share of Jordanian exports destined for the EU-27 was also relatively low.

Figure 6.5: Proportion of the value of exports and imports of goods accounted for by the EU-27, 2018

(%)



Note: Libya, not available. As reported by the ENP-South countries.

(*) 2017.

Source: United Nations (Comtrade)

Table 6.2 and Figures 6.6 and 6.7 are based on trade data reported by EU Member States. Exports of goods from the EU-27 to the ENP-South countries in 2018 were valued at EUR 104.6 billion in 2018, while imports into the EU-27 from ENP-South countries were valued at EUR 80.7 billion. In 2018, the main source of imports of goods into the EU-27 from ENP-South countries was Algeria (see Table 6.2), followed by Libya, Morocco and Israel, all with EUR 12.4-18.4 billion of exports to the EU-27. Morocco was the largest ENP-South market for EU-27 exports of goods, followed by Israel, Algeria and Egypt, all receiving EUR 18.0-22.5 billion of exports from the EU-27. The EU-27 recorded a trade surplus for its trade in goods with nearly all of the

ENP-South countries in 2018, the one exception being Libya with which it had a trade deficit (see Table 6.2).

There was an increase in exports from the EU-27 to the ENP-South countries between 2008 and 2018 while its imports from these countries declined. Exports expanded by EUR 29.9 billion (up 40 %) while imports declined by EUR 15.7 billion (down 16 %). As a result the EU-27 moved from a deficit for trade in goods with the ENP-South countries collectively of EUR 21.7 billion in 2008 to a surplus of EUR 23.9 billion in 2018.

This overall pattern masks a variety of developments in trade between the EU-27 and the ENP-South countries. Trade with Palestine increased most strongly, imports into the EU-27

more than doubled (although remained small in absolute terms; up 139 %) while exports from the EU-27 more than quadrupled (up 310 %). EU-27 imports from and exports to Morocco, Lebanon, Israel, Egypt and Tunisia were also all higher in current price terms in 2018 than they had been in 2008. EU-27 exports to Jordan increased 22 % over the period studied while imports from Jordan were almost the same (down 1 %) in 2018 as they had been in 2008. Exports from the EU-27 to Algeria increased by

a similar amount (up 23 %) to that observed for Jordan, but imports from Algeria fell much more strongly between 2008 and 2018 (down 32 %). The EU-27 recorded lower levels of trade — both for imports and for exports — with Libya in 2018 than had been the case in 2008. Between 2008 and 2018 the EU-27 deficit with Libya narrowed and its deficit with Algeria turned into a small surplus. The EU-27 trade surpluses with the other ENP-South countries were all greater in 2018 than they had been in 2008.

Table 6.2: Value of international trade in goods with ENP-South countries, EU-27, 2008 and 2018
(million EUR)

	EU-27 imports from partner		EU-27 exports to partner		EU-27 trade balance with partner	
	2008	2018	2008	2018	2008	2018
Algeria	27 202	18 435	15 074	18 510	-12 128	75
Egypt	7 491	7 640	11 653	18 000	4 162	10 360
Israel	10 009	12 406	12 572	19 413	2 563	7 007
Jordan	276	273	2 698	3 293	2 423	3 019
Lebanon	296	477	3 615	6 836	3 319	6 359
Libya	34 137	16 117	5 511	4 372	-28 626	-11 745
Morocco	7 986	15 366	13 859	22 476	5 873	7 110
Palestine	6	14	57	235	52	221
Tunisia	9 036	9 963	9 651	11 445	615	1 482

Note: as reported by EU Member States.

Source: Eurostat (online data code: DS-018995)

Figures 6.6 and 6.7 provide a summary of the trade in goods between the EU-27 and the ENP-South countries analysed for seven main product groupings (based on the standard international trade classification).

A country's endowment with natural resources often leads to it becoming specialised in the production of certain industrial goods and this in turn may affect the structure of its imports and exports. Mineral fuels, lubricants and related materials accounted for almost all of the goods that EU-27 imported in 2018 from Libya (99.3 %) and from Algeria (95.2 %) and more than one third (37.2 %) of the goods imported from Egypt (see Figure 6.6). The largest category of goods imported by the EU-27 from Jordan and Israel was

chemicals, accounting for 41.8 % and 40.0 % of the total respectively. Each of the remaining ENP-South countries had a different specialisation in terms of which products were most imported into the EU-27: around half (50.5 %) of the goods imported by the EU-27 from Palestine were food, drinks and tobacco; manufactured goods accounted for more than two fifths (41.7 %) of all goods imported by the EU-27 from Tunisia; just over two fifths (41.4 %) of all imports from Morocco were machinery and vehicles; more than one third (35.3 %) of all imported goods from Lebanon were raw materials.

There was a clearer pattern in relation to the principal groups of goods that were exported from the EU-27 to the ENP-South countries in 2018 (see Figure 6.7). Machinery and vehicles

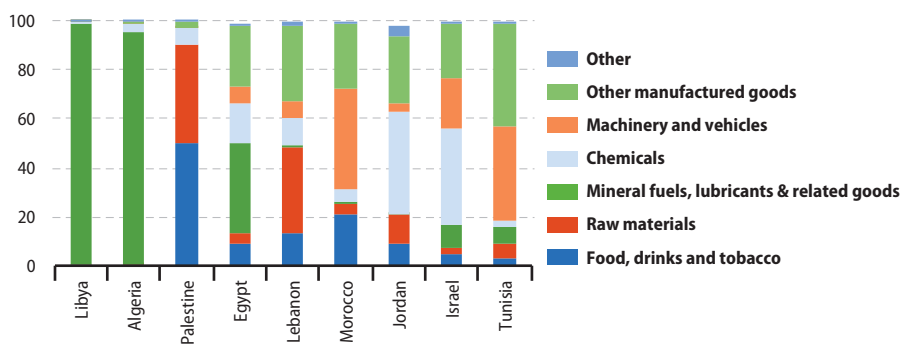


had the highest shares of exports from the EU-27 to six of the nine ENP-South countries as well as the second highest share for one more (Tunisia) and the third highest share for the other two (Lebanon and Libya). Other manufactured goods had the highest share for exports to Tunisia and the second highest share for Algeria, Egypt, Israel, Jordan, Lebanon and Morocco. The

highest share of exports to Lebanon and Libya was recorded for mineral fuels, lubricants and related goods, with this category also having the third highest shares of exports to Morocco and Tunisia. Food, drinks and tobacco also accounted for relatively high shares of goods exported to Libya, Palestine and Jordan.

Figure 6.6: Structure of the value of imports from ENP-South countries analysed by broad group of goods, EU-27, 2018

(%)

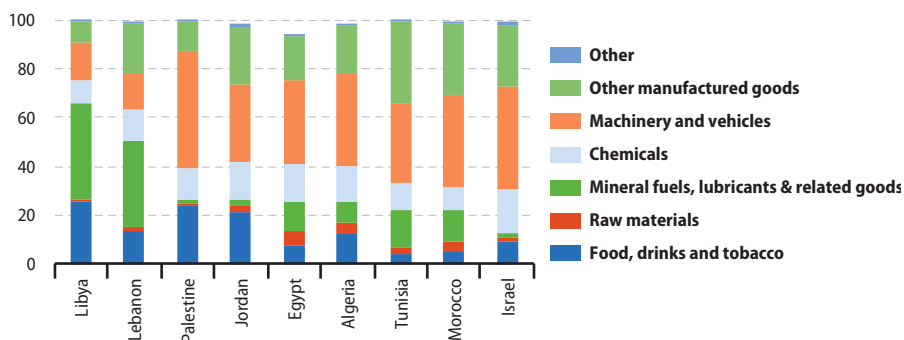


Note: as reported by EU Member States. Ranked on the combined share of i) food, drinks and tobacco ii) raw materials and iii) mineral fuels, lubricants and related goods.

Source: Eurostat (online data code: DS-018995)

Figure 6.7: Structure of the value of exports to ENP-South countries analysed by broad group of goods, EU-27, 2018

(%)



Note: as reported by EU Member States. Ranked on the combined share of i) food, drinks and tobacco ii) raw materials and iii) mineral fuels, lubricants and related goods.

Source: Eurostat (online data code: DS-018995)

7

Agriculture, forestry and fishing



Agriculture was one of the first sectors of the economy (following coal and steel) to receive the attention of European Union (EU) policymakers, and statistics on agriculture were initially designed to monitor the main objectives of the common agricultural policy. While the common agricultural policy remains one of the EU's most important policies there have been wide ranging reforms, which have led to a range of new objectives designed to correct imbalances and overproduction.

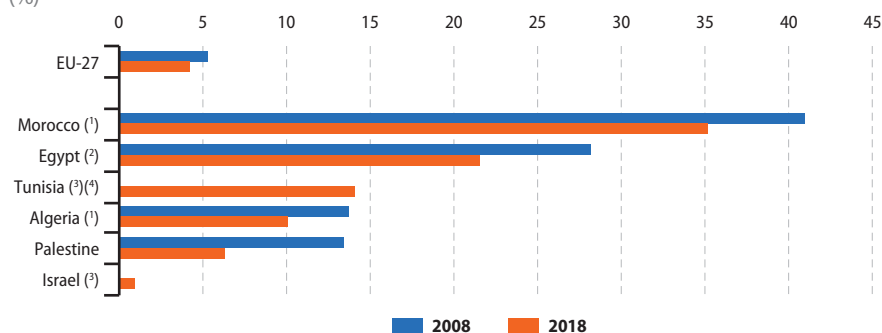
Employment in agriculture, forestry and fishing

Figure 7.1 shows an analysis of the employment share (for persons aged 15 and over) of agriculture, forestry and fishing within the whole economy. Within the EU-27, this share fell from 5.3 % in 2008 to 4.2 % by 2018.

The employment share of agriculture, forestry and fishing in the ENP-South countries (for which data are available) was generally much higher than in the EU-27, although Israel was an exception with these activities accounting for a 1.0 % share in 2018. At the other end of the range, more than one third (35.1 %; 2017 data) of the total workforce in Morocco and one fifth (21.6 %) of the total workforce in Egypt were employed in agriculture, forestry and fishing.

The share of the total workforce in agriculture, forestry and fishing fell between 2008 and 2018 in the EU-27 and the four ENP-South countries for which data are available. The contraction in Palestine was particularly large, with this share more than halving from 13.4 % to 6.3 %. More data on the labour markets of the ENP-South countries are available in Chapter 4.

Figure 7.1: Share of agriculture, forestry and fishing in total employment, 2008 and 2018
(%)



Note: for persons aged 15 and over. Jordan, Lebanon and Libya: not available.

⁽¹⁾ 2017 instead of 2018.

⁽²⁾ 2010 instead of 2008.

⁽³⁾ 2008: not available.

⁽⁴⁾ 2019 instead of 2018.

Source: Eurostat (online data code: [lfsa_egan2](#))



Agricultural land

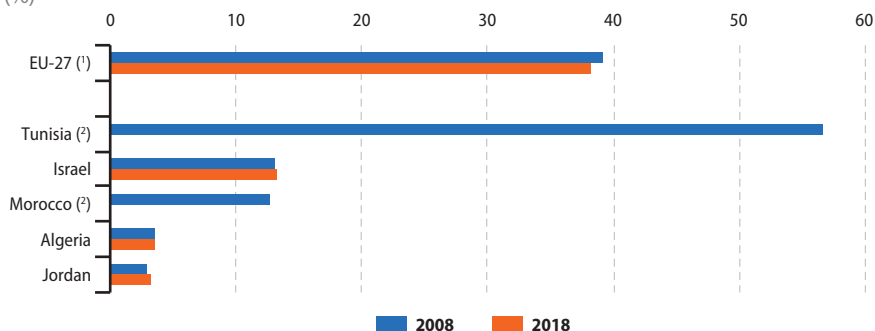
The utilised agricultural area refers to the area that is actually used for agricultural purposes. The share of land that is used for farming varies according to climate, terrain and soil type, while the level of economic development and population density may also play a role in determining land use. Within the EU-27 roughly equal proportions of the total area (around 40 %) are used for farming and for forest and woodland, with the remainder being built-up areas (villages, towns and cities), infrastructure (such as roads or railways), inland waters, scrub or waste land.

The proportion of land given over to agriculture was more than half of the total area in Tunisia

(although no recent data are available), while in the ENP-South countries for which recent data are available (see Figure 7.2) the share was considerably less than in the EU-27, reflecting the mountainous terrains and desert landscapes of some ENP-South countries. The utilised agricultural area represented 13.2 % of the total area in Israel and also accounted for more than one tenth of the total area in Morocco (no recent data available), while much lower shares were recorded in Algeria (3.6 %) and in Jordan (3.2 %).

Between the years shown in Figure 7.2 there was a fall in the ratio of the utilised agricultural area to the total area in the EU-27 (2008-2016). By contrast, in Jordan there was an increase from 2.9 % to 3.2 % between 2008 and 2018, while in Algeria and Israel the shares remained relatively stable.

Figure 7.2: Utilised agricultural area as a share of the total area, 2008 and 2018
(%)



Note: Egypt, Lebanon, Libya and Palestine, not available.

⁽¹⁾ 2016 instead of 2018.

⁽²⁾ 2018: not available.

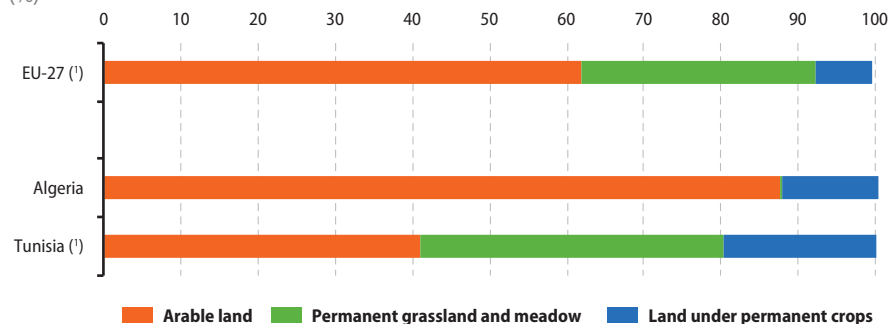
Source: Eurostat (online data codes: apro_cpsh1 and reg_area3)

Land used for farming includes arable land, permanent grassland and permanent crops (such as orchards, olive trees and vineyards); it does not include land on farms that is not cultivated for farming, for example forests and wooded areas, land under buildings or ponds. Figure 7.3 provides an analysis of the different types of farming land in the EU-27 and two of

the ENP-South countries. The structure in Tunisia had higher shares of permanent grassland and meadow and of land under permanent crops than did the EU-27, counterbalanced by a smaller share of arable land. The structure in Algeria was quite different, with a much larger share for arable land and practically no permanent grassland and meadow.

Figure 7.3: Structure of the utilised agricultural area, 2017

(%)



Note: Egypt, Israel, Jordan, Lebanon, Libya, Morocco and Palestine, not available.

(¹) 2016.

Source: Eurostat (online data code: [apro_cpsh1](#))



Crops

The distinction between crop and animal farming on one hand and the degree of specialisation in different crops and animals on the other both depend upon a number of factors. Several of the ENP-South countries are often characterised as being arid areas of unfertile soil, covered with rock and sand. Nevertheless, there are pockets of more fertile land within each of the ENP-South countries, particularly along river valleys or close to the coast. While the winter months often see

relatively high levels of rainfall, some regions receive little or no rainfall during the summer months. The variability in rainfall patterns can play a considerable role in determining the success or failure of each harvest (as reflected in the figures for harvested production).

In 2018, the largest producers of cereals among the ENP-South countries were Egypt (2017 data) and Morocco, with 17.9 million tonnes and 10.4 million tonnes of output respectively. Their main cereal crops were wheat (both countries), barley (Morocco) and grain maize (Egypt) — see Tables 7.1 and 7.2.

Table 7.1: Cereals production (excluding rice), 2008-2018
(thousand tonnes)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	292 756	276 338	262 530	268 661	260 551	285 200	305 324	289 048	277 247	284 224	271 261
Algeria ⁽¹⁾	1 534	5 252	4 002	4 246	5 134	4 911	3 432	3 755	3 432	3 470	6 057
Egypt	16 395	17 139	15 171	16 208	17 754	18 318	18 245	18 232	17 984	17 869	:
Israel	112	288	268	280	357	373	345	326	298	230	196
Jordan	47	61	87	83	84	102	78	89	99	98	81
Lebanon	384	417	:	:	:	:	:	:	182	:	:
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	5 277	10 402	7 775	8 604	5 232	9 826	6 898	11 690	3 480	9 680	10 380
Palestine	54	:	:	:	:	:	:	:	:	:	:
Tunisia ⁽²⁾	1 188	2 534	1 080	2 310	2 273	1 295	2 317	1 308	:	:	:

(1) Total: excluding summer cereals, mainly maize and sorghum.

(2) Includes wheat, barley and triticale.

Source: Eurostat (online data code: [apro_cpsh1](#))

Table 7.2: Cereals and rice production, 2018
(thousand tonnes)

	Cereals	of which:			Rice
		Wheat	Barley	Grain maize	
EU-27	271 261	124 511	50 194	69 032	2 963
Algeria ⁽¹⁾	6 057	3 981	1 957	6	:
Egypt ⁽²⁾	17 869	8 421	98	9 350	4 961
Israel	196	72	12	7	:
Jordan	81	16	47	17	:
Lebanon ⁽³⁾	182	129	49	3	2
Libya	:	:	:	:	:
Morocco	10 380	7 342	2 919	118	63
Palestine	:	:	:	:	:
Tunisia ⁽⁴⁾	1 308	927	361	:	:

(1) Total: excluding summer cereals, mainly maize and sorghum. Wheat: excluding summer cereals.

(2) 2017.

(3) 2016.

(4) Total: 2015; includes wheat, barley and triticale; excluding rice. Wheat and barley: 2016.

Source: Eurostat (online data code: [apro_cpsh1](#))

Table 7.3 provides information on the harvested quantities of a selection of fruit crops as well as information for fresh vegetables. Olives and grapes are widely cultivated in more southern parts of the EU-27 as well as in many ENP-South countries. In 2018, EU-27 production of olives and grapes was 13.7 and 27.6 million tonnes respectively. Collectively, the ENP-South countries (2017 data for Egypt and Tunisia, 2016 data for Lebanon, no data available for Libya or Palestine) produced 4.4 and 3.2 million tonnes of olives and grapes, equivalent to 32.0 % and 11.4 % of the EU-27 harvest. Morocco and Egypt were the largest producers of olives, each with harvested production exceeding 1.0 million tonnes. Alone, Egypt accounted for more than half of the production of grapes in the ENP-South countries (for which data are available). The production of dates in the ENP-South countries was 3.1 million tonnes (2017 data for Egypt and

Tunisia, no data available for Lebanon, Libya or Palestine) and therefore only slightly less than observed for grapes; Egypt and Algeria were the largest producers of dates.

In 2018, EU-27 production of apples and pears was 13.3 and 2.6 million tonnes respectively. Collectively, the ENP-South countries (2017 data for Egypt and Tunisia, 2016 data for Lebanon, no data available for Libya or Palestine) produced 2.5 and 0.4 million tonnes of apples and pears, equivalent to 18.6 % and 15.0 % of the EU-27 harvest. Egypt and Morocco were the largest producers of apples while Algeria was the largest producer of pears.

For fresh vegetables, EU-27 production in 2018 was 59.8 million tonnes. Among the five ENP-South countries for which data are available (see Table 7.3) Egypt (2017 data), Algeria and Morocco had by far the highest levels of production.

Table 7.3: Crop production, 2018
(thousand tonnes)

	Olives	Grapes	Dates	Apples	Pears	Fresh vegetables
EU-27	13 665	27 622	:	13 334	2 587	59 831
Algeria	861	503	1 095	488	200	13 657
Egypt (¹)	1 095	1 734	1 542	716	77	19 459
Israel	55	111	45	111	26	1 339
Jordan	125	60	26	21	2	1 823
Lebanon (²)	158	119	:	345	29	:
Libya	:	:	:	:	:	:
Morocco	1 561	451	112	697	35	7 768
Palestine	:	:	:	:	:	:
Tunisia (¹)	520	183	260	98	20	:

(¹) 2017.

(²) 2016.

Source: Eurostat (online data code: [apro_cpsh1](#))



Animals and animal products

While the farming of livestock in the ENP-South countries is shaped by climatic and topographic conditions, cultural and religious traditions also affect the types of animals that are reared. Many subsistence farmers in the ENP-South countries keep a small number of animals on their farm which may be used for eggs, milk, wool/hides, as well as for their meat.

The population of sheep and goats in most of the ENP-South countries was relatively high (compared with the EU; see Table 7.4). This may, at least in part, be linked to the ability of these animals to survive in arid conditions (whereas the ideal conditions for rearing cattle include a plentiful supply of pasture). Pig farming is almost non-existent in ENP-South countries, reflecting the religious practices of their majority Muslim or Jewish populations.

Table 7.4 provides an analysis of farm animals for the EU-27 and the ENP-South countries in December 2018. There was a considerable difference in the number of cattle raised in the EU-27 and the ENP-South countries; the total number of cattle across the ENP-South countries for which data are available (December 2017 data for Algeria and Egypt, April 2017 data for Tunisia and December 2016 data for Lebanon (no data for Libya or Palestine) equated to just 14 % of the total in the EU-27. Data availability for the ENP-South countries is similar for sheep and goats: based on the information shown in Table 7.4 there were around 64 million sheep in the ENP-South countries and over 17 million goats. As such, the number of sheep was similar to the total across the EU-27 whereas there were at least two fifths more goats in the ENP-South countries than in the EU-27.

Table 7.4: Livestock population, December 2018
(thousand heads)

	Cattle		Sheep	Goats
	Total	Dairy cows		
EU-27 ⁽¹⁾	77 790	21 025	63 000	12 200
Algeria ⁽²⁾	1 895	972	28 394	5 008
Egypt ⁽²⁾	4 387	:	5 305	3 974
Israel	546	119	460	84
Jordan	76	44	3 060	742
Lebanon ⁽³⁾	86	53	429	499
Libya	:	:	:	:
Morocco	3 441	:	19 880	5 732
Palestine	:	:	:	:
Tunisia ⁽⁴⁾	646	437	6 406	1 185

⁽¹⁾ Sheep and goats: rounded estimates (based on available national data) made for the purpose of this publication.

⁽²⁾ 2016.

⁽³⁾ April 2017.

⁽⁴⁾ 2017.

Source: Eurostat (online data codes: [apro_mt_lscat](#), [apro_mt_lssheep](#) and [apro_mt_lsgoat](#))

The structure of animal output — as measured by the quantity of slaughtered production — differs from the structure of the animal populations, in large part due to the fact that a proportion of cattle, sheep and goats are reared for milk rather than for meat. In all of the ENP-South countries for which data are available (see Table 7.5), poultry accounted for the highest quantity of slaughtered production in the most recent year for which data

are available. In most ENP-South countries, the second highest level of production was for meat from bovines, although in Lebanon (2016 data) the production of meat from sheep was greater. Data for Algeria are incomplete (no data for meat from goats or poultry), but in 2017 the level of meat production from sheep was considerably greater than that from bovines.

Table 7.5: Meat production, 2018
(thousand tonnes)

	Bovines	Sheep	Goats	Poultry
EU-27 ⁽¹⁾	7 009	435	45	12 040
Algeria ⁽²⁾	1 663	3 251	:	:
Egypt ⁽²⁾	755	62	33	1 303
Israel	117	35	3	650
Jordan ⁽³⁾⁽³⁾	31	16	10	209
Lebanon ⁽³⁾⁽⁴⁾	7	8	6	125
Libya	:	:	:	:
Morocco	261	180	30	720
Palestine	:	:	:	:
Tunisia ⁽⁵⁾	58	50	9	220

⁽¹⁾ Meat from sheep, goats and poultry: rounded estimates (based on available national data) made for the purpose of this publication. Sheep: excluding Bulgaria. Goats: excluding Bulgaria and Croatia. Poultry: excluding Estonia, the Netherlands and Austria.

⁽²⁾ 2017.

⁽³⁾ Poultry: meat from broilers.

⁽⁴⁾ 2016.

⁽⁵⁾ 2015.

Source: Eurostat (online data code: [apro_mt_pann](#))



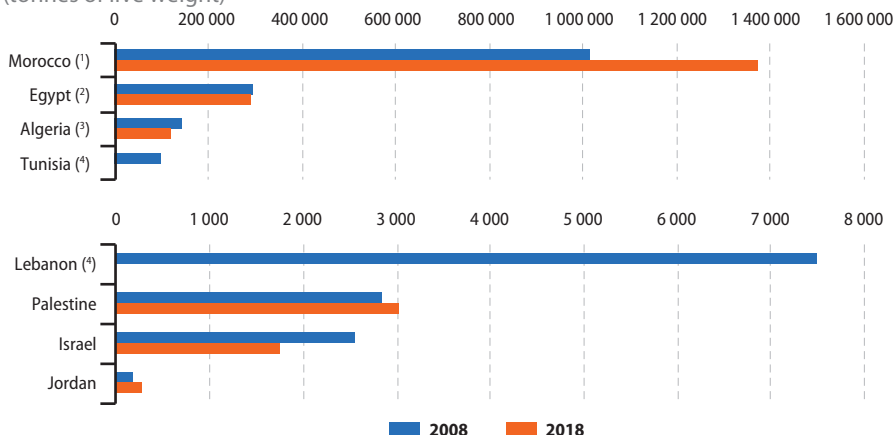
Fisheries

The weight of the annual fish catch is shown in Figure 7.4: note that this excludes fish farming (aquaculture). The fish catch recorded for the EU-27 in 2018 was 4.4 million tonnes. The largest fish catch among the ENP-South countries was 1.4 million tonnes, observed in Morocco, equivalent to 30.9 % of the EU-27 total. This was 4.7 times as high as the next highest catch, 293 thousand tonnes in Egypt in 2017. Algeria was the only other country to record a catch in excess of 100 thousand tonnes (2018 data), although older data for Tunisia indicate a level around this order of magnitude.

Between 2008 and 2018, the fish catch increased substantially in Morocco, up 355 thousand tonnes, an increase of 34.9 %. A larger increase in relative terms (up 52.7 %) was observed in Jordan — which has a very short coast line — although the actual increase was just 91 tonnes. A small increase was recorded for Palestine, up 5.9 % between 2008 and 2018 while the fish catch in Egypt was also similar in 2017 to what it had been in 2008 (down 0.3 %). Larger falls between 2008 and 2018 were observed in Algeria (down 15.3 %) and in Israel (down 31.6 %).

Figure 7.4: Annual maritime catch of fish, 2008 and 2018

(tonnes of live weight)



Note: EU-27, 4.4 million tonnes in 2015; Libya: not available. The scale used on the x-axis is different in the two parts of the figure. Excludes catches from inland waters and aquaculture.

⁽¹⁾ 2018: provisional.

⁽²⁾ 2017 instead of 2018.

⁽³⁾ Including aquaculture and recreational fishing.

⁽⁴⁾ 2018: not available.

⁽⁵⁾ Estimates.

Source: Eurostat (online data code: [fish_ca_main](#)) and the Food and Agriculture Organisation of the United Nations

8

Tourism



Bed places

The number of bed places available in hotels and similar establishments provides one measure of a country's capacity to attract tourists; note that official tourism statistics include business travellers as tourists alongside individuals travelling for pleasure or other reasons. In 2018, the ENP-South countries had a combined total of 1.0 million bed places (2016 data for Egypt and Tunisia, no recent data available for Jordan, Lebanon or Libya). By comparison, there were 12.1 million bed places in hotels and similar accommodation in the EU-27 in 2018.

Among the ENP-South countries, Morocco (2018 data), Tunisia and Egypt (both 2016 data) had the highest number of bed places in hotels and similar accommodation, with between 202 000 and 261 000 each. In Israel and Algeria there were over 100 000 bed places each in 2018.

The lowest level of capacity was recorded for Palestine, with 16 000 bed places available in 2018 (see Table 8.1).

In Egypt, the total number of bed places was 24 % lower in 2016 than it had been in 2008. The only other ENP-South country to report a fall was Tunisia, where bed capacity was just 1 % lower in 2016 than in 2008. Elsewhere the number of bed places increased between 2008 and 2018. In Israel, there was a small decline in bed capacity in the early years of the period studied, followed by an upswing resulting in overall growth of 17 %. In Algeria there was a fairly regular, moderate upwards development, with overall growth of 39 %, while in Palestine and Morocco there were also regular, but stronger increases, up 68 % and 71 % respectively. For comparison, the number of bed places in hotels and similar accommodation in the EU-27 increased overall by 12 % between 2008 and 2018.

Table 8.1: Key indicators for hotels and similar accommodation 2008 and 2018
(thousands)

	Bed places		Total arrivals		Arrivals of non-residents		Nights spent	
	2008	2018	2008	2018	2008	2018	2008	2018
EU-27	10 887	12 144	543 183	732 691	206 852	306 924	1 429 087	1 800 188
Algeria	86	119	3 168	4 527	253	954	5 347	7 536
Egypt ⁽¹⁾	267	202	15 137	7 134	:	:	54 112	22 119
Israel ⁽²⁾	116	136	8 173	10 540	3 373	4 134	21 596	25 157
Jordan	:	:	:	:	:	:	:	:
Lebanon ⁽³⁾	32	:	635	815	476	702	1 452	2 534
Libya ⁽⁴⁾	28	:	:	:	:	:	201	:
Morocco	153	261	5 412	8 606	3 824	5 359	16 462	23 954
Palestine ⁽⁵⁾	10	16	446	654	387	606	1 127	1 834
Tunisia ⁽⁶⁾	238	235	6 916	4 588	5 603	2 284	38 112	17 880

(1) 2016 instead of 2018.

(2) Bed places: includes places in temporarily closed hotels.

(3) 2016 instead of 2018. Bed places: 2010 instead of 2008. Arrivals and nights spent: all tourism accommodation establishments.

(4) Nights spent: 2009 instead of 2008.

(5) West Bank only. Bed places: refers to beds which are ready for use during the reference period; rooms closed for maintenance or repairs are excluded.

(6) Bed places: includes also bed places in specialised establishments and campsites. 2016 instead of 2018.

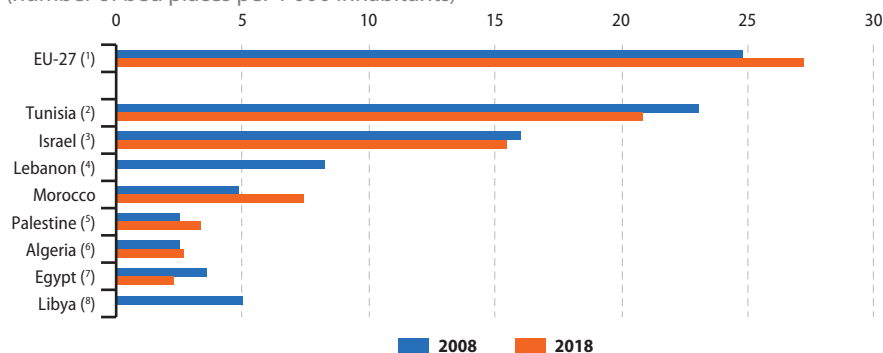
Source: Eurostat (online data codes: *tour_cap_nat*, *tour_occ_arnat* and *tour_occ_nihat*)



Figure 8.1 presents another measure for analysing the number of bed places in hotels and similar accommodation, providing information in relation to the size of the national population. The EU-27 recorded a higher capacity of bed places than any of the ENP-South countries, with an average of 27 bed places in hotels and similar accommodation per 1 000 inhabitants in 2018. Tunisia came closest to the EU-27 average, with 21 bed places in hotels and similar accommodation per 1 000 inhabitants in 2016, reflecting the importance of tourism to the Tunisian economy; note that this value includes also bed places in specialised establishments and

campsites. In Israel, the capacity of bed places was a little over half the level in the EU-27, while in Morocco it was about one quarter of the EU-27 level. Despite the increase in the number of bed places in all except two (Tunisia and Egypt) of the ENP-South countries in terms of absolute figures, in three countries (Egypt, Tunisia and Israel) the capacity of bed places available per 1 000 inhabitants decreased during the period shown in Figure 8.1, as population growth outstripped any increase in bed places (note again that the data for Jordan refer to the number of rooms).

Figure 8.1: Capacity of bed places in hotels and similar accommodation, 2008 and 2018
(number of bed places per 1 000 inhabitants)



Note: Jordan, not available.

(1) Break in series. 2018: estimate.

(2) Includes also bed places in specialised establishments and campsites. 2016 instead of 2018.

(3) Includes bed places in temporarily closed hotels.

(4) 2007 instead of 2008. 2018: not available.

(5) Refers to beds which are ready for use during the reference period; rooms closed for maintenance or repairs are excluded. 2018: West Bank only.

(6) 2017 instead of 2018.

(7) 2016 instead of 2018.

(8) 2018: not available.

Source: Eurostat (online data codes: *tour_cap_nat* and *demo_pjan*)

Arrivals

In 2018, there were 732.7 million arrivals at hotels and similar accommodation in the EU-27, an increase of 34.9 % compared with 2008.

This can be compared with the 2018 total for the ENP-South countries (2016 data for Egypt, Lebanon and Tunisia, no data available for Jordan or Libya), where there were 36.9 million arrivals. The largest number of arrivals in hotels and similar accommodation across the ENP-South countries in 2018 or the most recent year (see Table 8.1 for data availability) was recorded by Israel, with 10.5 million arrivals. Morocco had the second largest number of arrivals among ENP-South countries, 8.6 million in 2018, while Egypt recorded 7.1 million arrivals in 2016, Tunisia 4.6 million in 2016 and Algeria 4.5 million in 2018.

Focusing on arrivals of non-residents, the largest number of international arrivals in hotels and similar accommodation across the ENP-South countries in 2018 was recorded by Morocco (see Table 8.1), with 5.4 million arrivals. Israel had the second largest number of arrivals among ENP-South countries, 4.1 million, while Tunisia recorded 2.3 million arrivals in 2016. Note that no recent data are available for Egypt, Jordan or Libya. Between 2008 and 2018, Algeria recorded a large increase in non-resident arrivals at hotels and similar accommodation, the number in 2018

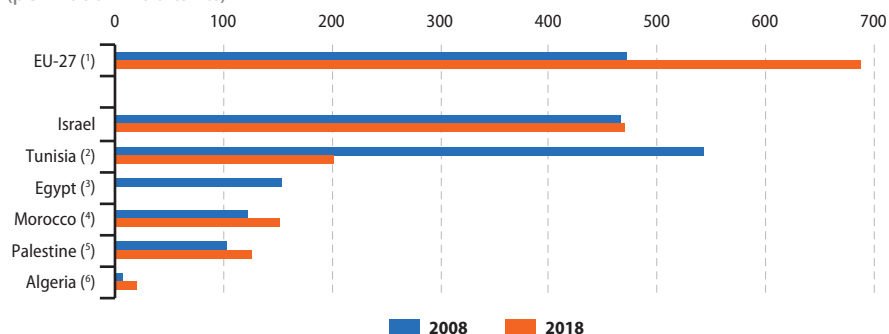
was 3.8 times as high as the number in 2008. Palestine (up 57 %), Lebanon (up 47 % between 2008 and 2016), Morocco (up 40 %) and Israel (up 23 %) also recorded increases, while the number of international arrivals in Tunisia fell by 59 % between 2008 and 2016.

Figure 8.2 shows the number of arrivals of non-residents at hotels and similar accommodation relative to the number of (resident) inhabitants. In the EU-27 there were 688 arrivals of non-residents per 1 000 inhabitants in 2018, an overall increase of 46 % when compared with the same ratio for 2008.

Among the ENP-South countries, the ratio of non-resident arrivals in hotels and similar accommodation to population was systematically lower than in the EU-27. The highest values were recorded for Israel and Tunisia (2016 data), with 470 and 202 non-resident arrivals per 1 000 inhabitants respectively. The ratio of non-resident arrivals to the number of inhabitants for Morocco was just over one fifth of the ratio in the EU-27, just below one fifth for Palestine, and much lower still in Algeria (2017 data). However, although the ratio remained low, the number of non-resident arrivals relative to population increased in percentage terms at a much faster pace in Algeria (2008-2017) than it did in the EU-27, while the ratio more than halved in Tunisia (2008-2016).



Figure 8.2: Arrivals of non-residents in hotels and similar accommodation relative to resident population, 2008 and 2018
(per 1 000 inhabitants)



Note: Jordan, Lebanon and Libya, not available.

⁽¹⁾ Estimates.

⁽²⁾ 2016 instead of 2018.

⁽³⁾ 2009 instead of 2008. 2018: not available.

⁽⁴⁾ Provisional.

⁽⁵⁾ 2018: West Bank only.

⁽⁶⁾ 2017 instead of 2018.

Source: Eurostat (online data codes: [tour_occ_arnat](#) and [demo_pjan](#))

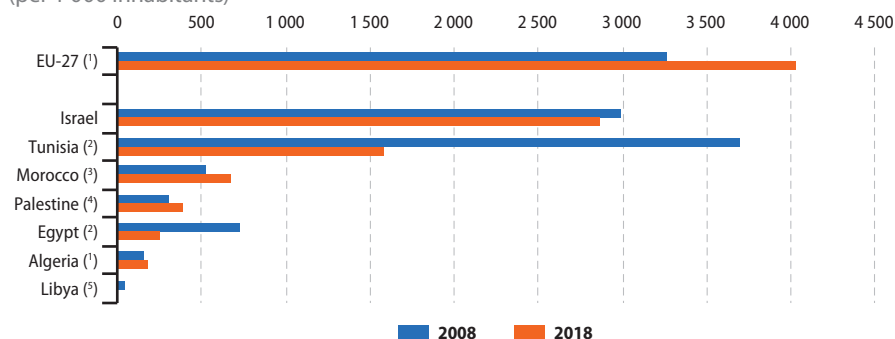
Nights spent

The final indicator shown in Table 8.1 concerns the number of nights spent in hotels and similar accommodation. In 2018, there were 1.8 billion nights spent in hotels and similar accommodation in the EU-27, this was equivalent to an overall increase of 10.0 % compared with 2008. Data are available for seven ENP-South countries (not for Jordan or Libya), where a total of 101 million nights were spent in hotels and similar accommodation in 2018 (2016 data for Egypt, Lebanon and Tunisia), down 26.9 % compared with 2008. Israel, Morocco and Egypt (2016 data) all registered in excess of 20 million nights spent in hotels and similar accommodation.

Figure 8.3 presents this information on nights spent in hotels and similar accommodation relative to the size of the population. Whereas there were 4 035 nights spent in hotels and similar establishments per 1 000 inhabitants in the EU-27 in 2018, the ratio was much lower in most of the ENP-South countries. The highest ratio was 2 859 per 1 000 inhabitants recorded for Israel in 2018, followed by 1 582 per 1 000 inhabitants recorded for Tunisia in 2016. Four other ENP-South countries have recent data, all with ratios below 1 000 nights per 1 000 inhabitants, ranging from 680 per 1 000 inhabitants in Morocco to 179 per 1 000 inhabitants in Algeria.

Figure 8.3: Nights spent in hotels and similar accommodation relative to population size, 2008 and 2018

(per 1 000 inhabitants)



Note: Jordan and Lebanon, not available.

⁽¹⁾ 2018: estimate.

⁽²⁾ 2016 instead of 2018.

⁽³⁾ Provisional.

⁽⁴⁾ 2018: West Bank only.

⁽⁵⁾ 2009 instead of 2008. 2018: not available.

Source: Eurostat (online data codes: [tour_occ_ninat](#) and [demo_pjan](#))



Outbound tourism

The final section in this chapter details the outward flow of tourists travelling abroad. Tourists from the EU-27 made 284 million non-domestic trips in 2017; note that EU-27 data for this particular indicator only refer to persons aged 15 years and over.

Among the ENP-South countries for which data are available, the highest number of outbound trips taken by tourists was recorded for Egypt at 11.0 million in 2018, while there were 8.5 million outbound trips made by tourists from Israel, ahead of Algeria with 5.6 million (see Table 8.2).

Algeria recorded the strongest overall growth in the number of outbound tourist trips between 2013 and 2018, with its number more than doubling during this five-year period. In Israel the number of trips increased overall by 78 % between 2013 and 2018. The number of trips taken from Lebanon in 2017 was 30 % higher than in 2013 while in Egypt the increase between 2013 and 2018 was 20 % and in Jordan it was

11 %. For comparison, the number of trips taken from the EU-27 rose by 16 % between 2014 and 2017 (note there is a break in series and that data only refer to persons aged 15 years and over).

Table 8.2 also presents the number of outbound trips taken by tourists relative to the size of the population. In the EU-27 there were, on average, 636 trips per 1 000 inhabitants in 2017; note that these figures for tourist trips relate to persons aged 15 and over while the ratio is calculated relative to the total population.

Among the ENP-South countries, Israel recorded the highest ratio of outbound trips relative to population size, at 963 trips per 1 000 inhabitants in 2018 and was the only ENP-South country (for which recent data are available) to record a ratio above the EU-27 average; note that older data also show a relatively high ratio for Lebanon. The second highest ratio in recent years was 149 trips per 1 000 inhabitants for Jordan in 2018, ahead of Algeria (2017 data) and Egypt; all three of these countries' ratios were less than one quarter of the EU-27 average.

Table 8.2: Number of trips taken by outbound tourists, 2013 and 2018

	Number of trips (thousands)		Number of trips relative to population size (number per 1 000 inhabitants)	
	2013	2018	2013	2018
EU-27 ⁽¹⁾	243 826	283 546	551	636
Algeria ⁽²⁾	2 136	5 610	56	123
Egypt	9 148	10 968	109	114
Israel	4 757	8 473	596	963
Jordan	1 356	1 501	183	149
Lebanon ⁽³⁾	2 317	3 017	607	:
Libya	:	:	:	:
Morocco	:	:	:	:
Palestine	:	:	:	:
Tunisia	:	:	:	:

⁽¹⁾ Persons aged 15 years and over. 2014 instead of 2013. 2017 instead of 2018. Break in series.

⁽²⁾ Number of trips relative to population size: 2017 instead of 2018.

⁽³⁾ 2017 instead of 2018. Number of trips relative to population size: 2012 instead of 2013.

Source: Eurostat (online data codes: [tour_dem_tttot](#) and [demo_pjan](#))

9

Communications and transport



Telecommunications

Information and communication technologies affect people's everyday lives in many ways, both at work and in the home, for example, when communicating or buying goods or services online. This chapter looks at the access to and use of some of these technologies in the European Union (EU) and the ENP-South countries.

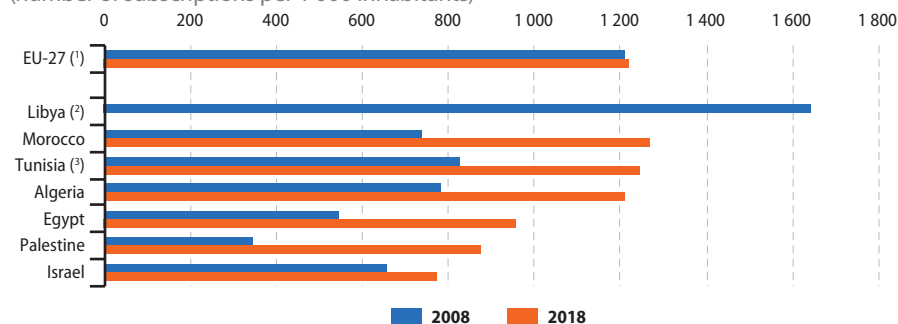
In the EU-27 there were, on average, 1 220 mobile phone subscriptions per 1 000 inhabitants in 2018; in other words, there was an average of 1.2 mobile subscriptions per person. From the late 1980s and early 1990s onwards the number of subscriptions increased rapidly as mobile phones became commonplace. From Figure 9.1 it can be seen that within the EU-27 the growth has become much more subdued, only slight exceeding population growth between 2008 and 2018: the mobile penetration rate in the EU-27 was about 1 % higher in 2018 than it had been in 2008.

Over the period 2008-2018, the rate of growth of the mobile penetration rate was faster in each of the ENP-South countries for which data are available. The fastest growth was in Palestine where the rate in 2018 was 2.5 times as high as it had been in 2008. In most of the other countries the rate increased by at least 50 %, the one exception being Israel where it increased by 18 % between 2008 and 2018.

In 2018, the number of mobile phone subscriptions was higher than the number of inhabitants in Morocco, Tunisia (2017 data) and Algeria, while the lowest penetration rate was in Israel, 772 subscriptions per 1 000 inhabitants. Such high rates indicate that some people had more than one mobile subscription: this could result from some subscriptions remaining active even when they were no longer in use, or may be linked to some people having subscriptions for work and private use or because they owned several connected devices.

Figure 9.1: Mobile phone penetration, 2008 and 2018

(number of subscriptions per 1 000 inhabitants)



Note: Jordan and Lebanon, not available.

⁽¹⁾ Rounded estimates made for the purpose of this publication.

⁽²⁾ 2010 instead of 2008.

⁽³⁾ 2017 instead of 2018.

Source: Eurostat (online data code: [demo_pjan](#)) and the International Telecommunication Union



Figure 9.2 presents information in relation to the number of fixed telephone lines per 1 000 inhabitants. Fixed telephone lines are those which connect a customer's equipment (such as a telephone handset, fax machine or modem) to the public switched telephone network (PSTN). This indicator, together with that for mobile telephony, is one of the broadest and most common measures used to evaluate the development of telecommunications.

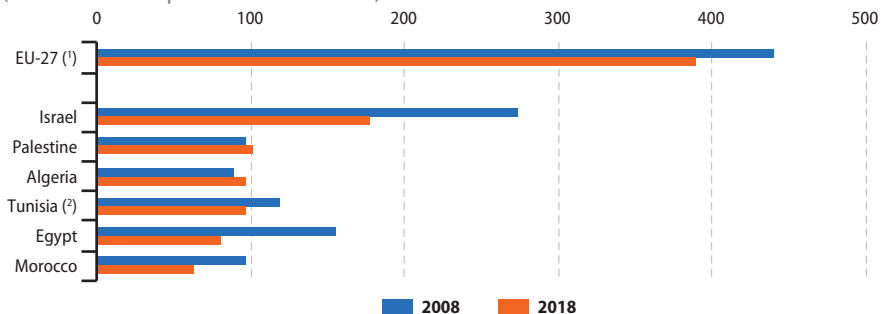
In the EU-27 there were, on average, 390 fixed telephone lines per 1 000 inhabitants in 2018. This figure was below the ratio recorded in 2008, when there had been, on average, 440 lines per 1 000 inhabitants.

There was also a reduction between 2008 and 2018 in the number of fixed telephone lines per 1 000 inhabitants in four of the six ENP-South

countries for which data are available (no data for Jordan or Lebanon and no recent data for Libya). In Egypt this ratio fell from 156 to 80 per 1 000 inhabitants, down 49 %, while in Morocco, Israel and Tunisia (2008-2017) it fell 36 %, 35 % and 19 % respectively. By contrast, there were increases between 2008 and 2018 in the number of fixed telephone lines per 1 000 inhabitants in Palestine (up 5 %) and Algeria (up 10 %).

Despite the fall in the fixed telephone line penetration rate in Israel, it still had the highest rate (177 lines per 1 000 inhabitants) in 2018 among all of the ENP-South countries for which data are available, although the gap to Palestine — with the second highest rate (101 lines per 1 000 inhabitants) — had narrowed somewhat. Algeria (98 per 1 000 inhabitants) and Tunisia (97 per 1 000 inhabitants; 2017 data) had rates that were only marginally lower than that in Palestine.

Figure 9.2: Fixed telephone line penetration, 2008 and 2018
(number of lines per 1 000 inhabitants)



Note: Jordan, Lebanon and Libya, not available.

⁽¹⁾ Rounded estimates made for the purpose of this publication.

⁽²⁾ 2017 instead of 2018.

Source: Eurostat (online data code: [demo_pjan](#)) and the International Telecommunication Union

Road and rail networks

There are considerable variations between the ENP-South countries as regards their total (land) area, geography and population numbers and so it is unsurprising to find wide ranging differences in levels of road and rail infrastructure; the same is true within the EU. Table 9.1 provides some basic information on the length of motorway, road and rail networks, measured in kilometres (km).

Based on the latest available information (no recent data for Libya), the ENP-South countries together had a combined road network that was approximately one tenth of the length of the EU-27 network. The longest road network among the ENP-South countries was recorded in Egypt (177 thousand km in 2017) while the shortest was in Palestine (3.4 thousand km).

Many areas in the ENP-South countries are very sparsely populated and this may, at least to

some degree, explain the relatively low level of development of motorway infrastructure. The longest motorway network in the ENP-South countries was recorded in Morocco (1.8 thousand km in 2017), while the next longest motorway network was reported in Algeria (1 132 km in 2018).

Capacity is one aspect which may constrain the expansion of rail transport, either in terms of the number/length of railway lines, or the stock of vehicles that are available to transport people and goods. Combining the length of the rail networks in the ENP-South (no data for Libya) countries gives a total equivalent to 8.8 % of the EU-27 network in 2017. As for roads, by far the longest rail network among the ENP-South countries was in Egypt, where there were 7.1 thousand km of railway lines. Algeria had the next largest rail network (4.4 thousand km), around three fifths the length of that in Egypt. Lebanon and Palestine had no operating railway lines.

Table 9.1: Length of road and rail networks, 2008 and 2018

(km)

	Motorways		Road network		Railway lines	
	2008	2018	2008	2018	2008	2018
EU-27 ⁽¹⁾	<i>64 200</i>	<i>73 600</i>	:	<i>4 017 000</i>	<i>204 400</i>	<i>201 300</i>
Algeria	167	1 132	111 428	129 474	3 572	4 440
Egypt ⁽²⁾	194	:	:	176 927	5 138	7 082
Israel ⁽³⁾	379	622	18 105	19 758	989	1 462
Jordan	0	0	7 816	7 498	622	622
Lebanon	300	300	6 850	6 850	–	–
Libya ⁽⁴⁾	:	:	15 143	:	:	:
Morocco ⁽²⁾	866	1 800	58 015	57 334	1 907	2 295
Palestine ⁽⁵⁾	:	:	:	3 400	–	–
Tunisia ⁽⁶⁾	360	407	19 371	19 546	1 991	1 777

⁽¹⁾ 2017 instead of 2018. Rounded estimates based on the closest reference period available for each EU Member State.

⁽²⁾ Motorways and road network: 2017 instead of 2018.

⁽³⁾ Road network: paved roads.

⁽⁴⁾ 2009 instead of 2008.

⁽⁵⁾ Excluding the Gaza strip.

⁽⁶⁾ Motorways and road network: 2016 instead of 2018. Railway lines: includes also lines no longer in use.

Source: Eurostat (online data codes: [road_if_motorwa](#), [road_if_roadsc](#) and [rail_if_line_tr](#))



Table 9.2 provides a complementary analysis of road and rail networks, comparing the size of these networks with the land area and with the population of each country.

In 2018, the density of roads in the EU-27 was 979 metres (m) or 0.979 km for every square kilometre (km²) of land. This value was slightly more than the road density in Israel (913 m per km²), which had the highest road density among the three ENP-South countries for which recent data are available. Palestine recorded a density of 564 m per km² while the lowest road density was 84 m per km² in Jordan.

Relative to the total number of inhabitants in each country, the length of the road network in Algeria (3.1 km per 1 000 inhabitants in 2017) was around one third of the comparable value in the EU-27 (9.0 km per 1 000 inhabitants in 2017). This measure — the length of roads relative

to the size of the population — showed less differences between the ENP-South countries than the measure for road density based on land area. For example, the length of the road network relative to population size was 4.4 times as high in Algeria (the highest ratio) as it was in Palestine (the lowest ratio), whereas for road density based on land area the ratio for Israel (the highest ratio) was 10.8 times as high as the ratio for Jordan (the lowest ratio).

Aside from Lebanon and Palestine that have no railway, the lowest ratios of the length of the rail network relative to population size were 0.06 km per 1 000 inhabitants in Jordan and 0.07 km per 1 000 inhabitants in Morocco and Egypt, while the highest was 0.17 km per 1 000 inhabitants in Israel. As such, this ratio was quite similar across the ENP-South countries, being 2.7 times as high in Israel as it was in Jordan.

Table 9.2: Density of transport networks, 2018

	Roads (including motorways)		Railway lines	
	(m per km ² land area)	(km per 1 000 inhabitants)	(m per km ² land area)	(km per 1 000 inhabitants)
EU-27 ⁽¹⁾	979	9.0	49	0.45
Algeria ⁽²⁾	:	3.1	:	0.11
Egypt ⁽³⁾	:	1.9	:	0.07
Israel	913	2.2	68	0.17
Jordan	84	0.7	7	0.06
Lebanon	:	:	–	–
Libya	:	:	:	:
Morocco ⁽²⁾	:	1.6	:	0.07
Palestine	564	0.7	–	–
Tunisia ⁽⁴⁾	:	1.7	:	0.15

⁽¹⁾ 2017. Rounded estimates based on the closest reference period available for each EU Member State.

⁽²⁾ 2017.

⁽³⁾ Roads: 2017

⁽⁴⁾ Roads: 2016

Source: Eurostat (online data codes: [road_if_motorwa](#), [rail_if_line_tr](#), [reg_area3](#) and [demo_gind](#))

Rail transport

Table 9.3 presents a set of indicators for analysing rail passenger and rail freight developments. The data are presented in numbers of passengers and tonnes of freight, as well as in passenger-kilometres and tonne-kilometres which reflect not only the number of passengers and quantity of freight but also the distance they are transported. Among the ENP-South countries two — Lebanon and Palestine — have no operating rail lines and therefore no rail traffic.

There were 426 million passengers carried on the rail networks of six ENP-South countries in 2018 (no data for Libya). Between 2008 and 2018 the number of rail passengers nearly doubled in Israel (up 93 %), while there was also a considerable increase in passenger numbers in Algeria (up 60 %) and Jordan (up 57 %). By contrast, the number of rail passengers in Egypt fell by more than two fifths (down 45 % or 196 million passengers) between 2008 and 2018.

On the basis of passenger-kilometres there was confirmation that the extent of rail passenger transport continued to grow during the period 2008-2018 in Jordan (although the level of rail passenger transport remained very small), Algeria (up 71 %), Israel (up 54 %) and Morocco (up 17 %). By contrast, when measured in passenger-kilometres rather than simply in terms of the number of

passengers, rail passenger transport in Tunisia declined between 2008 and 2018 as it did in Egypt.

Rail freight services provide an alternative to road freight transport and are generally considered as more environmentally friendly. However, rail services may be constrained by the extent to which the rail network covers a country. Within the EU-27 there was a reduction in rail freight during the period from 2008 to 2018 (note that the figures for 2018 for the EU-27 exclude Belgium). The quantity of rail freight also fell in the majority of ENP-South countries between 2008 and 2018, with only Israel (among those for which data are available and/or have rail networks) expanding its level of freight with a relative increase of some 23 % during the period under consideration. By contrast, the largest reductions in rail freight were recorded for Tunisia, where the weight of freight carried by rail fell by more than two thirds (down 71 %) and in Jordan where rail freight services ceased (at least temporarily) in 2018.

For rail freight transport, the analysis based on tonne-kilometres reflects the analysis based on tonnes, as lower values were reported in 2018 than in 2008 in all but one of the ENP-South countries (for which data are available), the exception being Israel (up 17 %). The largest contractions in the quantity of rail freight — measured in tonne-km — were recorded in Tunisia, down 74 % and Jordan (where operations ceased, as noted above).

**Table 9.3: Main indicators for rail transport, 2008 and 2018**

	Rail passengers				Rail freight			
	(thousands)		(million passenger-kilometres)		(thousand tonnes)		(million tonne-kilometres)	
	2008	2018	2008	2018	2008	2018	2008	2018
EU-27⁽¹⁾	:	7 407 921	:	365 235	1 693 726	1 554 377	421 675	416 550
Algeria	24 744	39 536	937	1 601	6 901	4 422	1 562	1 026
Egypt	440 026	244 135	56 303	33 615	8 001	4 570	2 701	1 395
Israel	35 136	67 696	1 968	3 032	6 837	8 404	1 056	1 235
Jordan ⁽²⁾	13	20	0	1	2 556	0	449	0
Lebanon	–	–	–	–	–	–	–	–
Libya	:	:	:	:	:	:	:	:
Morocco	27 527	35 000	3 820	4 475	31 703	26 805	4 986	3 485
Palestine	–	–	–	–	–	–	–	–
Tunisia	39 226	39 986	1 494	1 109	10 528	3 103	2 073	535

(¹) Rail passengers: excluding Belgium, Hungary and the Netherlands; 2017 data for Poland.
 Rail freight: 2018 excluding Belgium.

(²) The operation of rail freight ceased in 2018.

Source: Eurostat (online data codes: [rail_pa_total](#) and [rail_go_total](#))

Air transport

There has been a considerable expansion in air services in recent decades, both in terms of passenger numbers and freight carried. Although there has been rapid growth, it is worth noting that the weight of goods carried by air remains relatively low, given the high cost of this mode of transport (for example, when compared with maritime freight) especially for bulky items. Among the ENP-South countries one — Palestine — has no operating airport and therefore no air traffic.

Table 9.4 concerns national and international air transport, distinguishing between passengers and freight and also between arrivals and departures. Within the EU-27, the number of air passenger arrivals in 2018 was 728.3 million, with the same number of departures, giving a total number of 1.5 billion arrivals and departures. These numbers were far higher than in the ENP-South countries, where the combined number of arrivals and departures for all ENP-South countries together was 115.2 million (including 2016 data for Egypt; no data available

Table 9.4: Main indicators for air transport, 2008 and 2018

	Passengers carried (millions)				Freight and mail (thousand tonnes)			
	Arrivals		Departures		Arrivals		Departures	
	2008	2018	2008	2018	2008	2018	2008	2018
EU-27	516.8	728.3	518.3	728.3	6 470.6	7 608.2	6 165.4	8 182.6
Algeria	4.0	7.3	3.7	7.3	25.2	32.7	0.0	10.5
Egypt ⁽¹⁾	17.7	13.5	18.1	13.7	114.0	113.4	177.0	224.8
Israel	5.6	11.3	5.6	11.3	144.0	200.7	185.0	148.5
Jordan	2.4	4.3	2.4	4.3	48.7	64.1	42.3	44.1
Lebanon	2.0	4.4	2.0	4.4	36.8	58.3	31.8	39.9
Libya	:	:	:	:	:	:	:	:
Morocco ⁽²⁾	6.3	11.2	6.4	11.4	32.1	:	35.8	:
Palestine	—	—	—	—	—	—	—	—
Tunisia	5.5	5.4	5.6	5.5	10.9	17.2	9.7	18.0

⁽¹⁾ 2016 instead of 2018.

⁽²⁾ Freight and mail: 2007 instead of 2008.

Source: Eurostat (online data codes: [avia_paoc](#) and [avia_gooc](#))



for Libya). With the exception of Tunisian and Egyptian (2008-2016) passenger transport, there was growth between 2008 and 2018 in air passenger numbers for each of the ENP-South countries (for which data are available). Lebanon and Israel recorded the highest growth rates, as their number of air passenger arrivals more than doubled over the period under consideration. Developments in air passenger numbers over the period 2008-2018 hide, to some degree, the effects of the Arab spring and associated uncertainties in 2011 and thereafter, which resulted in a rapid decline in air passenger arrivals, which was particularly marked in Egypt and Tunisia. In Egypt, annual air passenger numbers fell by 10.0 % between 2008 and 2013 and by a further 15.1 % between 2013 and 2016.

Within the EU-27, the quantity of air freight and mail arrivals in 2018 was 7.6 million tonnes, with a slightly higher quantity (8.2 million tonnes) of departures. Among the ENP-South countries the quantity of air freight and mail arrivals was

highest in Israel, reaching 201 thousand tonnes in 2018; Egypt recorded the second highest quantity of air freight and mail, at 113 thousand tonnes in 2016. For departures the situation was reversed with Egypt recording the highest value (225 thousand tonnes in 2016) ahead of Israel (149 thousand tonnes in 2018). Consequently Egypt recorded a much greater quantity of outward rather than inward freight and mail. In Tunisia, the quantities of inward and outward freight and mail were quite similar to each other while in Algeria, Lebanon, Jordan and Israel a greater quantity of inward rather than outward freight and mail was recorded. Between 2008 and 2018 (2016 for Egypt), the quantity of air freight and mail arrivals increased in each of the ENP-South countries for which data are available, except for Egypt where it fell marginally. Growth rates for air freight and mail arrivals were usually less pronounced than for air passenger numbers, although the quantity of Lebanese and Tunisian air freight increased by more than 50 % between 2008 and 2018.

Sea transport

Table 9.5 presents a similar set of indicators for sea (maritime) transport, namely the number of passengers and weight of freight, distinguished between inwards (disembarked/unloaded) and outwards (embarked/loaded). Among the ENP-South countries, one — Palestine — has no operating major port and therefore insignificant sea traffic.

Within the EU-27, the number of inward sea passengers in 2018 was 205.8 million, with slightly fewer (204.4 million) outward passengers, giving a total number of 410.2 million passengers. By far the highest number

of passengers carried (based on inward movements) among the ENP-South countries was recorded in Morocco (2.6 million in 2018), due in part to its close proximity and ties to mainland Europe, while none of the remaining ENP-South countries received more than half a million inward passengers. Inward and outward movements of passengers were fairly balanced, with outward movements slightly exceeding inward movements in Egypt (2015 data), Morocco and Jordan, a balanced position in Israel, and more inward than outward movements recorded in Algeria and Tunisia. In relative terms the biggest differences were observed in Tunisia and Egypt.

Table 9.5: Main indicators for maritime transport, 2008 and 2018

	Passengers (excluding cruise passengers) (thousands)				Goods (gross weight in thousand tonnes)			
	Inwards		Outwards		Inwards		Outwards	
	2008	2018	2008	2018	2008	2018	2008	2018
EU-27	205 782	205 802	203 626	204 374	2 170 848	2 138 199	1 212 696	1 464 876
Algeria	366	395	361	366	33 968	44 155	94 276	74 771
Egypt (¹)	1 486	500	1 521	600	70 273	93 400	45 937	39 100
Israel (²)	150	84	150	84	22 856	38 500	18 132	20 200
Jordan	565	133	552	138	9 165	11 093	9 221	5 032
Lebanon (³)	3	5	:	:	5 867	7 055	1 194	930
Libya	:	:	:	:	:	:	:	:
Morocco (⁴)	:	2 577	:	2 590	:	60 963	:	38 984
Palestine	—	—	—	—	—	—	—	—
Tunisia	357	400	333	300	16 520	16 600	7 939	8 400

(¹) 2015 instead of 2018.

(²) 2018: includes freight loaded and unloaded offshore.

(³) Only covers Beirut port (which represents about 90 % of maritime transport in Lebanon).

(⁴) 2018: passengers, total number of passengers arriving or departing from ANP (national ports agency) and Tanger med; freight, imports to ANP (national ports agency), Tanger med and cabotage.

Source: Eurostat (online data codes: [mar_mp_aa_cphd](#) and [mar_mg_aa_cwhd](#))



Among the ENP-South countries, there was growth between 2008 and 2018 in the overall number of inward passengers carried by maritime services in Lebanon (note the data only refer to the port of Beirut), Tunisia and Algeria, while falls were observed in Jordan, Egypt (2008-2015) and Israel. In terms of outward passengers, all ENP-South countries for which data are available recorded a fall in numbers, except for Algeria. Looking at inward and outward passengers together, the largest falls were observed for Jordan, Egypt and Israel.

Sea freight transport is especially common for bulky, low value products. It is also particularly important for EU trade with non-member countries. The quantity of EU-27 inward sea freight in 2018 was 2.1 billion tonnes while outward freight was considerably smaller, at 1.5 billion tonnes. The latest information available for ENP-South countries shows that Egypt had the highest quantity of inward freight carried by sea, at 93 million tonnes in 2015, which was considerably more than the next highest quantities recorded for Morocco (61 million tonnes), Algeria (44 million tonnes) and Israel (39 million tonnes). Algeria reported a considerably greater quantity of outward rather than inward sea freight, some 75 million tonnes, which was the

largest amount among the ENP-South countries for which data are available. The remaining countries reported lower quantities of outward than inward sea freight. Egypt (39 million tonnes; 2015 data), Morocco (also 39 million tonnes) and Israel (20 million tonnes) reported the next largest quantities of outward freight.

Sea freight into the EU-27 decreased between 2008 and 2018 (down 1.5 %), whereas its outward freight increased (up 20.8 %). There was an increase in the weight of inward freight arriving by sea between 2008 and 2018 (or the most recent year available) in each of the ENP-South countries (for which data are available), although the increase in Tunisia was less than 1 %. Inward sea freight expanded at a particularly rapid pace in Israel where an increase of 68 % was recorded, while Egypt (2008-2015), Algeria, Jordan and Lebanon (again only for the port of Beirut) registered increases of 20-33 %. For outward freight the developments were more mixed. Israel again reported the largest increase, up 11 %, while Tunisia (up 6 %) had the only other increase. Egypt (2008-2015), Algeria and Lebanon recorded decreases in outward freight transport that were in the range of 15-22 %, while Jordan recorded the largest decrease of all (down 45 %).

Motorisation rate

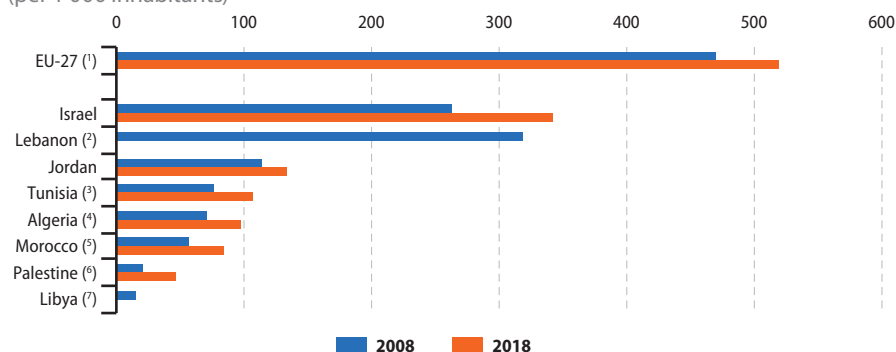
The final analysis of transport data looks at an indicator concerning equipment rates, namely the motorisation rate: this is calculated as a ratio of passenger cars to the number of inhabitants (see Figure 9.3). In the EU-27, this rate was just over one car for every two people, at 519 per 1 000 inhabitants in 2017. Israel had the highest motorisation rate among the ENP-South countries (subject to data availability), at 341 per 1 000 inhabitants in 2018. This was far more than the next highest motorisation rate among the ENP-South countries for which data are available (note that no recent data are available for Lebanon, but older data (for 2009) indicate a rate close to that of Israel): 133 per 1 000 inhabitants

in 2018 in Jordan. The lowest motorisation rate among the ENP-South countries was 46 per 1 000 inhabitants in Palestine in 2018 (note that this is an underestimate).

Between the years shown in Figure 9.3, the motorisation rate increased in the EU-27 and the six ENP-South countries for which data are available. In the EU-27, the rate increased overall by 10.4 % between 2008 and 2017, while in the ENP-South countries growth was higher. In Palestine, the rate increased by 132.7 % between 2008 and 2018, in other words it more than doubled. Elsewhere, the rate increased by an amount between 30.0 % and 51.0 % except in Jordan where growth was more subdued (up 17.3 %).

Figure 9.3: Motorisation rate — number of passenger cars relative to population size, 2008 and 2018

(per 1 000 inhabitants)



Note: Egypt, not available.

⁽¹⁾ 2008: including 2010 data for Portugal. 2017 instead of 2018; including 2016 data for Greece and Poland.

⁽²⁾ 2009 instead of 2008. 2018: not available.

⁽³⁾ 2016 instead of 2018.

⁽⁴⁾ 2017 instead of 2018.

⁽⁵⁾ 2018: provisional.

⁽⁶⁾ Underestimate: number of vehicles excluding the Gaza strip.

⁽⁷⁾ 2010 instead of 2008. 2018: not available.

Source: Eurostat (online data codes: [tran_r_vehst](#) and [demo_gind](#))

10

Energy



This chapter presents information on energy within the ENP-South countries and the European Union (EU). Included are data for primary production, trade, consumption and electricity generation.

Energy production and trade

In 2018, the primary energy production of the EU-27 was 634 million tonnes of oil equivalent (toe); a toe is a normalised unit of energy, equivalent to the approximate amount of energy that can be extracted from one tonne of crude oil. The sum of primary energy production in the

ENP-South countries (excluding Libya ⁽¹⁾) was around two fifths of that recorded for the EU-27, reaching 255 million toe in 2017 (including 2018 data for Algeria and Jordan and 2016 data for Egypt). Among the eight ENP-South countries for which recent data are available, there were two main primary producers of energy: production was 165 million toe in Algeria in 2018 and 72 million toe in Egypt in 2016 (see Table 10.1). The remaining countries reported production levels in 2017 (2018 data for Jordan) between 9.0 million toe in Israel and 99 thousand toe in Lebanon.

(1) Libya has a relatively large oil and natural gas industry and — according to the annual statistical bulletin of the Organisation of Petroleum Exporting Countries (OPEC) — has the largest oil reserves in Africa, although its primary production was disrupted from 2011 as a result of civil unrest.

Table 10.1: Primary production of energy, 2008-2018
(million toe)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	698.3	668.9	695.8	683.0	689.4	690.1	673.4	657.9	641.9	640.5	633.9
Algeria	175.2	164.6	162.0	157.1	155.6	148.9	154.8	154.4	166.2	165.9	165.2
Egypt	81.9	86.9	86.6	86.7	85.7	82.6	80.2	76.3	71.7	:	:
Israel ⁽¹⁾	:	2.9	3.1	4.0	2.2	5.9	6.9	7.6	8.6	9.0	:
Jordan	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.5	0.6	0.6
Lebanon	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	:
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	2.2	2.2	2.2	2.1	2.0	2.2	2.1	2.2	2.2	2.2	:
Palestine	0.2	0.2	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.2	:
Tunisia	:	:	8.3	7.6	7.6	7.3	6.7	5.2	5.4	5.5	:

Note: Libya, not available.

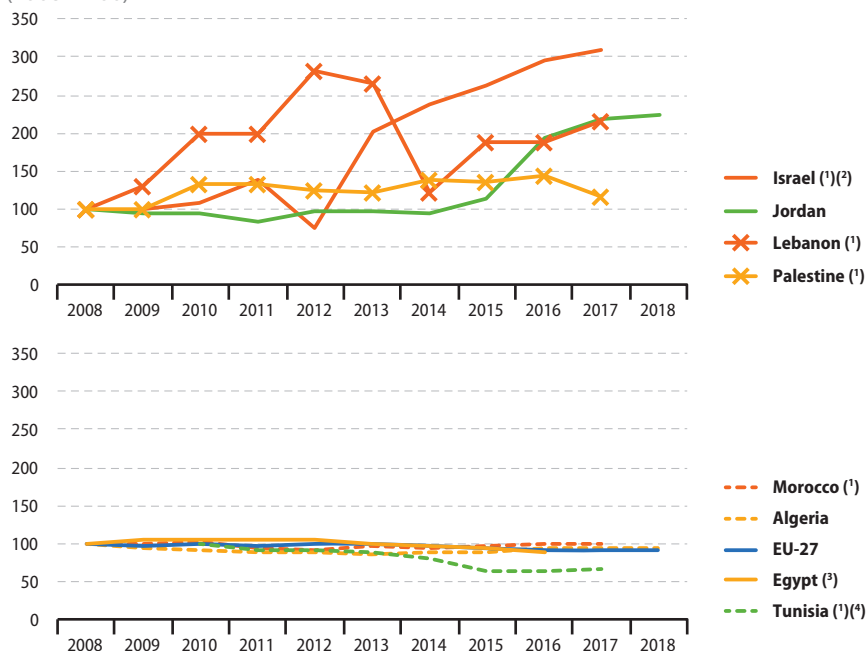
(1) 2013: break in series.

Source: Eurostat (online data code: [nrg_bal_s](#))

The level of primary production of energy may fluctuate considerably as a result of changes in energy demand, energy prices and the weather (particularly for hydropower). Developments may also reflect new energy resources coming on-stream or existing energy resources becoming depleted. Between 2008 and 2018, primary production in the EU-27 fell by 9.2 % overall (see Figure 10.1). There was a similar development for the two largest energy producers among the ENP-South countries as output fell in Algeria (down 5.7 % between 2008 and 2018) and Egypt

(down 12.4 % between 2008 and 2016). Among the smaller producers, Morocco (2008-2017) and Tunisia (2010-2017) also recorded an overall decline in primary production. Four of the ENP-South countries reported an increase in output. Palestine's output was 16.2 % higher in 2017 than in 2008, while Lebanon's more than doubled over the same period and Jordan's more than doubled between 2008 and 2018. The largest increase was recorded by Israel, whose primary production of energy in 2017 was 3.1 times as high as it had been in 2009.

Figure 10.1: Development of primary production of energy, 2008-2018
(2008 = 100)



Note: Libya, not available.

(¹) 2018: not available.

(²) 2008: not available. 2009 = 100. 2013: break in series.

(³) 2017 and 2018: not available.

(⁴) 2008, 2009 and 2018: not available. 2010 = 100.

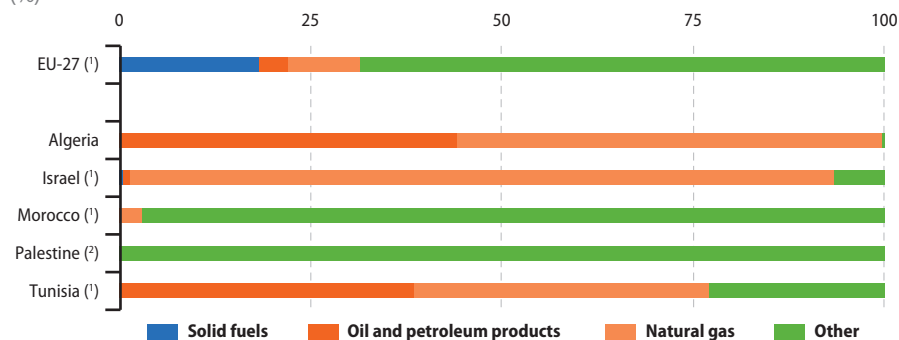
Source: Eurostat (online data code: [nrg_bal_s](#))

The structure of primary energy production in the EU-27 reflects the availability of different fossil fuel deposits and the potential for hydropower, as well as different policies in relation to the production of energy from nuclear fuels and renewables. Figure 10.2 shows that the primary production of energy in some of the ENP-South countries was generally dominated by petroleum products and natural gas; the former

was of particular importance to the energy mix in Algeria (44.1 % of primary production; 2018 data) and Tunisia (38.4 %; 2017 data), while the latter was of particular importance in Israel (92.1 %; 2017 data), Algeria (55.7 %; 2018 data) and Tunisia (38.7 %; 2017 data). Note that there is no recent information available for Egypt or Libya (among the big producers) nor for Jordan or Lebanon.

Figure 10.2: Structure of primary production of energy, 2018

(%)



Note: Egypt, Jordan, Lebanon and Libya, not available.

(1) 2017.

(2) 2015.

Source: Eurostat (online data code: [nrg_bal_s](#))



Trade and consumption

The main difference between levels of primary energy production and gross inland energy consumption is international trade: a shortfall in production needs to be met by net imports, while a production surplus is generally accompanied by net exports. As well as primary production and international trade, gross inland consumption also takes into account changes in stocks and the supply of energy to bunkers (for international maritime transport). Energy-related products represent an important source of foreign revenue for some ENP-South countries, although fluctuations in energy prices may result in considerable variations in the value of trade from one year to the next.

During the period 2008-2018, net imports of energy in the EU-27 fell from 960 million toe in 2008 (at the onset of the global financial and economic crisis) to 883 million toe in 2009, a fall of 8.0 %. Thereafter, there was a modest increase in 2010 followed by four consecutive years of falling net imports of energy to a low of 799 million toe in 2014 and then four years of increases to reach 885 million toe in 2018. As a consequence, net imports in 2018 were 7.8 % lower than they had been in 2008.

Among the ENP-South countries, the largest net importers of energy products were Morocco

(19.5 million toe in 2017) and Israel (15.9 million toe in 2017). It is also interesting to note that, despite being endowed with considerable natural resources, Egypt was also a net importer of energy products (10.6 million toe in 2016). By contrast, Algeria was a sizeable net exporter of energy, some 100.4 million toe in 2018.

Table 10.2 shows the development of net imports of primary energy in quantity, not value. The development for Egypt is unusual: it was a net exporter in 2008 with net exports rising to a peak in 2010; from 2011 onwards the size of the net exports fell; in 2014 Egypt became a net importer of energy products with the size of its net imports increasing in 2015 and 2016. The other net exporter in 2008, Algeria, remained a net exporter throughout the period studied, although there was a steady decline in the quantity of its net exports through until 2018 with only one annual increase (in 2016). In 2018 its net exports were 24.4 % lower than they had been in 2008. The other ENP-South countries for which data are available were all net importers of energy in 2008 (2009 for Israel and 2010 for Tunisia) and remained so throughout the period shown in Table 10.2. Israel's net imports fell 19.3 % between 2009 and 2017 while elsewhere they increased, most notably in Tunisia where net exports in 2017 were 2.8 times as high as they had been in 2010.

Table 10.2: Net imports of energy, 2008-2018
(million toe)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	960.2	883.3	895.6	879.2	844.8	820.1	798.8	833.4	843.2	882.1	885.3
Algeria	-132.7	-120.0	-118.0	-110.8	-104.1	-95.4	-95.3	-94.4	-106.3	-103.8	-100.4
Egypt	-12.2	-16.2	-17.8	-16.3	-15.1	-12.2	0.5	7.3	10.6	:	:
Israel (*)	:	19.8	19.9	17.8	21.7	17.9	15.7	16.6	14.9	15.9	:
Jordan	7.2	7.5	7.5	7.0	8.0	7.6	8.4	8.8	9.0	9.3	:
Lebanon	4.5	5.5	5.8	6.3	7.1	6.4	7.4	7.8	8.2	8.5	:
Libya	:	:	:	:	:	:	:	:	:	:	:
Morocco	14.1	14.7	16.3	17.5	19.5	18.6	19.5	18.7	18.6	19.5	:
Palestine	1.0	1.1	1.1	1.2	1.2	1.3	1.4	1.5	1.6	1.6	:
Tunisia	:	:	2.1	2.5	3.0	3.4	4.1	4.6	4.7	5.9	:

Note: Libya, not available. A negative value indicates that a country is a net exporter of energy, rather than a net importer.

(*) 2013: break in series.

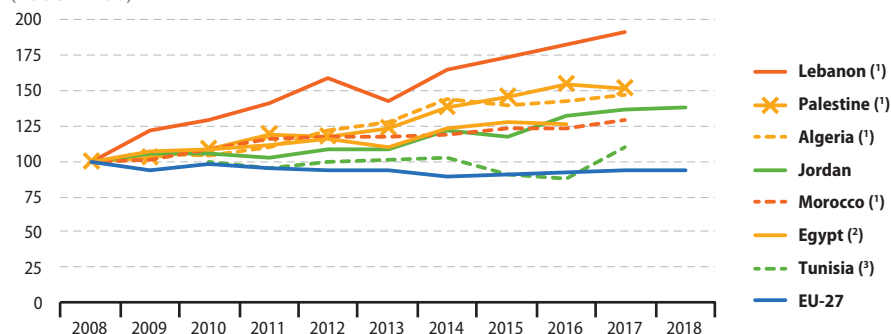
Source: Eurostat (online data code: [nrg_bal_s](#))

Figure 10.3 shows the development of gross inland energy consumption over the most recent decade for which data are available, again presented as an index. There was a marked reduction (7.2 % overall) in the level of energy consumption in the EU-27 during the period 2008-2018, which may, at least in part, be attributed to efforts to improve energy efficiency, but may also reflect economic developments. In 2018 the gross inland energy consumption of the EU-27 was 1.48 billion toe. The highest levels of gross inland energy consumption among the ENP-South countries were recorded in the most populous countries: Egypt (81.9 million toe; 2016 data) and Algeria (61.5 million toe; 2017 data), while the third highest level of gross inland energy consumption was recorded in Israel (22.9

million toe; 2017 data), a level that was slightly higher than in Morocco (21.5 million toe; 2017 data).

In contrast to the developments for the EU-27, among the ENP-South countries gross inland energy consumption increased in recent years. Between 2008 and 2017, gross inland energy consumption in Lebanon grew by 90.8 %, while there was growth of 50.8 % in Palestine and 45.8 % in Algeria during the same period. Increases between 25.7 % and 37.2 % were also recorded in Egypt (2008-2016), Morocco (2008-2017) and Jordan (2008-2018). The lowest level of growth (the time series for Israel and Libya are too short or not available) was recorded by Tunisia, up 9.4 % between 2010 and 2017.

Figure 10.3: Development of gross inland consumption of energy, 2008-2018
(2008 = 100)



Note: Israel and Libya, incomplete or not available.

(¹) 2018: not available.

(²) 2017 and 2018: not available.

(³) 2008 and 2009: not available. 2010 = 100. 2018: not available.

Source: Eurostat (online data code: [nrg_bal_s](#))

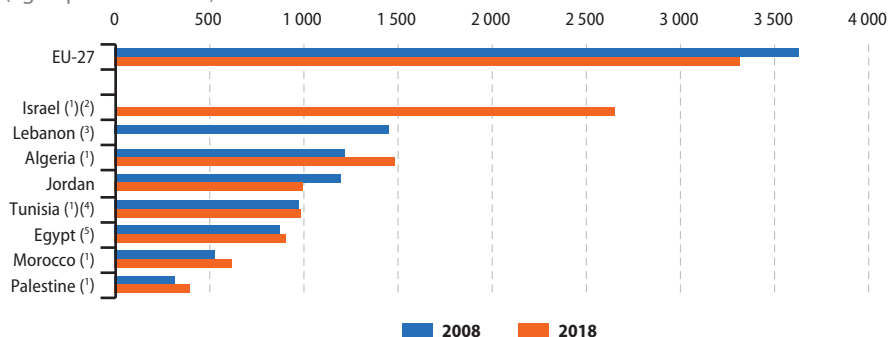


In 2018, gross inland energy consumption in the EU-27 averaged 3 313 kilograms of oil equivalent (kgoe) per inhabitant, a reduction of 316 kgoe per inhabitant when compared with 2008 (see Figure 10.4). Part of this decline may be attributed to a relatively slow rate of economic growth. However, some of the decline may be attributed to efforts to improve energy efficiency in a variety of areas/applications, for example, within businesses, houses, or for means of transport.

All of the ENP-South countries recorded gross inland energy consumption per inhabitant below the level registered in the EU-27: Israel had the highest level of gross inland energy consumption per inhabitant among the ENP-South countries, at 2 654 kgoe (2017 data). Between 2008 and 2017 there was an increase in gross inland energy consumption per inhabitant in Algeria, Palestine, Morocco, Egypt (2008-2016) and Tunisia (2010-2017). By contrast, gross inland energy consumption per inhabitant fell in Jordan (2008-2018).

Figure 10.4: Gross inland consumption of energy relative to population size, 2008 and 2018

(kgoe per inhabitant)



Note: Libya, not available.

(*) 2017 instead of 2018.

(*) 2008: not available.

(*) 2009 instead of 2008. Population data exclude the population of Palestinian refugee camps in Lebanon. 2018: not available.

(*) 2010 instead of 2008.

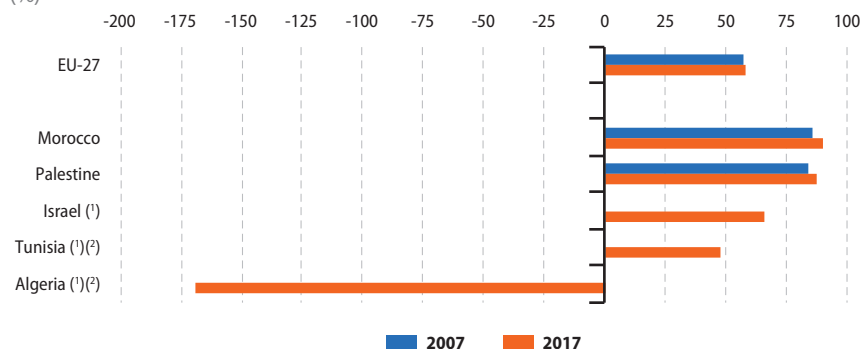
(*) 2016 instead of 2018.

Source: Eurostat (online data codes: [nrg_bal_s](#) and [demo_pjan](#))

As noted above, the EU-27 was a net importer of energy (885 million toe) in 2018, with net imports accounting for a somewhat larger share of inland consumption than primary production (634 million toe). In other words, more than half of the energy requirements of the EU-27 were imported from non-member countries, leading to an energy dependency ratio of 58.2 %. For reasons of data availability, Figure 10.5 shows data for 2007 and 2017, when the energy dependency rate of the EU-27 was 57.3 % and

57.5 % respectively. As noted above, Algeria was the only net exporter among the ENP-South countries in the latest year for which data are available, resulting in a negative dependency rate. Elsewhere Tunisia had a slightly lower dependency rate (47.9 %) than the EU-27, while Israel, Palestine and Morocco were even more reliant on energy imports. The highest energy dependency ratio in 2017 among these countries was 89.7 % in Morocco.

Figure 10.5: Energy dependency, 2007 and 2017
(%)



Note: calculated as net imports/(gross inland consumption+marine bunkers)*100. Egypt, Jordan, Lebanon and Libya: not available.

⁽¹⁾ 2007: not available.

⁽²⁾ Net exporter.

Source: Eurostat (online data code: [nrg_bal_s](#))

Figure 10.6 shows the structure of final energy consumption. Within the EU-27, there was a relatively balanced split between the different energy uses in 2018. Transport accounted for three tenths (30.5 %) of final energy consumption, while households (26.1 %) and industrial activities (25.8 %) each accounted for just over one quarter, leaving approximately one sixth (17.6 %) of the total attributed to 'other activities', primarily services (including those of the state), agriculture, forestry and fishing.

Three of the ENP-South countries — Palestine (2017 data), Algeria (2018 data) and Tunisia (2017 data) — reported that households had a higher share of their final energy consumption than the EU-27 average, while Morocco (2017 data) and Jordan (2018 data) reported lower shares. The share of households peaked at 38.4 % in Palestine.

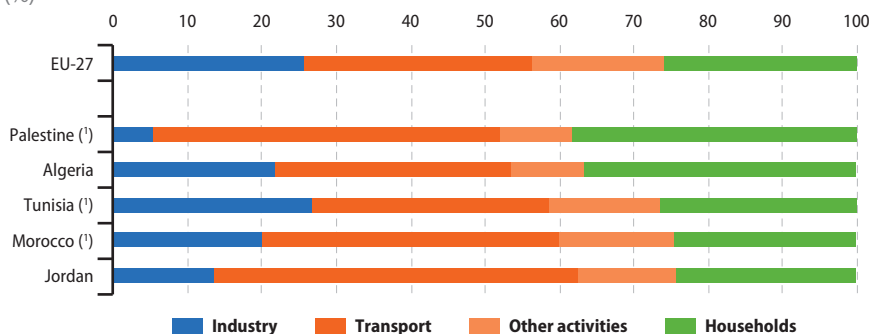
In 2017, the industrial sector in Tunisia was a major consumer of energy, accounting for 26.9 % of final energy consumption. In the other four ENP-South countries for which data are available, the share of industry was less than observed in the EU-27 and ranged from 21.7 % in Algeria down to 5.4 % in Palestine.

In contrast to what was observed for industry, the relative share of transport in final energy consumption varied little across the ENP-South countries. In 2018, this share ranged from lows of 31.7 % and 31.8 % in Algeria and Tunisia (2017 data) to a high of 48.9 % in Jordan, all of which were above the share in the EU-27.

As in the EU-27, other activities accounted for the smallest share of final energy consumption in the ENP-South countries. Shares ranged from 9.7 % in Palestine to 15.4 % in Morocco (both 2017 data) and as such this share was smaller in all of the ENP-South countries than it was in the EU-27.

Figure 10.6: Structure of final energy consumption, 2018

(%)



Note: ranked on households. Egypt, Israel, Lebanon and Libya: not available.

(*) 2017.

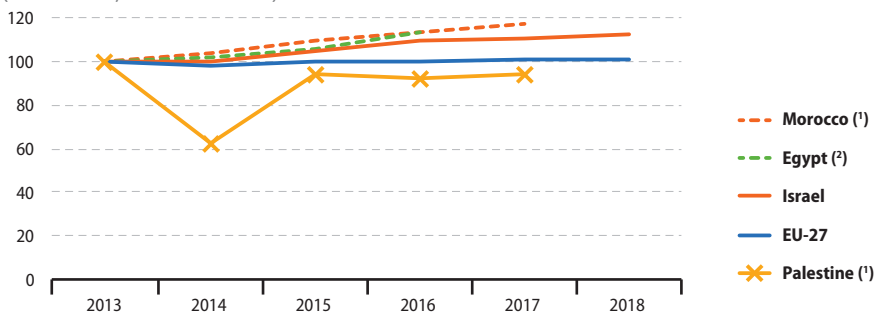
Source: Eurostat (online data code: [nrg_bal_s](#))

Electricity

In 2018, gross electricity generation in the EU-27 was 2.94 million gigawatt hours (GWh). The level of electricity generation in the ENP-South countries was highest in Egypt (186 thousand GWh in 2016), followed by Algeria (77 thousand GWh in 2018) and Israel (69 thousand GWh in 2018). Morocco (2017 data), Jordan (2018 data) and Tunisia (2017 data) recorded output in the range of 21-33 thousand GWh, with Palestine's output (501 GWh) considerably lower.

Figure 10.7 shows the development of gross electricity generation in recent years for four of the ENP-South countries as well as the EU-27. The quantity of electricity generated in the EU-27 grew overall by 0.9 % during the period 2013-2018. Palestine was the only one of the four ENP-South countries to report a lower level of electricity generation in 2017 compared with 2013, with a 6.2 % contraction. By contrast, there were increases in the levels of electricity generation in Israel (2013-2018), Egypt (2013-2016) and Morocco (2013-2017) ranging from 12.4 % to 17.0 %.

Figure 10.7: Development of gross electricity generation, 2013-2018
(2013 = 100, based on GWh)



Note: Algeria, Jordan, Lebanon, Libya and Tunisia, not available.

⁽¹⁾ 2018: not available.

⁽²⁾ 2017 and 2018: not available.

Source: Eurostat (online data code: [nrg_bal_peh](#))

11

Environment



The environmental statistics presented here for the ENP-South countries and the European Union (EU) concern the physical environment, waste, water and wastewater, and emissions.

Physical environment

The total area (including inland waters) of the EU-27 is 4.23 million square kilometres (km²), of which approximately 97 % (4.10 million km²) is land. Among the seven ENP-South countries for which data are available (see Table 11.1; no data

available for Libya), three are considerably larger than the others. The total area of Algeria was 2.38 million km², that of Egypt was 1.00 million km² and that of Morocco was 711 thousand km². All three of these were larger than France (the largest of the EU Member States with an area of 638 thousand km²) and the combined area of these three ENP-South countries was equivalent to 97 % of that of the EU-27. The smallest of the ENP-South countries were Lebanon (10.5 thousand km²) and Palestine (6.0 thousand km²; land area only).

Table 11.1: Territorial indicators
(km²)

	Total area	Land area
EU-27	4 225 158	4 103 828
Algeria	2 381 741	:
Egypt	1 001 450	:
Israel	22 072	21 643
Jordan	89 318	88 778
Lebanon	10 452	:
Libya	:	:
Morocco	710 850	:
Palestine	:	6 025
Tunisia	164 150	:

Source: Eurostat (online data code: [reg_area3](#))

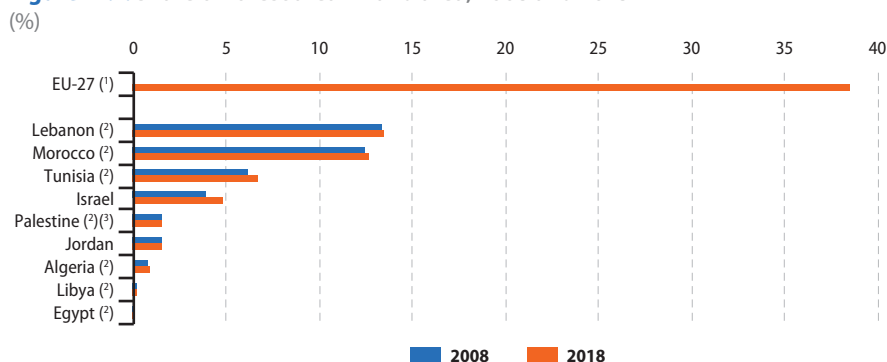


Forests

Forests are considered to have a crucial role in mitigating climate change, as well as having social, economic and wider environmental roles. Data on forest resources may be used as an indicator to measure how adequately forest resources (forest types and characteristics) are being maintained and whether or not these resources continue to support social, economic and environmental objectives. Contrary to what is happening in many other parts of the world,

the area covered by forests and other wooded land in the EU-27 is slowly increasing. In 2015, forests accounted for 38.4 % of all land area in the EU-27, a share that was 2.9 times as great as that observed in Lebanon (13.4 % in 2017) which had the highest share among the ENP-South countries (see Figure 11.1). Aside from Lebanon, Morocco was the only other ENP-South country to record a double-digit share (12.6 %; 2017 data) of forest cover. By contrast, forests accounted for less than 1.0 % of the land area of Algeria, Libya and Egypt in 2017.

Figure 11.1: Share of forest area in land area, 2008 and 2018



(1) 2008: not available. 2015 instead of 2018.

(2) 2017 instead of 2018. Source: Food and Agriculture Organisation of the United Nations.

(3) West Bank and Gaza.

Source: Eurostat (online data codes: for_area and reg_area3) and the Food and Agriculture Organisation of the United Nations

Waste

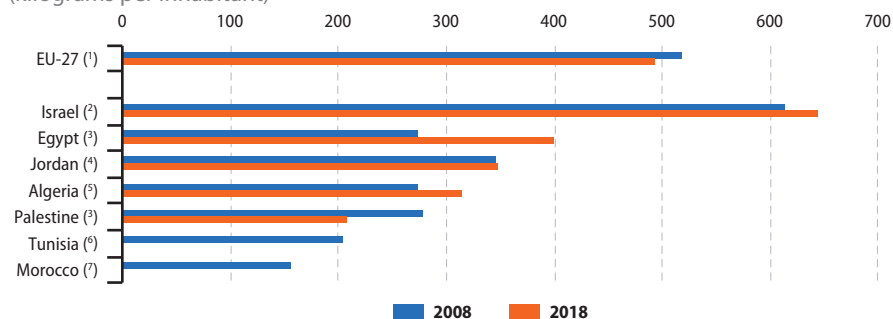
Municipal waste is mainly produced by households, though similar wastes from sources such as distributive trades, offices and public institutions are included; waste from agriculture and from industry is excluded from this indicator. The amount of municipal waste generated consists of waste collected by or on behalf of municipal authorities and disposed of through the waste management system. For areas not covered by a municipal waste collection scheme estimates of the amount of waste generated should be included.

In 2018, the average amount of municipal waste generated per inhabitant in the EU-27 was

492 kilograms (kg), in other words, just under half a tonne for each person. This represented a fall of 26 kg in the quantity of waste generated per inhabitant across the EU-27 since 2008. Among four of the five ENP-South countries for which recent data are available, the average quantity of municipal waste ranged from 208-400 kg per inhabitant. Israel was above this range with an average of 643 kg per inhabitant (which was also above the EU-27 average; see Figure 11.2). Between the years shown in Figure 11.2, the quantity of municipal waste generated per inhabitant clearly increased in three of the five ENP-South countries for which data are available, increased marginally in Jordan (2008-2017) and fell in Palestine (2008-2015).

Figure 11.2: Quantity of municipal waste generated relative to population size, 2008 and 2018

(kilograms per inhabitant)



Note: Lebanon and Libya, not available.

⁽¹⁾ Estimates.

⁽²⁾ Collected waste.

⁽³⁾ 2015 instead of 2018.

⁽⁴⁾ 2017 instead of 2018.

⁽⁵⁾ 2009 instead of 2008. 2017 instead of 2018.

⁽⁶⁾ 2018: not available.

⁽⁷⁾ 2010 instead of 2008. 2018: not available.

Source: Eurostat (online data code: [env_wasmun](#))



Water and wastewater

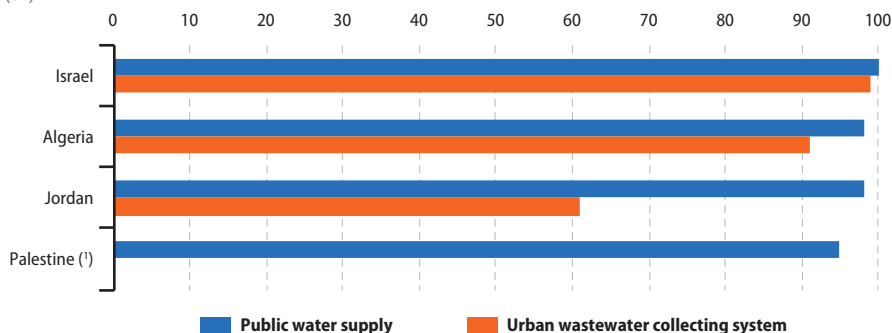
Water is essential for life, it is an indispensable resource for the economy, and also plays a fundamental role in the climate regulation cycle. The management and protection of water resources, of fresh and salt water ecosystems, and of the water we drink and bathe in is therefore one of the cornerstones of environmental protection.

The vast majority of the population in the four ENP-South countries for which data are available were connected to the public water supply in 2018, ranging from 95 % in Palestine (2015 data), through 98 % in Algeria and Jordan, to 100 % in Israel (see Figure 11.3). By comparison, among the 27 EU Member States the share ranged from 68 % in Romania to 100 % in Spain,

Cyprus, Luxembourg, Hungary, Malta and the Netherlands.

There was a relatively large difference between the three ENP-South countries shown in Figure 11.3 in terms of the proportion of their respective populations that were connected to urban wastewater collecting systems (with or without treatment). In Israel and Algeria, the shares in 2018 were 99 % (of households) and 91 % respectively, in other words similar to the share connected to the public water supply. By contrast, in Jordan the share was 61 %, some 37 percentage points lower than the share connected to the public water supply. Among the 27 EU Member States the share ranged from 51 % in Romania to 100 % in Luxembourg and the Netherlands.

Figure 11.3: Proportion of the population connected to public water supply and to urban wastewater collecting systems, 2018
(%)



Note: Egypt, Lebanon, Libya, Morocco and Tunisia, no recent data available.

EU-27 average: not available. Range among those EU Member States for which recent data are available: for public water supply, minimum value 68 % in Romania and maximum value 100 % in Spain, Cyprus, Luxembourg, Hungary, Malta and the Netherlands; for urban wastewater collection, minimum value 51 % in Romania and maximum value 100 % in Luxembourg and the Netherlands.

(*) 2015. Urban wastewater collecting system: not available.

Source: Eurostat (online data codes: env_wat_pop and env_ww_con)

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Statistics on European Neighbourhood Policy Countries: South 2020 edition

The 2020 edition of *Statistics on European Neighbourhood Policy Countries: South* presents key statistical data for 9 of the 10 ENP-South countries — Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine and Tunisia — as well as for the EU. It has not been possible to collect recent data from Syria which is therefore not covered by this publication.

The publication of tables, figures and analyses is structured into 11 chapters: population; health; education; the labour market; economy and finance; international trade in goods; agriculture, forestry and fishing; tourism; communications and transport; energy; and the environment.

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