



IDSC IN BRIEF

Acting as the Egyptian Cabinet's Think Tank...Our mission is to impartially support the government decisions through proposing best policy scenario mix and preparing analytical research to improve the socio-economic well-being of the Egyptian society.

Since Egypt has embarked on an ambitious reform process, the climate surrounding such process has increasingly become more complex and interconnected. It has become evident that public policy design demands a variety of professional policy options.

IDSC derives its success from being a multidisciplinary institution which is capable of meeting these outstanding demands. Moreover, operating at the heart of the decision-making process in Egypt, IDSC encourages public debate on its research findings, which are openly available to all members of the society.

Being a progressive organization, IDSC works to establish cooperation linkages with international counterparts. The main purpose is to share knowledge and integrate best practices into its operations. We appreciate our existing partnerships and we look forward to developing new ones hoping that through cooperation in mutual areas of interest, we will have a significant impact on developing the decision-making process in Egypt.

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ANNOUNCEMENTS

The Second Cairo International Conference on Public Opinion "Public Opinion Polls in a Changing Society"

Public opinion is a crucial driving force in any society, as it reflects peoples' perception of policies, regulations and services. Methods have, therefore, risen to measure public opinion in order to aid governments in acting upon their citizens' views; which completes the notion of democracy. One of these methods is public opinion polls, which when conducted on scientific basis act as accurate barometers to societies' feedback on specific subjects. The Egyptian Cabinet's Information and Decision Support Center has established the first of its kind Public Opinion Poll Center in the region; which often raises great controversy due to the sensitive issues it tackles.

The Second Cairo International Conference on Public Opinion was held to discuss the role public opinion plays,

politically, economically and socially; and the means to measure it. The conference was organized by the Information and Decision Support Center's Public Opinion Poll Center, in cooperation with Konrad Adeneuar Stiftung and Ford Foundation. It tackled issues ranging from "Opinion Polls and the Relation to the Other", "Opinion Polls and Democracy" to "Opinion Polls and the Media"

The conference participants suggested establishing an "Arab Network for Surveys and Public Opinion Polls' Centers". The Network would, mainly, aim at disseminating and sharing expertise and best practices in the field of public opinion measurement.

Dr. Mohamed Younis delivers a speech at IDSC

The Egyptian Cabinet's Information and Decision Support Center (IDSC) welcomed Dr. Mohamed Younis, Senior Analyst at Gallup Center for Muslim Studies in Washington, D.C. – USA. Dr. Younis started his speech by presenting a brief about Gallup Center's research work and surveys covering 170 countries across the world.

He introduced the Muslim West Facts Project (MWFP) which is set up with the mission of disseminating key poll findings to opinion leaders, policymakers and members of civil society so that facts about both the Muslims and the west - and not stereotypes - inform debates.

Dr. Younis highlighted the main findings of the (MWFP) surveys that demonstrate people's actual perceptions and mental image of Muslims about the West and vice versa.

Most surveys have shown that Americans' information about Islam, as a religion, is very shallow and in most cases they do not have any information at all. Thus, it is primarily a communication problem that leads to the bias against Muslims by the West, in general, and by Americans, in particular. This was supported by the fact that 57%

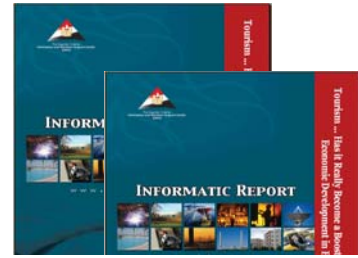
of information about Islam in the West is delivered through political news related to terrorist attacks and violent movements affiliated to Islam. Another important finding is that the basic barrier between Muslims and the West is not ideological nor religious, it is rather a political one. This finding was demonstrated through a survey carried out by Gallup to examine Muslim's views of the United States Versus Canada (as those two countries have very similar cultural and religious contexts but different foreign policies) and the result was a vast gap between Muslims' negative views to the US versus Canada.

Despite all the differences and conflicts, there is a kind of common ground between Muslims and Americans; this was indicated through placing democracy and technology as the top appreciated values in the West by the two parties. The above clearly refutes the argument that Arabs and Muslims are against the values of democracy and freedom. Finally, the session was concluded by highlighting the possible areas of cooperation between Gallup and IDSC as a regional partner in the Middle East.

Reports:

THE INFORMATION AND DECISION SUPPORT CENTER RELEASES A SERIES OF INFORMATION REPORTS ABOUT DIVERSE ISSUES OF INTEREST TO THE PUBLIC AND DECISION-MAKERS.

THE FOLLOWING INTRODUCES ONE OF THESE REPORTS.



Do Egyptian Women Have an Active Role in the Political Life?

Women play a pivotal role in the community, amounting for 49% of Egypt's population. Since the time of the pharaohs, women played a notable role in Egypt's history and continued to do so in different historical stages.

Nevertheless, Egyptian Women's political rights were acquired only after issuing the 1956 Constitution, which gave them the right to be nominated and to vote, becoming the first country in the Arab region to give women these rights.

In 2009, the Parliament Law No. 38 of 1972 has been amended, to allocate 64 seats for women in the parliament, for two terms only, as a mean to support the role of women's parliamentary and political participation.

1. Women's Political Participation:

- The ratio of women enrollment in voting registries has increased between 1975 and 2007, rising from 16% to about 40% of the total enrolled in voting registries.



- Although the percentage of member women in the Egyptian Parliament, has decreased from 9% in 1979-1984 parliamentary session, to 1.8% in 2005-2010 session.

- however; their percentage in the Shura Council has increased between 1980 and 2007 from about 3% to 8% of total members.



2. Women in the Senior Managerial Positions:

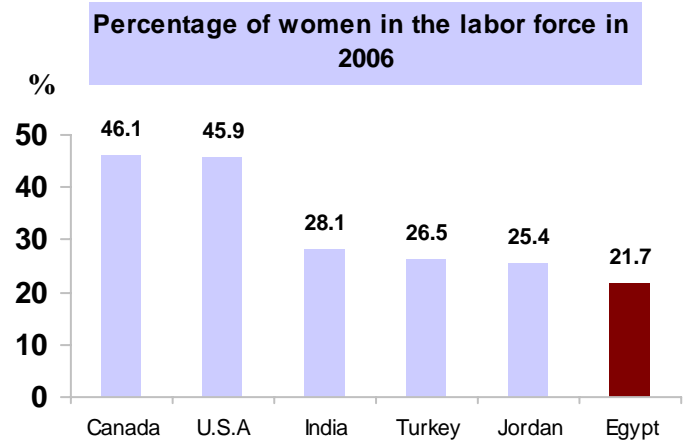
The percentage of women in senior managerial positions has increased from 7.3% to 24.1% of total managerial positions between 1988 and 2008.

3. Women in Diplomatic Careers:

The female premium ambassadors reached 31.6% of the total premium ambassadors.

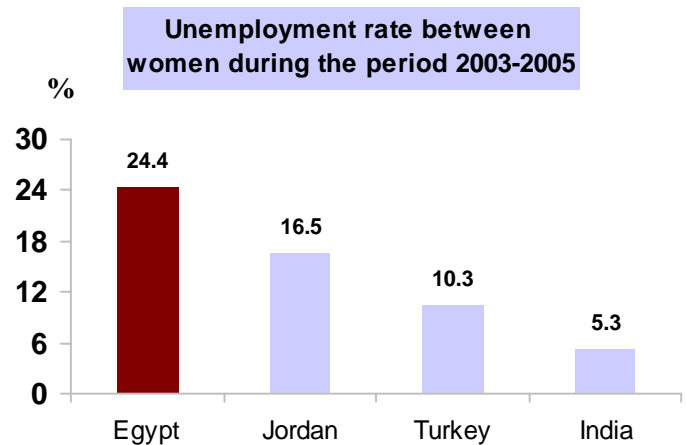
4. Women in the Labor Force:

- The percentage of women in the Egyptian labor force reached 21.7%, compared to 25.4% in Jordan in 2006.
- It is worth mentioning that women's contribution to the labor force in both America and Canada were 45.9% and 46.1% respectively in 2006.



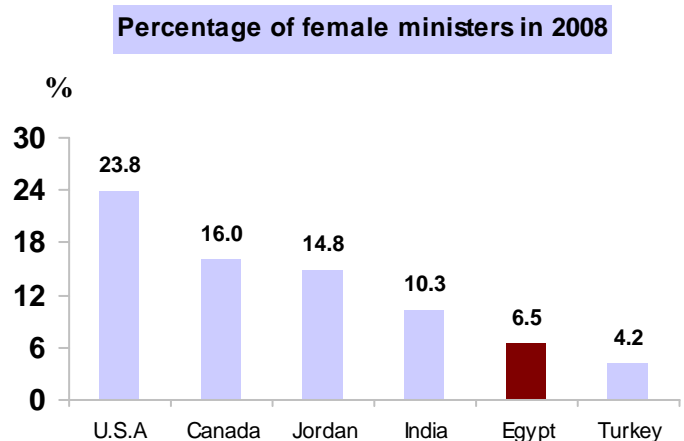
5. Unemployment Rate among Women

The unemployment rate among women in Egypt has reached 24.4% versus 10.3% among women in Turkey during the period 2003-2005, while the unemployment rate among women was 16.5% and 5.3% in Jordan and India, respectively during the same period.



6. Women as Ministers

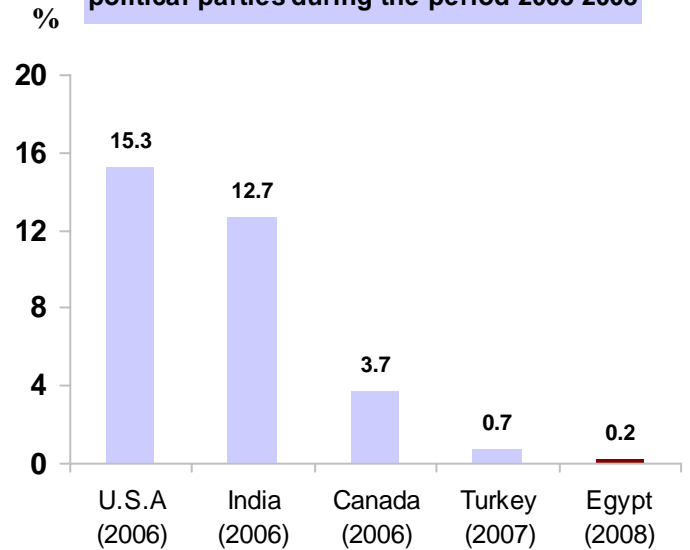
- The ratio of female ministers varied among countries in 2008, the percentage of female ministers in the U.S.A. was about 24% of total ministers, compared to about 4% in Turkey in 2008.
- The percentage of Egyptian female ministers was around 7%, compared to about 15% in Jordan during 2008.



7. Membership in Political Parties:

- The percentage of women who are active members in political parties in Egypt was 0.2% in 2008, compared to about 15% in the U.S.A. in 2006.
- The Percentage of women who voted in the last parliamentary elections held in Egypt reached 19%, compared with Turkey, where the percentage of women in the last election reached 77.6%.

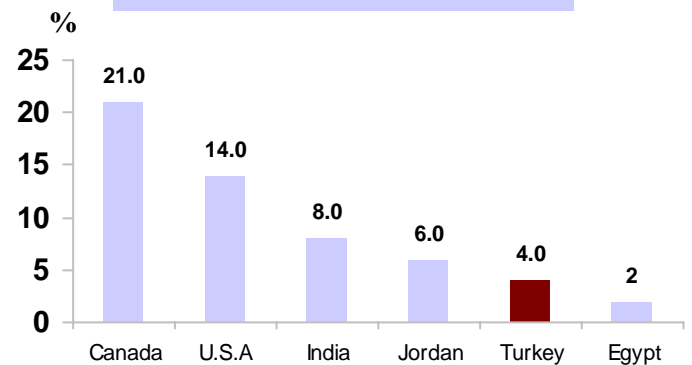
The percentage of active members in political parties during the period 2005-2008



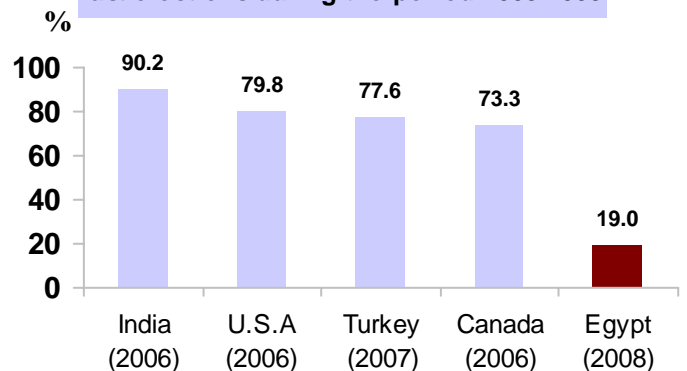
8. Women Representation in the Parliament:

- The percentage of women representation in the Egyptian parliament reached 2% of the total members in 2004, compared to 6% in Jordan in the same year.
- In the U.S.A, female members in the parliament reached 14%, compared to 21% in Canada in 2004.

Percentage of women members in the parliament in 2004



Percentage of women who voted in the last elections during the period 2005-2008



Studies:

In the last two issues of the newsletter an introduction was given to the study conducted by IDSC titled **The Business Environment for MSMEs in Egypt: Current Situation, Challenges and Opportunities** where the main players affecting the sector's development were portrayed. In this issue, the main constraints which hinder the sector's development will be presented.

The Business Environment for MSMEs in Egypt: Current Situation, Challenges and Opportunities

The sector's development is faced with two primary constraints; the first is the poor financial and non-financial services offered to it and the second lies in the fact that there is little cooperation between the sector's different enterprises, on one hand, and between the sector and large enterprises, on the other.

One of the main constraints facing MSMEs' development is its limited ability to obtain financial resources, through banks and the Social Fund for Development (SFD). Banks are often reluctant to offer loans to MSMEs as they lack the collateral which banks and other formal financial channels view as necessary to submit. Although the SFD is exerting great effort to provide the sector with the necessary funding, however, more effort should be exerted by the SFD itself and by other channels of finance if MSMEs are to develop and expand.

Another constraint which, according to the report, hinders the development of MSMEs is the weakness of the non-financial services offered to them. Despite the numerous official, non-governmental and international entities which offer assistance to develop MSMEs, however, most of these concentrate on the financial aspect and neglect the non-financial aspects which could be offered to assist in developing MSMEs. In addition, MSMEs themselves often show no interest in receiving non-financial forms of assistance. The non-financial assistance which could be offered to MSMEs can take the form of preparing feasibility studies, marketing techniques, management plans and technical training.

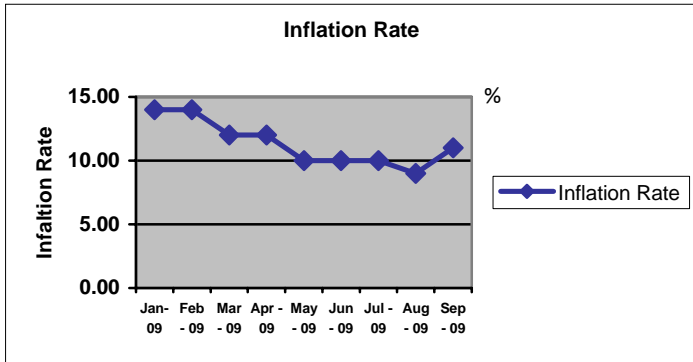
The second, according to the report hinders the sector's development is the lack of cooperation between the sector's different players on one hand and the large enterprises on the other.

Figures to Remember:

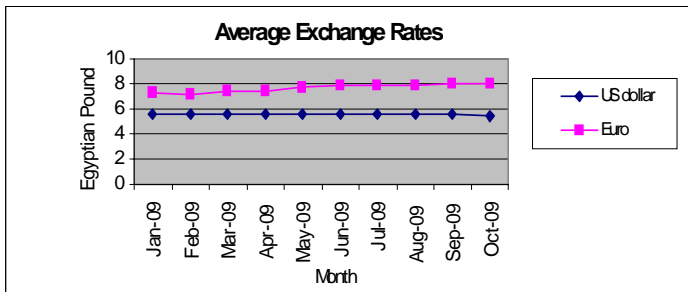
The IDSC Economic and Social Indicators Bulletin is a monthly summarized record of the most important facts about the financial, real, and social aspects of the Egyptian economy. The newsletter presents a number of these vital figures and indicators that provide you with a quick snap shot on the Egyptian economy.

Financial Indicators :

- Inflation Rate:** The Egyptian economy enjoyed a decrease in its inflation rate from 14.3 % in January 2009 to 11 % in September 2009



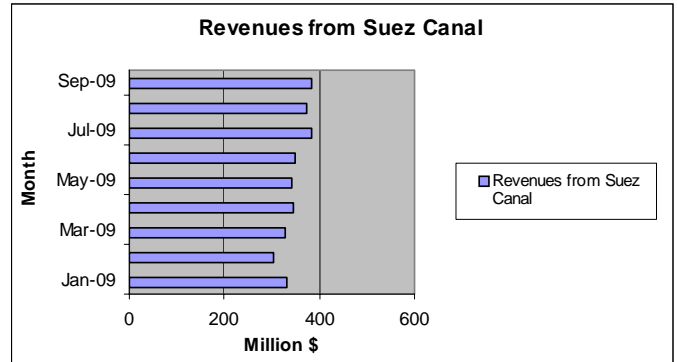
- Exchange Rate:** The exchange rate of the Egyptian pound can be described as stable since the beginning of 2009.



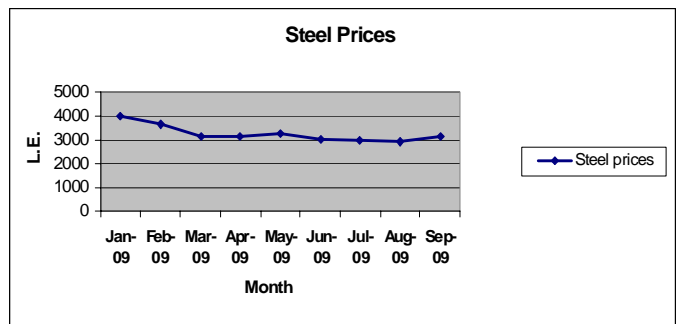
Average exchange rate (Oct.09):
 USD1:L.E 5.47 EUR1:L.E8.07

Real Economy's Indicators:

- Revenues from Suez Canal:** Suez Canal revenues witnessed minor fluctuations from January to September 2009.



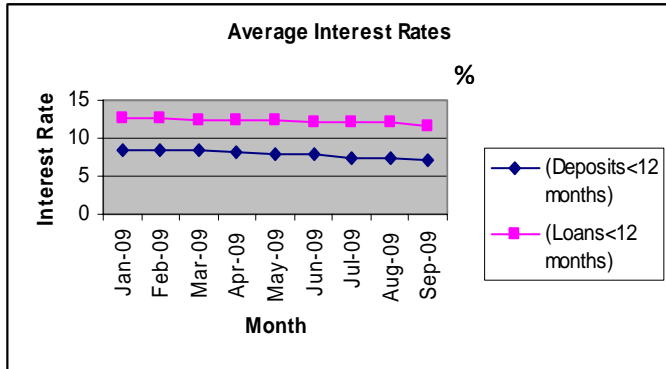
- Average Steel Prices:** Steel prices have decreased through the first 3 quarters of 2009 from L.E. 3981 in January 2009 to L.E. 3126 in September 2009.



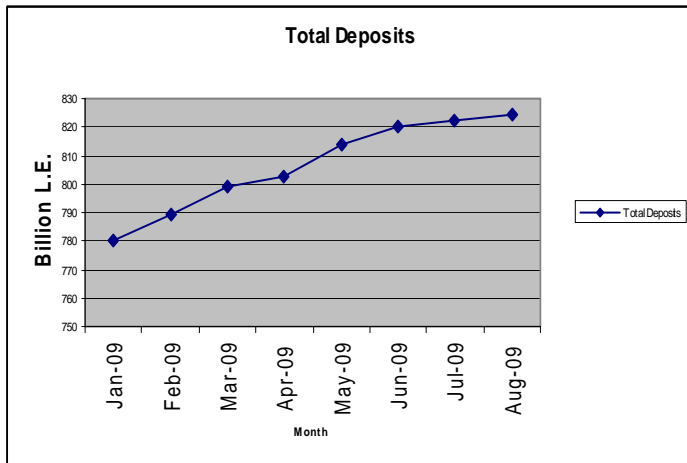
Other Figures:

Banking Indicators

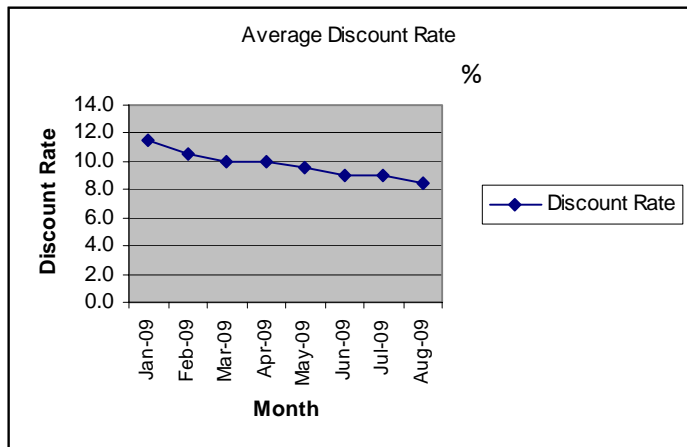
- Average Interest Rates have witnessed a decrease from January to September 2009.



Total Bank Deposits have witnessed an increase from L.E.781 billion in January 2009 to L.E. 824 billion in August 2009.

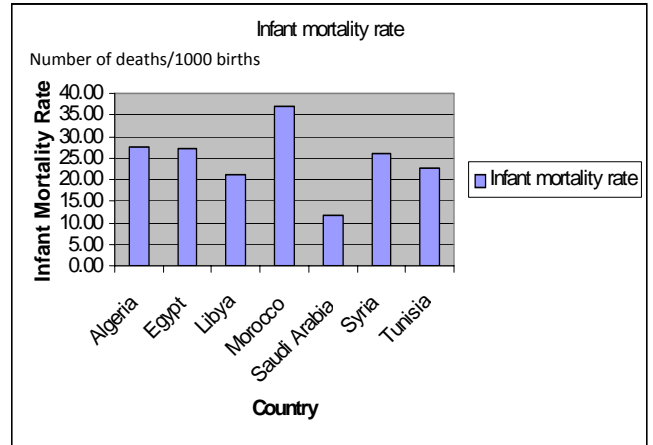


Average Discount Rates have decreased from 11.5% in January 2009 to 8.5% in September 2009.

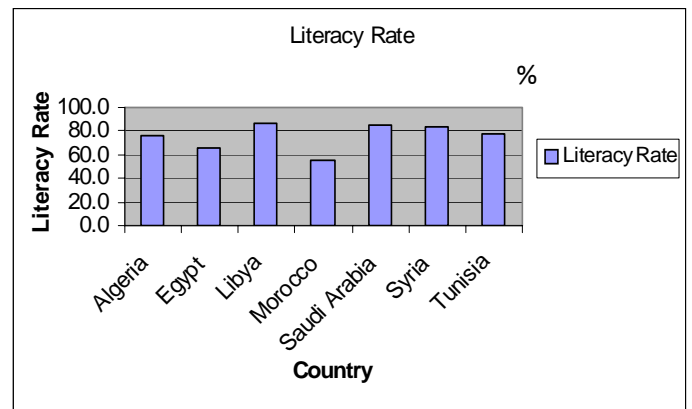


Social Indicators:

- Population (2008/2009): 74.4 million.
- Population Growth Rate (2008/2009): 1.9%.
- Infant Mortality Rate (2009): 27.26 deaths/1000 live births.



- Life Expectancy at Birth (2009): 72.12 years.
- Adult Literacy Rate (2007): 66.4%.
- Gross Enrollment Ratio (2007): 76.4%.



Economic Observatory Report:

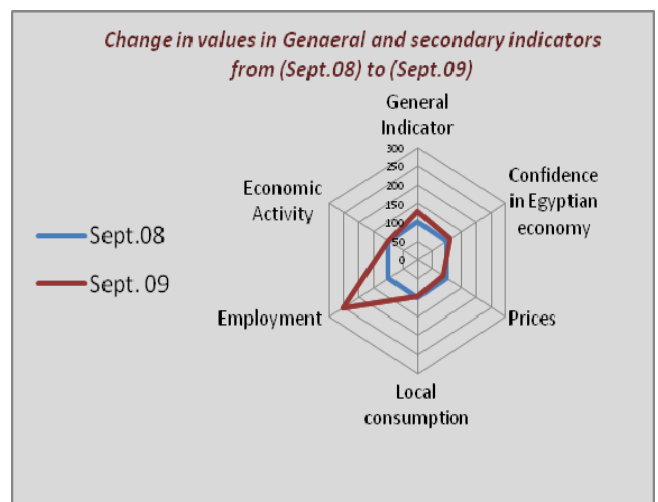
Assessment of the global financial crisis effects on the Egyptian economy:

The global financial crisis has affected most of the world's economies; as Egypt is becoming more integrated into the world economy, it was not guarded from the repercussions of the crisis. A need, therefore, has risen for measuring the effect of the financial crisis on the Egyptian economy and for identifying the time when Egypt's economy will recover from these effects. This will help develop the policies necessary to avoid negative implications on economic growth and standard of living. The Information and Decision Support Center has published an economic observatory report for this purpose.

Indicators (points)	Sept.08	Jul-09	Aug. 09	Sept. 09	Change from July to August	Change from August to September	September compared to situation before the crisis
General Indicator	100	99.1	110.3	130.1	▲	▲	●
Economic Activity	100	96.6	93.2	100.01	▼	▲	●
Employment	100	106.1	163.4	255	▲	▲	●
Local consumption	100	92.5	91.3	98.4	▼	▲	●
Prices	100	88.2	88.2	85.2	■	▼	●
Confidence in Egyptian economy	100	111.9	115.3	111.9	▲	▼	●

- ▲ Improving
- No change
- Recovered
- ▼ Diminishing
- Not Recovered

The observatory is comprised of a main index in which the economic performance is measured from Zero to 100 points; zero reflecting lowest performance and 100 reflecting the return of the indicators to the pre-crisis situation; and scoring more than 100 means the situation has improved compared to that before the crisis. The major index is divided into sub-indices, which measures the performance of the economy's different sectors.





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