
SYNTHESIS OF RESULTS

SURVEY OF EXPERTS AND ACTORS ON THE EURO-MEDITERRANEAN PARTNERSHIP: SYNTHESIS OF RESULTS

The Euro-Mediterranean Partnership (EMP) has experienced a marked evolution since its establishment at the Barcelona Conference in 1995 as the reference framework for political, economic and social relations between the European Union and the Southern and Eastern Mediterranean Countries. Indeed, a number of new policies, instruments and structures have been introduced, in particular since 2005, namely:

I) The European Neighbourhood Policy (ENP), progressively established between 2002 and 2006, and the new European Neighbourhood and Partnership Instrument (ENPI), which entered into force in January 2007 to fund EU regional and bilateral cooperation programmes in the EU's neighbourhood;

II) The Five Year Work Programme, approved at the Barcelona Summit in November 2005 and which updated and re-defined the approach, followed by the Barcelona 1995 Work Programme;

III) The development of a new pillar of EU-MPC cooperation in the field of Migration, Social Integration, Justice and Security, bringing these issues into the Euro-Mediterranean Partnership since November 2005;

IV) The Union for the Mediterranean launched in July 2008 at the Paris Summit with the progressive establishment of a new institutional structure (Co-Presidency, Secretariat, Joint Permanent Committee), the accession of new Mediterranean Partners and the identification of six concrete region-wide projects;

V) A set of new institutions and structures of a Euro-Mediterranean nature, such as the Anna Lindh Foundation for the Dialogue between Cultures, the Euro-Mediterranean Parliamentary Assembly and the FEMIP (2005), as well as the Euro-Mediterranean University (2008) and the Euro-Mediterranean Local and Regional Assembly, due to be created in January 2010.

According to the 1995 Barcelona Declaration, 2010 is the target date for the completion of the Euro-Mediterranean Free Trade Area. A Summit of the Union for the Mediterranean is planned for the first half of that year in Barcelona in order to define the agenda for the coming years. Moreover, the economic crisis which began in 2008 and the continuing conflicts in the region impose an on-going rethinking of the EMP.

Survey. In this context, even if the diversity of interests and views of the 371 respondents of the 43 countries of the sample does not always allow for generalizations, the IEMed Survey of Experts and Actors on the Euro-Mediterranean Partnership, carried out between June and September 2009, allows us to establish some features and conclusions about the perceptions, assessments and trends of the EMP and the area as a whole.

A diversifying, little known Partnership. The first one is that, 14 years after its inception, the Euro-Mediterranean Partnership is diversifying into a set of differentiated thematic processes which are difficult to grasp even for experts and actors selected for the Survey. When commissioned to assess the progress of the Euro-Mediterranean Partnership as a whole (in a wide sense, including the European Neighbourhood Policy and the Union for the Mediterranean), we had to prepare a long Questionnaire including 35 articulate questions and more than 400 answer options. The relatively high percentage of "Don't know" answers (in some cases up to 50%) received in the Survey for many questions for detailed assessment of concrete instruments or progress point to the increasing difficulty, even for experts and specialized actors and policy-makers, of keeping track of all these dynamics. In many respects, the Euro-Mediterranean Partnership is migrating from the realm of diplomats and generalist civil

society actors to the remit of specialized ministerial experts and civil society organizations and even interest groups. This should also encourage policy- and decision-makers in the Euro-Mediterranean Partnership to invest more in the visibility of the EMP actions and dissemination of results, but even more so in bringing these actions closer to the interests and worries of MPCs.

A differentiated interest in the EMP. The rate of responses received to the Survey (see Annex with the sample of the Survey) already reflects a far bigger interest in the EMP in the Mediterranean coastal countries than in the EU non-Mediterranean countries, bigger in the Western Mediterranean than in the Eastern shores of the Sea (i.e., bigger in Maghreb countries than in Mashreq countries and Turkey and bigger in France, Italy and Spain than in Greece, the island Mediterranean States and the Balkans).

A different degree of commitment of EU Member States. Results of Question 1.9 on the commitment of EU Member States are not surprising, but they are revealing. The three countries most committed to the EMP, in the view of experts and actors who answered the Survey, are, in this order, Spain, France and Italy (followed by Sweden). This might reveal that the period 2008-2010 will provide a unique combination of EU Presidencies very favourable for the development and deepening of the EMP, an opportunity which might take a long time to emerge again. At the other extreme of the spectrum, the new Eastern European Member States are perceived as the least committed to the EMP (Slovenia is the only exception). Taking into account the increasing institutional weight of those countries in the EU, this puts a major question mark over the future of EU-Mediterranean relations.

A mature, nuanced general assessment of the EMP. The general assessment deriving from answers to questions on perceptions and results lead to the conclusion that the assessment of the EMP after fourteen years of operations shows a high concentration of responses (close to 50% in both cases) around the median values (4 to 6 on a 0-10 scale, not very disappointing but not very positive either) and a relatively similar distribution of the remaining answers on both sides of the spectrum (22% of respondents see the perceptions of the EMP as positive or very positive – 7 to 10 on the scale – and 26% as disappointing or very disappointing). This balanced and at the same time somewhat polarized view of the EMP emerges again in the assessment of the European Neighbourhood Policy and the Union for the Mediterranean, and does not show major variations across respondent categories (i.e., response patterns are very similar across policy-makers, experts from think tanks, universities or media and civil society representatives). But the Euro-Mediterranean Partnership as a *trademark* seems to be in good health: all new projects and initiatives, be it new multilateral programmes within the ENP or new projects and institutions within the UfM, are welcomed by experts and actors with a vote of trust and high expectations about their future performance, revealing a widespread engagement with the Euro-Mediterranean Partnership as a project and as a process.

A more negative perception in MPCs. This notwithstanding, perceptions about the performance of the Euro-Mediterranean Partnership are far more negative among Southern and Eastern Mediterranean respondents than among EU ones, and more negative in the Maghreb (Algerian respondents show the most negative assessment on most of the dimensions) than for Mashreq respondents.

Difficulties and obstacles. There seems to be a wide consensus on the magnitude of the difficulties that prevent the achievement of the EMP objectives. According to the majority perception of the respondents, the EMP (including the UfM) is seriously endangered by the persistence of the Arab-Israeli conflict (73% of respondents). 63% of respondents consider it probable or very probable that the EMP will be paralyzed by this conflict in a mid- to long-term perspective. This should mean that either the conflict is settled in the near future (respondents are not optimistic about it) or the EU should reconsider the possibilities of success of a mul-

tilateral cooperation scheme comprising both parts of the conflict. The two other obstacles to the achievement of the objectives of the EMP most often mentioned are the weak political will for reform in Mediterranean Partner Countries (mentioned by 43% of respondents) and the lack of South-South integration (43%).

Beneficiaries. When one undertakes a more detailed analysis of the Euro-Mediterranean Partnership by priority areas, it is interesting to note the relative high appreciation of the EMP action in the cultural and education fields and the people-to-people programmes (once dubbed the “poor parent” of Euro-Mediterranean cooperation), but also that respondents consider that the Euro-Mediterranean Partnership is mainly benefiting the business climate and economic interests, but without this translating into job creation, women's integration into economic life or a convergence towards EU income levels. This should give a clue as to what should be prepared for the future, but contrasts with the very negative perceptions about progress in the field of mobility.

European Neighbourhood Policy. Answers on the assessment of the results of the ENP show a very similar assessment to that for the EMP. This seems to indicate a consolidation of the ENP as the bilateral instrument of EU cooperation with MPCs.

New ENP multilateral programmes (TAIEX, Twinning, Neighbourhood Investment Facility, Governance Facility launched) are still largely unknown (high level of “Don't know” answers, up to 40% of the answers in some cases). Assessment of their implementation is balanced to positive, with typically less than 20% of respondents considering them disappointing or very disappointing (0-3) and slightly above 25% considering them positive or very positive (the assessment of the Governance Facility is more negative).

Union for the Mediterranean. Despite all polemics about its inception and its political blockade, answers to the question about the contribution of the general objectives of the UfM to the achievement of the objectives of the EMP still show a moderate optimism, with, depending on the aspect considered, between 35% and 50% of respondents thinking that it will make a positive or very positive contribution and less than 25% attributing it with a negative or very negative contribution. Also, the contribution of the new UfM projects approved in the framework of the UfM to the achievements of the objectives of the EMP is assessed positively by most of the respondents (more than 60% see a positive or very positive contribution of the Mediterranean Solar Plan and De-pollution of the Mediterranean, and between 50% and 60% for the other four projects).

Coherence and articulation. The assessment is much less positive, however, when respondents are asked for the coherence and articulation between the different layers of EU-MPC cooperation: the EMP, ENP, UfM and EU enlargement process. Here, the results point to a clear perceived lack of coherence: 48% detect certain or total lack of coherence (0 to 3 on the scale), whereas only a meagre 11% see coherence between those different schemes.

Institutions. Concerning the **UfM Co-Presidency system**, respondents have a cautious and divided but not too negative view of how effective it has been in strengthening a true partnership and ownership. 30% of respondents think that it has been effective or very effective (7-10 on the scale), whereas 31% consider the Co-Presidency system has been ineffective or very ineffective (0-3 on the scale).

The work of the **Euro-Mediterranean Parliamentary Assembly** is judged with less indulgence by the actors and experts surveyed: 30% of them consider it disappointing or very disappointing (0-3 on the scale), against only 18% who consider it positive or very positive.

As for the **Secretariat of the UfM**, expectations about its role in the framework of the Euro-Mediterranean Partnership are quite high, with 52% of respondents expecting it to play an

important or key role in the EMP (7-10 on the scale, 19%, 9-10), and 19% considering that it will play a negligible role (0-3 on the scale).

Resources and funds. Interestingly, in the view of many of the respondents of the Survey, the lack of financial resources is not a major obstacle for the achievement of the objectives of the EMP. 38% consider the current level of budget appropriation of the ENP insufficient or very insufficient (0-3 on the scale), but only 25% considered the insufficient budget allocation as one major obstacle to the achievement of the objectives of the EMP. At the other end of the spectrum, 21% of respondents consider them sufficient (7-10 on the scale), and often indicate that the problem is the use and effectiveness of resources, rather than their volume, as shown by the perceived lack of progress in maximizing the impact and leverage of scarce resources (71% see no progress or even regression). It is the respondents of Maghreb and Mediterranean EU countries who tend to consider resources insufficient with a higher frequency, while Mashreq and non-Mediterranean EU countries consider it sufficient.

Participation of women. Despite certain improvements, actions undertaken by the EMP and the ENP to promote the participation of women in economic, social and political life are not satisfactory: 27% consider it disappointing or very disappointing (0-3) against only 19% positive or very positive (7-10). Interestingly, the view of female respondents is slightly more positive (23% disappointing against 21% positive). The level of involvement of women in the EMP is assessed even less positively: 32% assess it as low or very low and only 18% as high or very high. The negative perception of respondents about the actions of the EMP in promoting women may explain why the only multilateral programme specifically addressed to cope with gender issues (Role of Women in Economic Life) is assessed in a very positive way.

Assessment of progress of MPCs. As for the progress and commitment of specific Mediterranean Partner Countries, overall only Morocco and Tunisia, and to a lesser extent Jordan, seem to pass the mark. Syria, Algeria and Palestine get very negative results with a very high percentage of very disappointed respondents (respectively, 25%, 15%, 21% and 23% in the 0-1 bracket). Morocco stands out in all areas (political and socio-economic, in particular), followed by Lebanon in the political field and by Tunisia in the economic and social one.

Turkey. More than 55% of respondents are very positive about the fulfilment of the political and economic criteria for the EU accession of Turkey. Logically, a high proportion of respondents expect Turkey to join the EU as a full Member State “in the next 20 years”: 55% consider it probable or very probable (7-10) and only 22% see a very low probability or no probability at all (0-3) that it will effectively happen.

Successes and failures. The Survey offers a clear picture of what has worked and what has not in the Euro-Mediterranean Partnership.

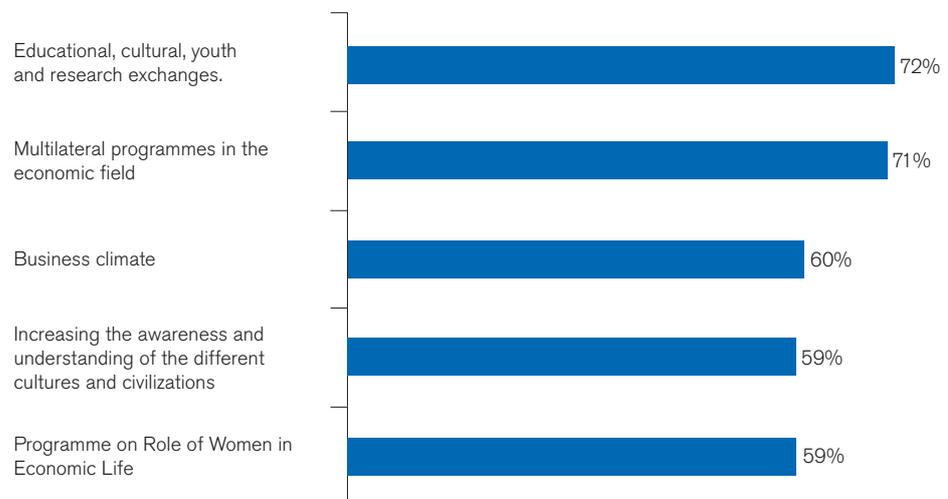
Successes of the Partnership:

- **Business climate.** 60% of respondents consider that there has been progress in improving the business climate for SMEs in the MPCs. And Business-to-Business contacts are considered a success (73% see “Progress”, against 27% who see “No progress” or even “Regression”). The same overly positive assessment applies to enhanced support for reforms and efforts to improve trade and the economic regulatory environment (66%-34%).
- **Multilateral programmes in the economic field:** 71% of respondents stated that there has been progress in the Technical assistance and risk capital support programme of FEMIP, 70% in transport and energy cooperation, 69% in relation to the development of the information society (Medibtikar, Innovation and Technology), and 65% in investment promotion (ANIMA and Invest in Med). 59% make the same assessment in relation to environmental programmes.

- **Increasing the awareness and understanding of the different cultures and civilizations.** 59% of respondents consider that there has been progress in this area.
- **Educational, cultural, youth and research exchanges are also very positively assessed (72%-28%).** All multilateral programmes in the education and social exchanges field are considered to have experienced progress by between half and two thirds of the respondents, in particular those on dialogue between cultures and cultural heritage (Euromed Heritage, Anna Lindh Foundation) (68%), the one on Information and Communication II (68%) and Euro-Med Youth (59%, particularly appreciated by women respondents, 70%) and the one on Gender Equality (59%).
- **Programme on the Role of Women in Economic Life (2006-2008, €5 million),** with 59% of respondents stating that there has been progress in this regard.

Sucesses of the EMP

% of respondents considering that there has been progress



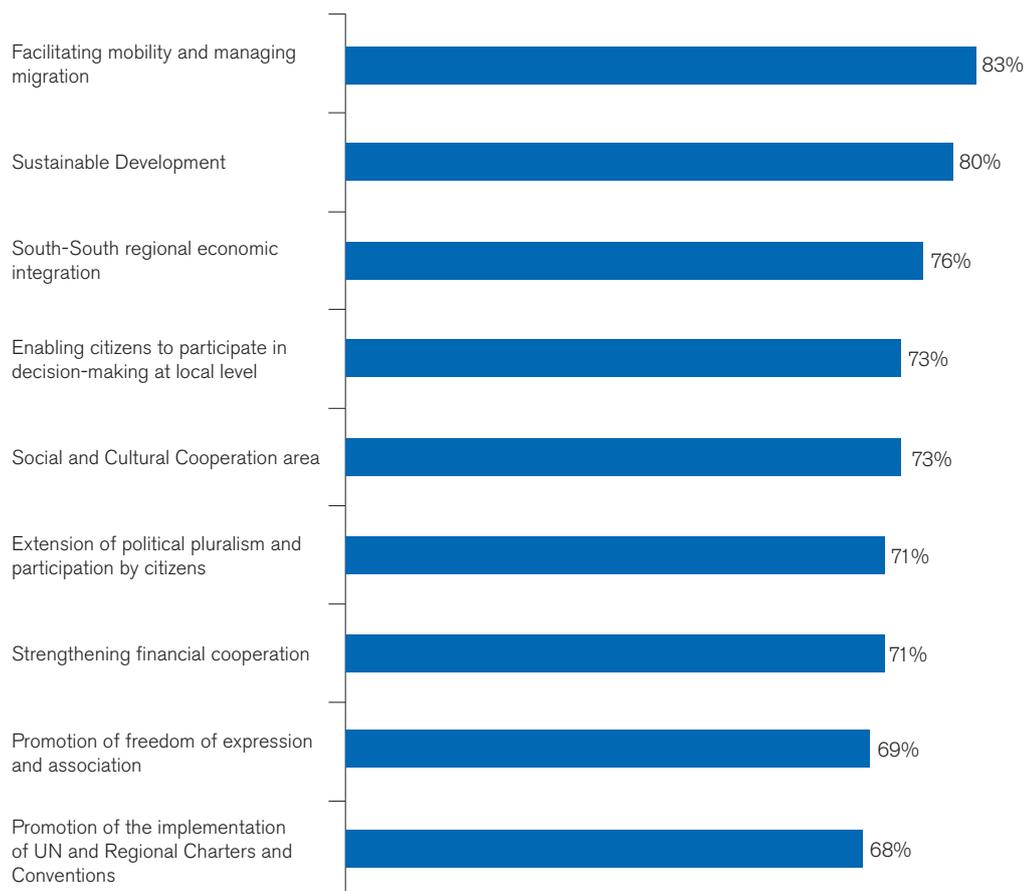
Failures of the Partnership:

- **Enabling citizens to participate in decision-making at local level.** Assessment of progress is rather negative in relation to all the objectives stated in the 2005 Five Year Work Programme. Indeed, 73% of respondents considered that there has been no progress or even regression as far as enabling citizens to participate in decision-making at the local level is concerned, 71% for extension of political pluralism and participation by citizens, 69% for the promotion of freedom of expression and association and 68% regarding the promotion of the implementation of UN and Regional Charters and Conventions.
- **In the sustainable development area,** 80% see no progress or even a regression in reducing the poverty rate, 80% in reducing the prosperity gap and raising GDP growth rates to reduce the prosperity gap (even a larger percentage in Mashreq countries) and 76% see no progress or a regression in the creation of job opportunities for young people.
- **Strengthening of financial cooperation,** in particular maximizing the impact and leverage of scarce resources (i.e., the issue of efficiency, where 71% see no progress or even regression).

- **South-South regional economic integration.** Whereas regional programmes are in general very positively assessed, the multilateral programmes aimed to promote South-South regional economic integration (in particular the Agadir Agreement) must be considered as a serious failure (76% see no progress and 7% a regression).
- **In the social and cultural cooperation area,** respondents consider that there has been no progress or even regression in reducing disparities in education achievement between European and Mediterranean States (73%), in enhancing graduate employment through efficient, high quality higher education (70%) and in promoting equitable access to quality education (61%).
- **Cooperation in the migration and justice and security area:** 50% of respondents consider it disappointing or very disappointing (0 to 3 on a 0-10 scale), against only 6% considering it positive or very positive (7-10).
- **Facilitating mobility and managing migration** (with 83% seeing no progress or even regression for visa facilitation, and slightly less for readmission and border management). Asked to assess progress in the justice and home affairs area, 83% see no progress or even regression in addressing the “brain drain” caused by migration, 71% in significantly reducing the level of illegal migration and trafficking of human beings and 69% in promoting legal migration opportunities.

Failures of the EMP

% of respondents considering that there has been no progress or regression



Prospects. Finally, a forward-looking analysis of trends and key factors for future scenarios in the Mediterranean shows that, according to respondents, prospects in the Mediterranean are decidedly bleak. More than 50% of respondents consider it probable or very probable that:

- the Arab-Israeli conflict will paralyse the EMP (63%, with the exception of Israeli respondents, where it is only 40%),
- water scarcity will become a source of conflicts and social tensions (61%),
- population and employment pressures will create dramatic social tensions (50%), and
- political regimes in MPCs will show continuity (50%).

As a consequence, irregular migration to Europe will continue to increase (50% see it as probable or very probable), and 47% of respondents consider it probable or very probable that the increased level of irregular migration will intensify social tensions and xenophobia in Europe, so that 35% see it as improbable or not probable at all that a common Mediterranean identity will emerge (against 20% attributing some probability to it).

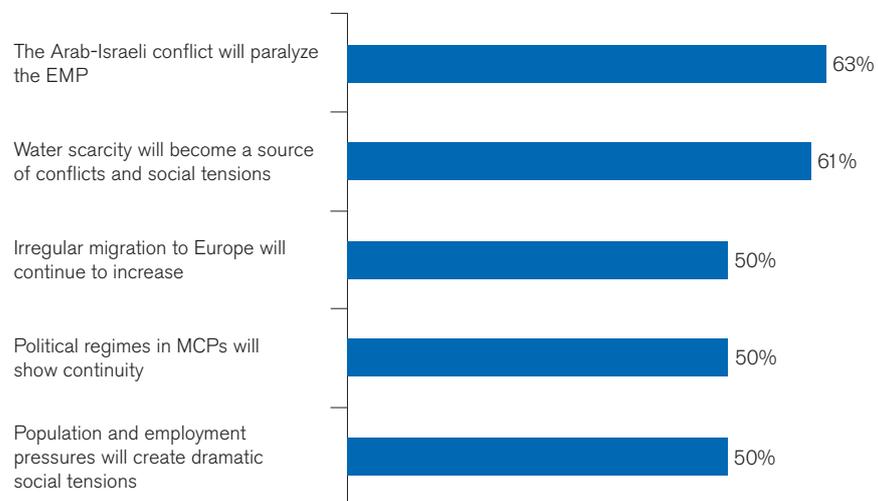
The “probable or very probable” answers double the “improbable or not probable at all” answers regarding the probability of:

- an environmental deterioration in the Mediterranean threatening the living conditions and economic activities of riparian States (39% against 15%),
- the current global economic crisis reducing the development prospects of the Mediterranean for a long period (38% against 17%), which of course means that respondents consider it improbable or not probable at all that MPCs will sustain the increased level of economic growth achieved in the last three years, and hence long-term convergence to EU income levels (40% against 13%).

The only positive development that will probably materialize in the future, according to the respondents, is the increased participation of women in economic, social and political life in MPCs (38% consider it probable or very probable against only 14% improbable). Overall, it is clear that respondents consider that current trends and the status quo are not sustainable in the mid- to long term.

Prospects

More than 50% of respondents consider it probable or very probable that:



EMP contribution to facing challenges in the region. Faced with these challenges, the answers regarding the probability that the Euro-Mediterranean Partnership will contribute to solving the problems in the region show that:

- 45% of respondents see low or no probability of it leading to resolution of conflicts in the region (only 19% see certain or high probability of this happening), and
- 41% think the same for a reduction of the development gap across the Mediterranean (27% are positive about that probability).

In contrast, for the whole sample the balance is clearly in favour of the Euro-Mediterranean Partnership leading to:

- a greater intensity of human exchanges across the Mediterranean (39% see it as probable, against 21% improbable), and
- a greater understanding and respect between cultures and religions (43% against 18%).

Priorities. As far as priorities for the future are concerned (in particular for the 2010 Work Programme to be approved in the Summit of the UfM to be held in Barcelona in June 2010), among the 20 possible action priorities submitted to respondents, the most often mentioned amongst the five top priorities are the following:

- Conflict resolution in the region (62% of respondents),
- Promotion of democracy and political pluralism (49%),
- Water access and sustainability (41.5%), and
- Education (41%).

The least cited priorities include civil protection (only 18% of respondents mention it amongst the five top priorities), a wider free trade area, liberalisation of EU agricultural markets and food security (20% each), the fight against international terrorism and creation of an area free of weapons of mass destruction in the Mediterranean, as well as establishment of free movement of persons in the Mediterranean (21% each), as well as the management of migration flows and the promotion of equality between men and women (22%). This should give rise to some thoughts about the priority projects for the EMP and the UfM. However, regional differences across respondents are paramount as far as priorities are concerned.

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Priority Prospects (as % of respondents)

