

Euromed Survey 2010: Assessment of the Euro-Mediterranean Partnership/Union for the Mediterranean 2008-2011 and Prospects for 2012

Jordi Padilla
Xavier Aragall

Euromed Policies Department
European Institute of the Mediterranean (IEMed),
Barcelona

In light of the success of the first edition of the Euromed Survey, the report for which was widely disseminated, this article presents some of the main highlights from the second edition, which corresponds to 2010. Although the fieldwork for the survey was conducted between October and December 2010, that is, prior to the convulsive events that have recently rocked the Southern Mediterranean, the analysis and interpretation of the survey results take into account the new scenarios unfolding in the region and strive to identify the relationships with them.

Some 598 experts, policymakers and members of civil society from all 43 Member Countries of the Union for the Mediterranean (UfM) participated in this edition of the survey, answering the questionnaire between November and December 2010. The questionnaire included a total of 31 general questions divided into three thematic blocks and paid special attention both to the main features of Euro-Mediterranean policy and to economic and financial issues (specifically, the Euro-Mediterranean Free Trade Area (EMFTA), including, among other things, the liberalisation of services and agricultural products, sustainable development, energy and water).

The responses received provided a balanced and representative sample from both the Southern and Northern Mediterranean (44% and 54%, respectively). Likewise, the responses from Mediterranean Partners Countries (MPCs), which, for the purposes of this analysis, include all Member Countries of the Euro-Mediterranean Partnership (EMP) and

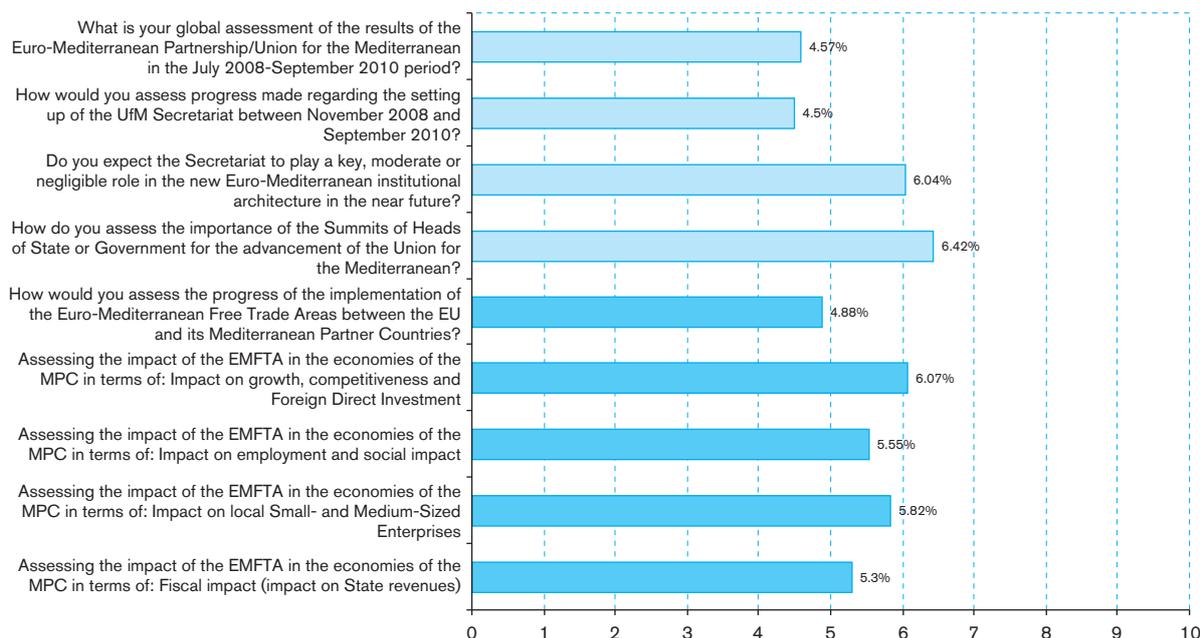
UfM, and from the 27 Member States of the EU accounted for 49% and 47.3%, respectively.

Euro-Mediterranean Partnership/Union for the Mediterranean 2008-2011: Satisfactory Planning and Relevance, Lacklustre Implementation

The global assessment of the Euro-Mediterranean process was not as positive as the view of the potential of the Euro-Mediterranean institutions. Respondents' opinions in these areas showed that experts and actors are still willing to give the construction and development of the EMP/UfM's institutional architecture the benefit of the doubt with regard to its eventual full operational deployment. There was no consensus regarding the assessment of the implementation of the free trade area (FTA). However, the respondents generally felt that the implementation of the FTA had had a more positive impact on the growth and competitiveness of MPCs, in particular, than on areas such as employment, on which its impact was deemed to have been minimal.

As for the sectorial strategies, the Euro-Mediterranean action plans and the six projects launched under the UfM, respondents took a twofold approach: while they were critical or very critical of the progress made on the implementation of the different programmes, they were also uneven in their assessments, revealing a notably positive trend with regard to the assessment of the suitability or relevance of the projects themselves or their relevance within the framework of the Euro-Mediterranean objectives.

In general, the Euro-Mediterranean strategies and action plans suffer from a lack of visibility, as witnessed by the significant share of survey-takers



who were not familiar with them. Those who did know them considered them to be quite important to achieving the EMP's objectives. However, when the survey questions turned to the actual progress made on these plans and strategies in recent times, respondents revealed an even more acute lack of knowledge. More than 50% of the survey-takers believed progress had been made on only two plans: the Istanbul Plan to Strengthen the Role of Women and the Priority Action Plan on Energy. At the other end of the spectrum, 80% of survey-takers believed that no progress had been made or regression had occurred on the Employment Framework of Actions, which has indeed been severely hampered by the current economic situation.

The global assessment of the Euro-Mediterranean process was not as positive as the view of the potential of the Euro-Mediterranean institutions

As for the UfM projects, their importance was undisputed: all received very high scores. However, they have not all advanced at the same pace. More

than 50% of the survey-takers believed that progress had been made on only two of the six projects: the Mediterranean Solar Plan and the Euro-Mediterranean University (EMUNI). The stumbling blocks encountered setting up the Secretariat have undeniably affected the projects. The projects most likely to be viewed as having experienced greater progress were those that have taken on clearly defined forms.

The Euro-Mediterranean Free Trade Area: A Mixed Impact in an Inhospitable Environment for Economic and Financial Cooperation

The thematic dossier of the second edition of the survey focused on the 2010 implementation of the EMFTA and on Euro-Mediterranean economic and financial cooperation. At the economic level, it is worth noting, first, that the global economic crisis has engendered a certain degree of pessimism among the survey-takers with regard to the future prospects for Euro-Mediterranean cooperation. Given a choice of seven possible outcomes of the current economic crisis, the survey-takers most frequently believed that the EU would tend to turn inward and seek to resolve its own problems, closing itself off to the outside world and failing to integrate the MPCs into its economic strategies.

CHART 16

Assessment of the Sectoral Strategies and Euro-Mediterranean Action Plans

Panorama
Med.2011

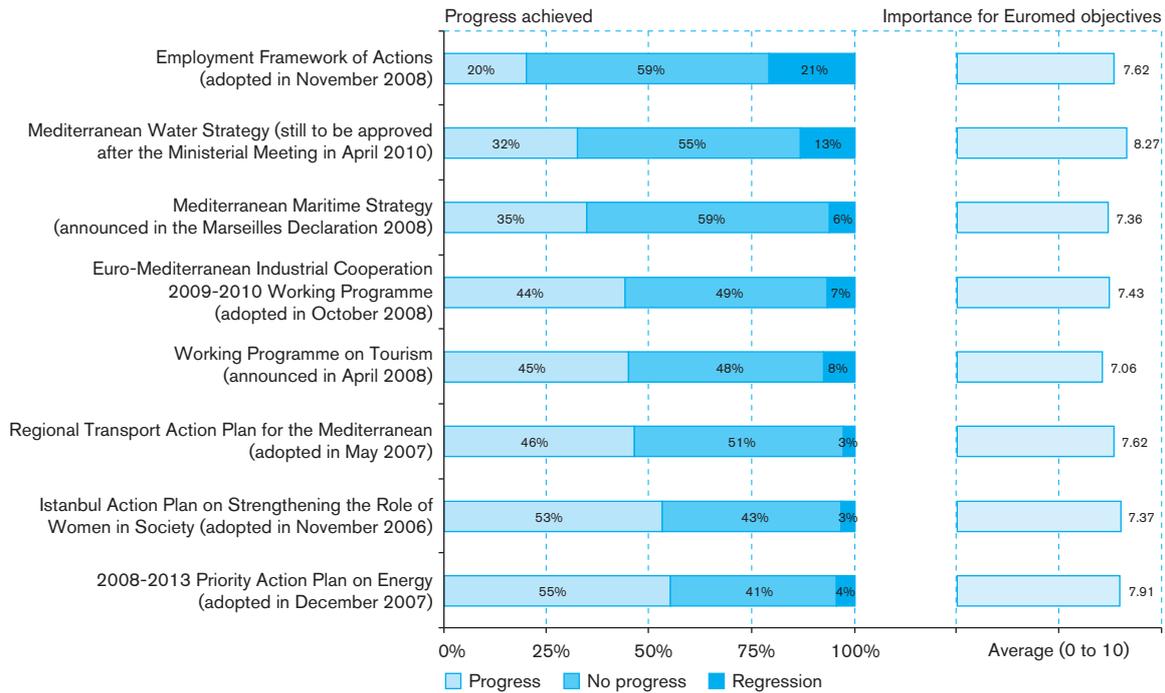
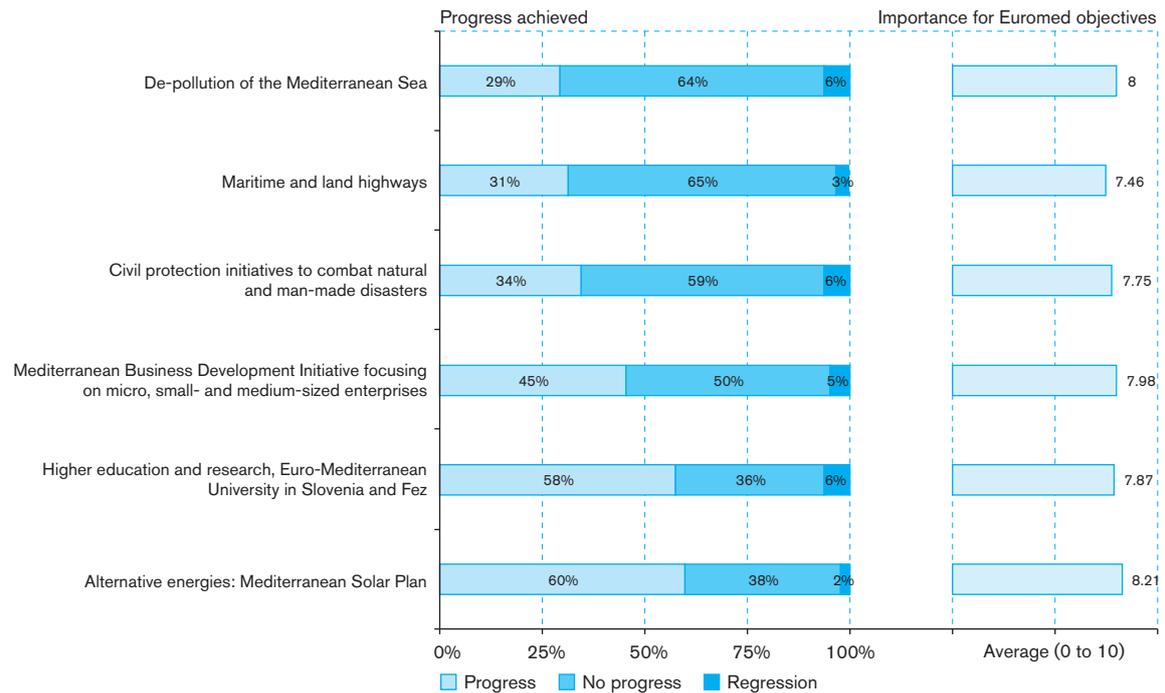


CHART 17

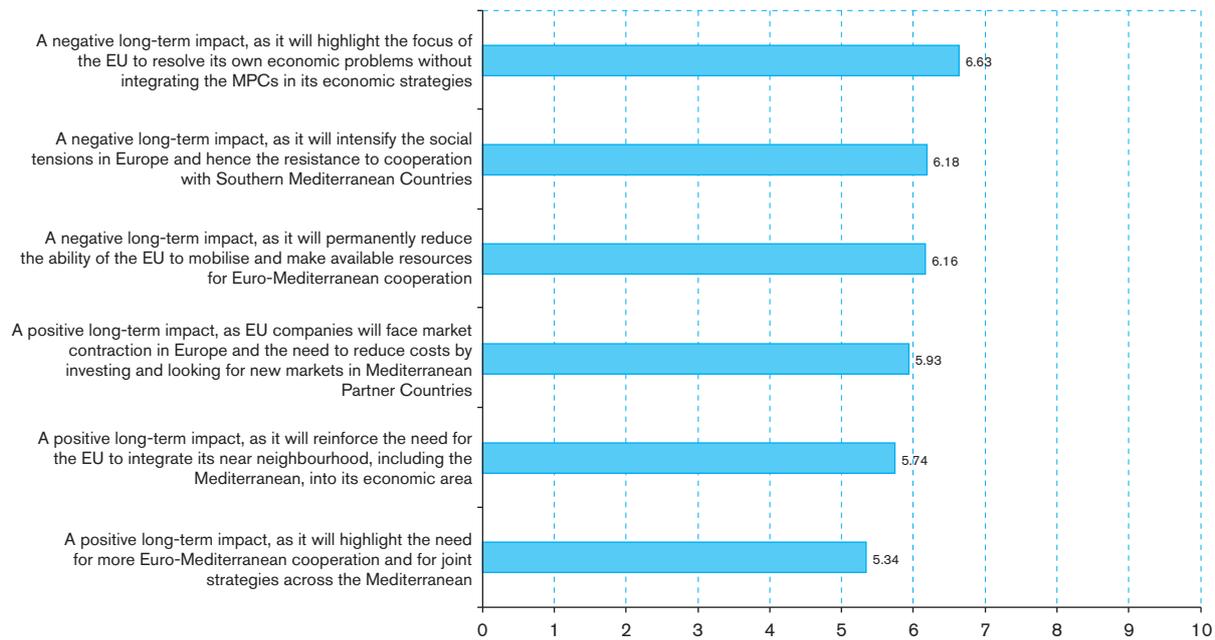
Assessment of the Progress Made on the Six Projects Chosen to Date within the Framework of the UfM

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Additionally, there was no clear consensus among the survey-takers as to whether significant progress had been made on the implementation of the general free trade area (FTA). In contrast, when asked about the implementation of the specific FTAs with each MPC, survey-takers had a clear

idea of which countries had made the most progress and which countries the least, giving rise to three well-defined blocks of countries depending on the status of the implementation process for their individual FTAs: the first block, corresponding to countries with very high scores, notably and sig-



nificantly includes those countries that have done most to implement their FTA (Tunisia, Morocco and Israel); the second block is comprised of countries receiving high scores (Jordan, Egypt and Lebanon); and, finally, the third group includes Palestine and Algeria, which have made only moderate progress. Also worth noting with regard to this section of the questionnaire is the fact that the survey-takers believed that the implementation of the FTA has had a positive impact, especially on the growth and competitiveness of the MPCs, as opposed to on areas such as employment, on which it is seen to have had only a minimal impact (see Chart 15).

South-South integration received a failing mark with regard to the implementation of the different initiatives intended to help achieve it. Nevertheless, within this context, the Agadir Agreement was rated higher than GAFTA and far higher than the UMA

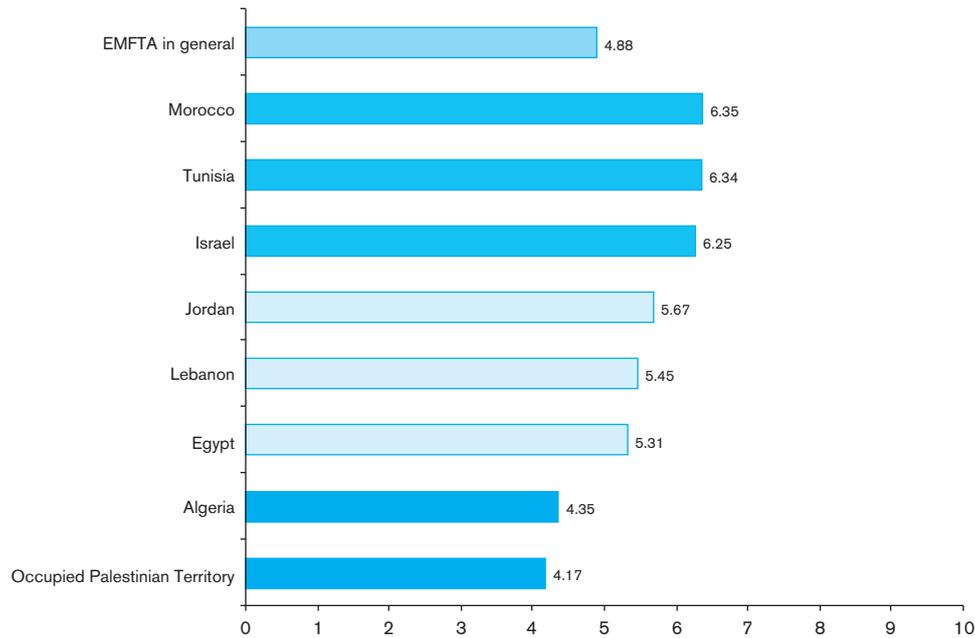
Specifically, for the survey-takers, the FTA has had a greater impact on growth and competitiveness (6.1

on average) or small and medium-sized enterprises (5.8) than on employment (5.6) or State revenues (5.3), although in all cases the impact was considered to have been positive. In the case of Turkey, the impact of the customs union on these same areas followed the same order, although the individual scores were significantly higher.

Attention should also be drawn to other aspects related to the thematic dossier on economic and financial cooperation, including: South-South integration, agriculture and services, and financial cooperation.

South-South integration, an essential component of a true Mediterranean free trade area, received a failing mark with regard to the implementation of the different initiatives intended to help achieve it. Nevertheless, within this context, the Agadir Agreement was rated higher than GAFTA and far higher than the UMA. Additionally, the survey-takers viewed the agreements between Turkey and certain MPCs as an efficient mechanism for achieving the FTA, especially survey-takers from the MPCs themselves.

In the sphere of agriculture and services, the scores given to the progress on the negotiations to liberalise trade in services and agricultural products did not encourage optimism, particularly given that the lowest scores came from the MPCs. Although the survey-takers as a whole believed that agricul-



tural liberalisation would have a positive aspect on both the MPCs and (to a lesser extent) the EU, they also believed that full liberalisation is unlikely to occur. In this context, the way forward will require establishing the deep and global free trade areas envisioned with the MPCs, as, according to survey-takers from both the Northern and Southern Mediterranean, they provide high added value.

Finally, with regard to financial cooperation, the effectiveness of financial cooperation in the form of bilateral assistance under the European Neighbourhood and Partnership Instrument (ENPI), as well as financial cooperation provided in the form of direct budget support, received mildly positive scores, with the assistance provided under the ENPI being rated slightly higher. It is worth noting that survey-takers from the Mashreq rated the effectiveness of the ENPI most highly, while non-Mediterranean Europeans gave a negative score to direct budget support.

Priorities

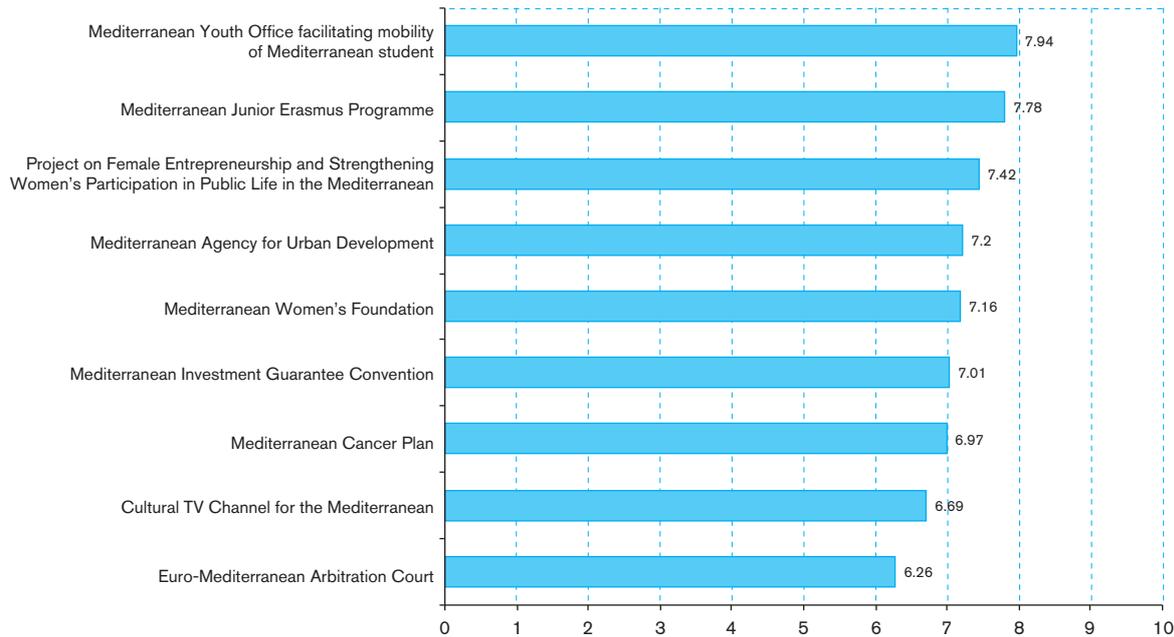
When the survey questions turned to those issues deemed to be most neglected by the EMP/UfM, or those on which progress should be made a priority at the EMP or UfM project level, the initiatives linked to young people and education received the high-

est scores. When this result is viewed in conjunction with the perception that the FTA has not had a significant impact on job creation, three variables (young people, education and employment) emerge that are critical both to the analysis of the survey and the explanation of the uprisings and democratic transitions now sweeping the Southern shores of the Mediterranean. These results and their interpretation in light of the current transformations should make it possible to establish priority action lines to reorient the current process of Euro-Mediterranean regional integration.

Future scenarios

Economic and financial cooperation is one of the main objectives of the process of Euro-Mediterranean integration. Now that the deadline set for the creation of the FTA has come and gone, it is safe to say that it has only been partially implemented and that not all parties view its impact in the same way.

However, in addition to the foregoing, two issues directly affect the fulfilment of this objective. First, according to the survey-takers, the global economic crisis will affect the implementation of the FTA by leading the EU to abandon its current eco-



conomic strategies. Second, the unrest now sweeping the Arab world, despite having begun after the fieldwork for the survey had been completed, has given rise to two new factors that can be seen in the qualitative reports on the survey.¹ On the one hand, given its association with a change in value systems, the depth of the movement that began in Tunisia may put an end to the liberal consensus that enabled the launch of the Barcelona Process. That consensus, which prioritised economic development over democratic reform, has proven unable to accept that the governing elites in the MPCs were anything but reformers and that they directly or indirectly appropriated the financial mechanisms for Euro-Mediterranean cooperation. On the other hand, while the result of the uprisings is eminently political, they have a clear socio-economic basis in the increase in inequality and social injustice and, thus, the implementation of the reforms and economic cooperation intended to facilitate the transition to a free trade area should be reviewed in order to increase their credibility and effectiveness.²

Conclusions

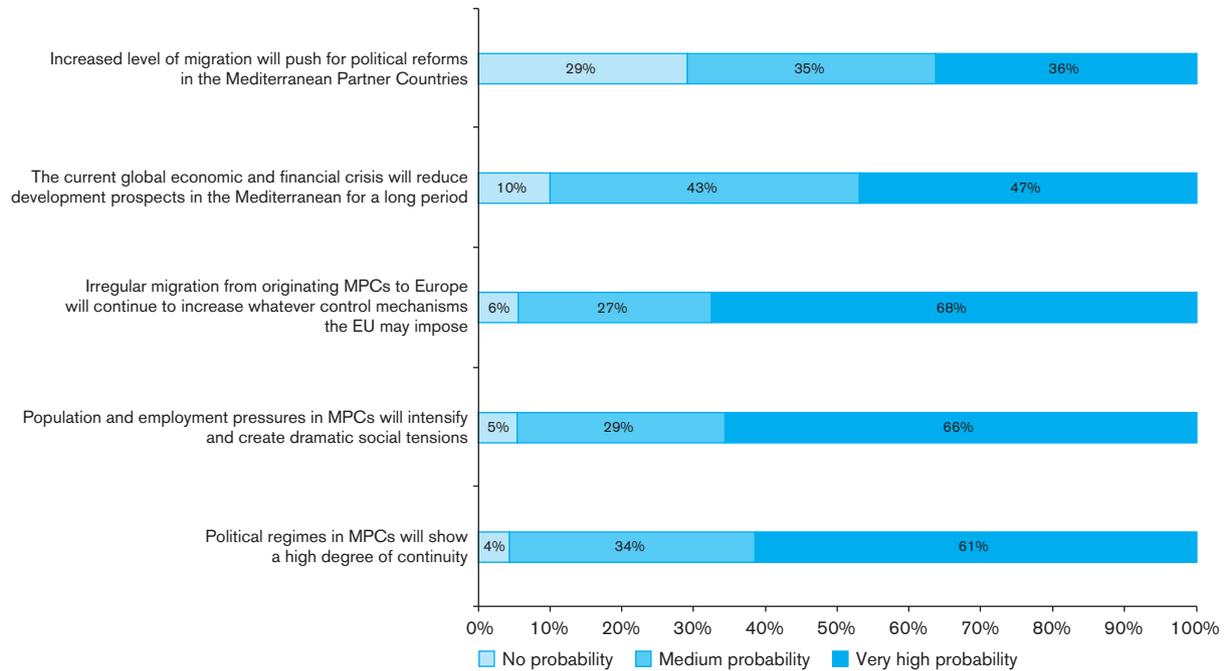
In conclusion, as part of a general reflection on the survey and its interpretation, one must ask how it is that none of the participating experts managed to detect or predict anything resembling the changes that have taken place, above all, in Tunisia and Egypt. No one detected the pre-revolutionary situation, despite the impending nature of the events, and for many of the questions concerning the outlook for the future, respondents gave the same answers as in the 2009 edition and, in some cases, even took more optimistic views. In any event, the answers received may point to a significant gap between the problems and expectations of the people and the points of view of the experts and policymakers.³

However, the results also reveal the detection of the serious short- and long-term challenges facing the region and, in particular, its people (impact of the crisis on development, social tensions resulting from structural unemployment, continuing irregular migration), as well as the strong likelihood that the current political regimes will remain in power and, thus,

¹ SCHMID, D. "Après le 'printemps arabe' : faut-il repenser l'ordre euro-méditerranéen ?" in *Euromed Survey 2010*, Results Report, IEMed: Barcelona (in press).

² *Ibid.*

³ CORDET-DUPOUY, A. "Transition au Sud de la Méditerranée : une chance pour une meilleure coopération entre deux rives ?" in *Euromed Survey 2010*, Results Report, IEMed: Barcelona (in press).



that the detected and diagnosed problems will not be effectively tackled and resolved. More than revolutions, the responses seem to indicate a resigned acceptance of a situation that is unlikely to change.

The new panorama of democratic reforms and transitions opens the door for a similar reformulation of Euro-Mediterranean relations, one that moves beyond the mere setting of objectives that are more rhetorical than real and, above all, fully capitalises on and maximises the role of the UfM

However, the new panorama of democratic reforms and transitions opens the door for a similar reformulation of Euro-Mediterranean relations, one that moves beyond the mere setting of objectives that are more rhetorical than real and, above all, fully capitalises on and maximises the role of the UfM. In other words, it paves the way to putting the new institutional architecture and instruments intended to re-launch the EMP at the service of these transitions, whether through the institutional strengthening entailed by the creation of the UfM's Secretariat General and co-presidencies, in terms of charting a course towards a new framework in which the MPCs are truly on an even footing with their European counterparts, or through specific projects that serve as a backbone for the Union.