

QUALITATIVE ANALYSIS



Failed? Reformable? What is needed? – What future for the European Neighbourhood Policy in the Mediterranean?

Michael A. Köhler

Senior Associate Fellow IEMed. Professor for Europe and the Mediterranean, College of Europe, Bruges.

On 1 May 2004 ten new member states completed their accession to the European Union, enlarging the Union from 15 to 25 members, with two more countries – Romania and Bulgaria – still waiting on the sidelines to be admitted to the Union only three years later, in 2007. Already almost two years earlier, the EU's first High Representative on Foreign and Security Policy Javier Solana and his colleague in the Commission, external relations Commissioner Chris Patten, in their joint "Wider Europe" letter of 7 August 2002 had sketched out a new policy framework for the enlarged Union's future relations with its immediate neighbours (Tocci, 2004). This was further refined in 2003 and 2004 on the basis of proposal made in two Commission Communications, to become known as the "European Neighbourhood Policy" (ENP) (Commission 2003 and 2004).

While initially focusing on establishing a partnership with European countries outside the enlarged European Union located east of Poland and the Baltic Republics, which would share a border with the Union following its 2004 enlargement, the ENP concept was soon extended to include also EU's neighbours both in the South-East – in the Southern Caucasus – following the 2003 Rose Revolution in Georgia and in the South, i.e. the EU's Mediterranean partners. They were already linked to the European Union through a series of Association Agreements concluded in the five to ten years before and in particular through the Barcelona Process that since 27/28 November 1995 had become the setting for a Euro-Mediterranean Partnership.

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establish a 'ring of [EU] friends', not the least from the South, that would share everything with the Union except its institutions (Prodi, 2002).

From the outset, the new approach was met with considerable questions in the Mediterranean region, such as: What would be the relationship between the new policy and its governance architecture on the one hand and the – partnership-driven – structure of the Barcelona Process with its strong regional focus that the EU-15 and their 13 Mediterranean neighbours had formed not even nine years earlier? Would it be appropriate, and was there enough in common, to deal with the Southern and the Eastern Neighbourhood together under one common European Neighbourhood umbrella? If enlargement policy was bound to prepare the way to EU accession, what would be the final objective of cooperation under the European Neighbourhood Policy? Was the new policy approach too euro-centric and inspired by the proven EU method of pre-accession partnership to be adapted to the complex and diverging realities and perspectives of the countries involved? Was the geographic scope of the emerging ENP appropriate rather than simple and – for the European Union – conveniently based on tradition instead of geopolitical realities (Assessing 2017, Lannon, 2012)?

Undeniably, the launching of the ENP was in itself not only triggered by the massive enlargement of the Union to the East and, with Malta and Cyprus joining the EU and Türkiye starting accession negotiations in 2005, to a lesser also to the South. It was also a reaction to two new game-changing factors that very much distinguished the Euro-Mediterranean environment of 2004 from the one of the Barcelona Foreign Ministers Conference of 1995: (1) the stalemate in the Middle East Peace Process since the return to power of the Likud in Israel and in particular the second Palestinian Intifadha (2000-2005), and (2) the echoes of the 9/11 terror attacks in New York and Washington, including the Iraq war, that introduced a new focus on security aspects into the cooperation with the MENA region and contributed further to the region's fragmentation.

Clearly, in particular for the ENP's Southern dimension the policy's EU enlargement policy heritage proved to be challenging from the start. This does not only relate to the benchmarking methodology, according to which the EU was assessed on an annual basis development and reform progress in the partner countries – as if they were supposed to advance on a mutually agreed EU-integration track – but also to the strict bilateralism of the initial ENP that had very largely renounced any major regional or subregional cooperation ambition and put on the back burner the admittedly complex regional dimension of the Barcelona Process co-decision architecture.

Successive reforms of the ENP endeavoured to address the founding flaws and adjust the ENP's priorities and policy toolbox in order to equip it realistically and therefore better to deal with the challenges in the region and with partner interests – in 2007/8 phasing out some pre-accession elements and launching a new framework for regional cooperation with the Union for Mediterranean, in 2011 reacting to the Arab Spring, and in 2015 taking into account the need to provide for stabilisation given the crises both in the East and the South, growing fragmentation and a differentiation of realities, interests and needs in both sub-regions and the emergence

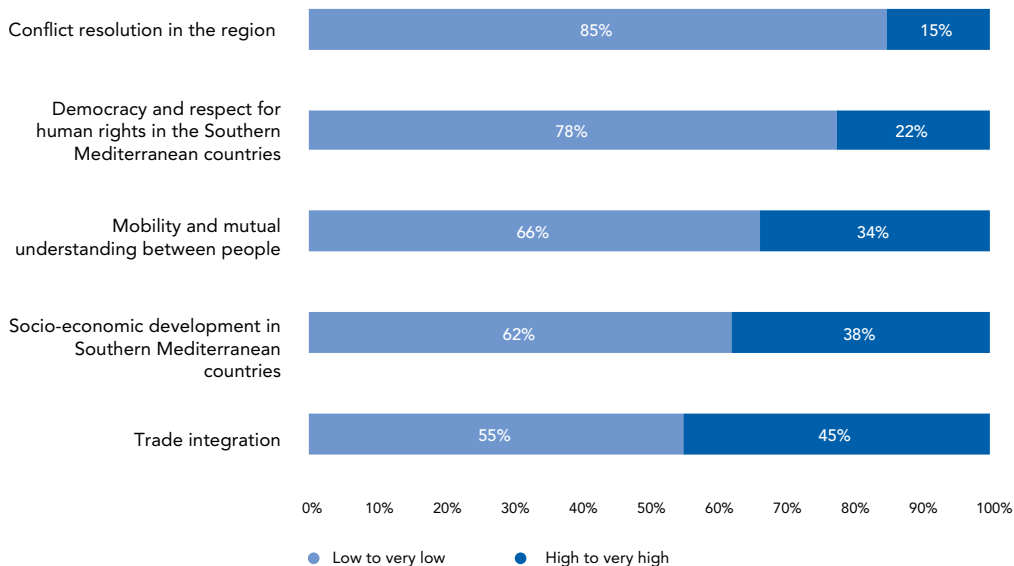
of massive migration flows to Europe from and through the Mediterranean region. In particular, the 2015 reform is noteworthy in this context, not only because of its extent and ambition, but even more so since it was based, for the first time ever, on a four-month long public consultation of ENP stakeholders, including partner countries and regional organisations (European Commission, 2015).

Against the background of this long track record of European Neighbourhood Policy reform and adjustment, the general assessment provided by a rather diverse and heterogenous group of 445 experts consulted in the EuroMeSCo IEMed Survey of the ENP's Southern dimension coming from a vast majority of countries that form part of the policy – regardless of the whether they share a Mediterranean coast or not – offers a rather sobering picture of the policy's effectiveness 20 years into the process:

- Policy impact is considered generally low to very low:

In none of the five key areas (conflict resolution; democracy and human rights promotion; mobility and mutual understanding of people; socio-economic development; trade integration) a majority of experts participating in the survey observes a positive balance of ENP action.

Graph 1: Q.1 The European Neighbourhood Policy (ENP) was designed 20 years ago. It became the structuring framework of Euro-Mediterranean relations. Since then, to what extent do you consider that it has effectively impacted the following areas?



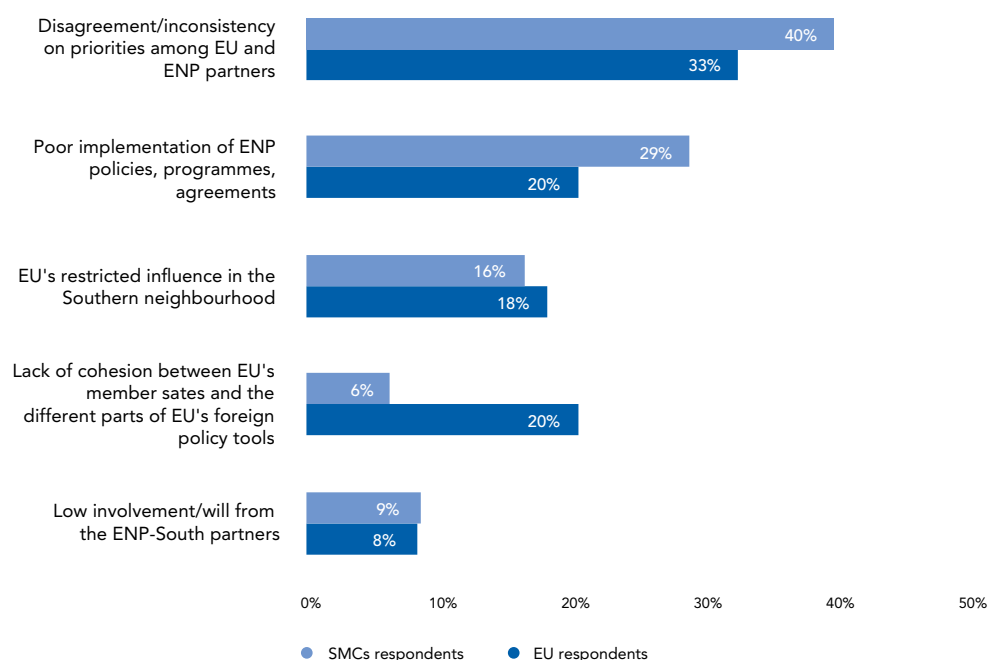
Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

Two features are striking in this regard: Firstly, while respondents' damning assessments of low-level effectiveness of ENP in conflict resolution (85%) and mobility and mutual understanding (66%) can hardly surprise, the policy scores also low in areas where undoubtedly major efforts have been undertaken, such as democracy and human rights (78%) – not only but in particular after 2011 – and both socio-economic development (62%) or trade integration (55%). Secondly, there is no stark difference in the views of either EU- or Southern Neighbourhood-based respondents. EU-based observers tend to be slightly more critical of the policy impact on conflict resolution and democracy/human rights, and slightly more positive on trade integration than experts from the South, but these are nuances that do not change the general impression.

- Disagreement and inconsistency on priorities among EU and ENP partners is seen as the main source of the ENP's insufficient effectiveness:

Again, correspondents from both the South (40%) and the North (33%) seem largely to agree on this finding. The second most common reason for the perceived lack of ENP effectiveness quoted is a perception of poor implementation of ENP policies, programmes, and agreements (29% Southern and 20% Northern respondents).

Graph 2: Q.1b In general terms or in relation to the specific areas mentioned above, why do you think the impact has been limited? (categories developed from open-ended answers)



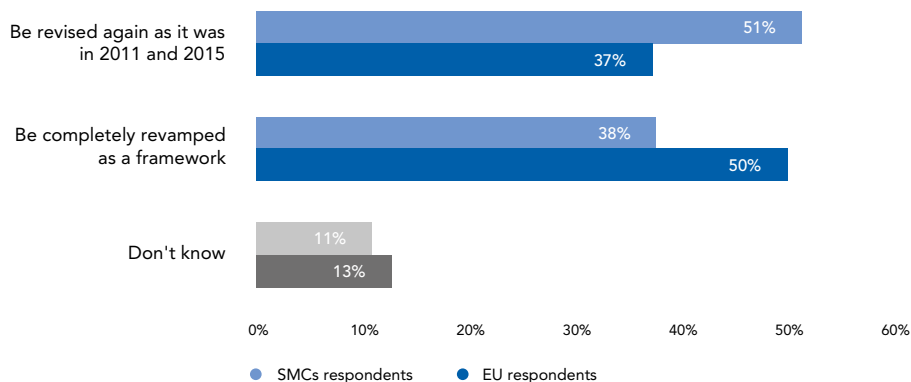
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If we do not want to explain this observation exclusively by assuming a lack of professional capacity on the side of implementing partners, poor implementation has probably to be understood as a function of the first and most prominent reason identified: If ENP partners do not fully agree on priorities and do not ensure their consistency, it is hardly astounding that the implementation of policies, programmes, and agreements will leave something to be desired. Open comments proved by respondents hardly ever refer to technical deficiencies in programme implementation. Moreover, there is also hardly any difference between comments from countries where the EU has applied budget support programmes conditioned on reform progress (such as Tunisia, Morocco, Jordan or Egypt) and those where it has not. Rather than that, respondents repeatedly refer to problems such as differences in policy priorities and interest, a too euro-centric and narrowly EU interest-based approach in the ENP, or even a perception of a neo-colonial attitude, policy inconsistency, and a lack of cohesion between EU and EU member states' policies (observed more by EU experts than those from the South: 20.5% to 6.3%) (see graph 2), as well as an insufficient commitment and a lack of political will on the EU side: in short, a lack of common interest paired with a too imposing and badly communicated EU approach, and a degree of hypocrisy on all sides when referring to common priorities and shared values.

- Consequently, experts demand a new deal:

The verdict is overwhelming: 88% of experts consulted want to see a radical change in the approach, with comparable numbers among them recommending either another revision of the ENP or, more radically, a complete revamp (44% each). While EU-based experts in their majority wish to see a total revamp (50%), Southern Neighbourhood analyst would mainly prefer to see a new policy revision (51%).

Graph 3: Q.2 Since its inception in 2004, the ENP has been reviewed several times. The 2011, 2015 reviews, 2021 New Agenda for the Mediterranean. The ENP should:



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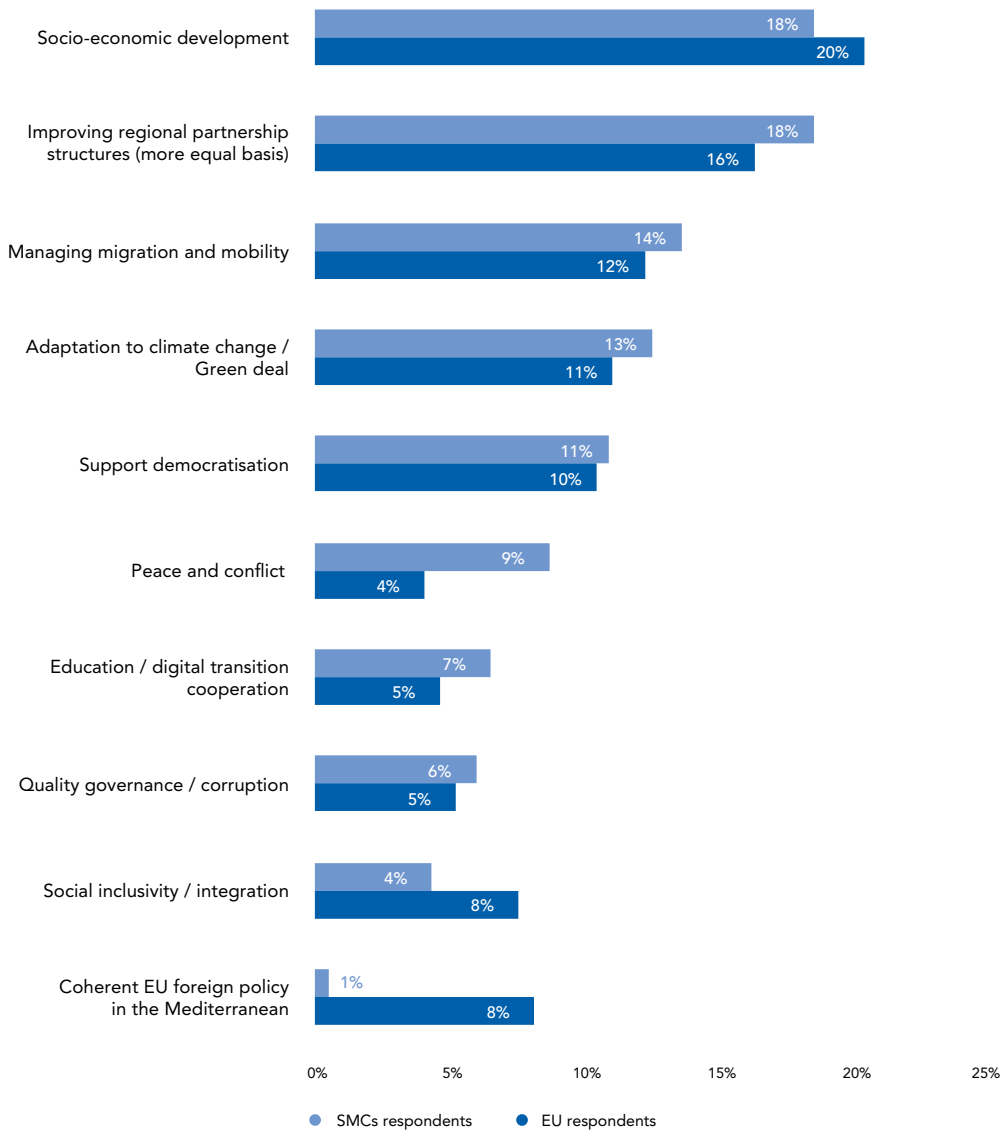
Arguments advanced in favour of a radical policy overhaul are invariably references to new geo-political realities, a definite split between the East and the South since the Russian aggression against Ukraine that would make a common ENP policy look out of phase, the need to give higher priority to the South, develop common ground and identify shared interest, including on conflict resolution and new challenges such as climate change adaptation and mitigation.

- **Soft security policies should be at the heart of the new approach:**

While crisis, conflict, and new geopolitical realities are seen as areas where the existing ENP has fallen particularly short of expectations, analysts participating in the survey in their vast majority (around 70%) and with little distinction between experts from the South or the North identify five pillars on which the hoped-for new partnership should be built: 1) socio-economic development (19.4%), 2) improving regional partnership structures (17.4%), 3) managing migration and mobility (12.9%), 4) adaptation to climate change (11.8%), and 5) support to democratisation (10.7%).

Interestingly, peace and stability with 6.5%, and governance and fight against corruption with 5.6% score rather low on the priority list. One may wonder if this is based on a low assessment of needs or if it rather expresses an expression of a lack of trust in the probability of serious improvements and the ability of even a re-vamped ENP to help in these fields. Whatever it may be, Southern observers expect more peace and conflict engagement from the policy than Northern (8.7% against 4.1%). Northern analysts, however, seem much more concerned with social inclusivity (7.6% to 4.3%) and furthering EU foreign policy coherence than their Southern colleagues (8.1% to 0.5%).

Graph 4: Q.2a What should be the new paradigm or the main focus of a revised or revamped ENP? (categories developed from open-ended answers)



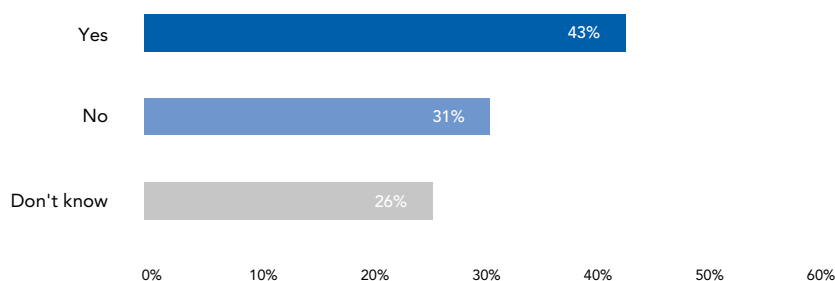
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- Establish a new policy framework for partnership with the South, while taking inspiration from elements in the European Union's Partnership with the East:

Respondents – strikingly in the EU even more than in the Southern Neighbourhood (51% vs. 47%) – are clearly in favour of splitting up the traditional ENP geography that unites the East and the South under one common umbrella (with 49% in favour of a split, 35% against and 16% undecided). They are pointing repeatedly to the growing differentiation between the two sub-regions and the game-changing nature of dynamics in the East, where the ENP approach is increasingly being overshadowed by a concrete EU accession perspective notably for Ukraine and Moldova, and in a more conditioned way for Georgia.

However, the proposed split is not radical: A relative majority of experts from the North and the South alike are of the view that a Southern Neighbourhood Policy should nevertheless take some inspiration from the Eastern Partnership: 43% in favour, with 31% against and 26% undecided. Votes in favour seem to be based on the view that in a variety of areas from economic and trade integration/DCFTAs to governance reform, mobility, and Erasmus scholarships the ENP has proven more effective in the East than in the South, not the least due to a – perceived – higher level of policy commitment by the European Union, and the will to establish a partnership between equals and to make available significantly more abundant resources.

Graph 5: Q.3a Do you think the Southern Neighbourhood Policy should get some inspiration from the Eastern Partnership?



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

In sum, experts both in the North and the South assess the European Neighbourhood Policy, as we know it, as little effective in the South over the past 20 years, since based on wrong assumptions and wrongly construed. They recommend replacing it with a new and specific EU policy approach to the South that should deal with socio-economic, climate, and democracy challenges, drawing strength from the EU's soft power competencies and its experience in the Eastern Neighbourhood but being distinct from it, and being based on true partnership, realistic assessments, and understanding of the complexities of the South, a considerably higher level of engagement and a commensurate allocation of political energy and financial resources.

How is this to be assessed?

The message included in the votes and comments of a considerably numerous and diverse community of specialist respondents from more than 20 countries – 445 persons – is downright unequivocal, as impressions converge in many regards even if written comments reveal a large diversity of perspectives often influenced by national points of view and mostly generalist positions. This is significant, as it can be assumed that the understanding of what the European Neighbourhood Policy *is* and *who its actors are* could vary quite a lot from one respondent to the other – e.g. whether the term ENP would be considered to refer only to the action of EU institutions in the neighbourhood region or also the one of EU member states, or if EU humanitarian engagement in Gaza and Syria or migration or trade policy initiatives in the Mediterranean form part of the ENP or are to be considered distinct EU policies that are only playing out in the same geographical area. Despite this, the level of convergence of views and recommendations of experts consulted is strikingly high.

However, it would not be obvious to construct a new policy approach that would promise higher effectiveness and more tangible results only based on these findings. Further thought must be given to several paradoxes and open questions that result from analysing the results of the survey, such as the following:

Which region and which form of regional partnership?

While recommending a new approach to the region, experts in their written comments make virtually no reference to a need for regional cooperation, or partnership, and to format where it best could take place. Neither the Union for the Mediterranean nor the Anna Lindh Foundation are mentioned, addressed, or assessed in any noteworthy way, nor at least criticised, recommended to be reformed or perhaps replaced by new successor bodies. Their action, mandates and potential do not seem to be considered overly relevant in the context of the survey. It should be asked: How could they be empowered to provide more stimulus and co-ownership to the partnership's regional dimension? Or do they need to be replaced?

Similarly, the geography of the desired new policy approach is not being defined in any sizeable detail. This element, however, would merit further reflection: If ge-

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opolitical realities in the Mediterranean have changed, as most of the respondents hold, should any new EU to the region approach not constitute a MENA partnership, including the Gulf countries and Iraq, rather than simply continuing with the present EU-Southern neighbourhood geography? Is the geography of the European Neighbourhood Policy still the appropriate one in order to ensure policy effectiveness and equal partnership?

How to better understand the South and construe a more credible partnership among equals?

Respondents do not reflect on the ongoing trend of fragmentation of country realities and interests in the South itself that makes it ever more complex to come up with a common policy framework for the region.

Experts – not only from the South – see the present ENP still as too euro-centric and imbalanced, and despite the 2015 reform, which endeavoured to phase out much of the previous pre-accession style methodology by introducing a more differentiating, pragmatic, and mutual interest/mutual accountability-based approach. However, experts provide only little insight into what it would take for the EU to better listen and understand the South and adapt the policy better to its needs. Which mechanisms and practices would it take to overcome this problem?

They also do not reflect on the ongoing trend of fragmentation of country realities and interests in the South itself that makes it ever more complex to come up with a common policy framework for the region, in whatever way it is geographically defined. Has this fragmentation reached a point where it makes only little sense to still assume that there is a joint “Southern Neighbourhood” rather than just a geography of individual countries with very distinct realities, interest and needs? In other words, what justifies a regional approach today, and if it is maintained, how to structure it and make it a basis for a credible partnership of equals?

In this context, it should also be further elucidated what Southern neighbour countries’ interest is in the ENP. If they confirm their interest, as they did in the 2015 ENP public consultation exercise, what would be their suggestions to make the partnership at the same time more functional, co-owned, and better balanced?

This is not only a question of balance and fair partnership. If, as many respondents noted, higher levels and a clearer focus on EU political and financial commitment would be required to make the policy more effective, the question has to be addressed what Southern partners themselves bring to the process to make it more attractive and relevant and therefore justify such higher level of EU engagement? Not a somewhat ailing process is what is needed but a partnership that is a conduit to solutions in the joint neighbourhood. In partnership, as in tango, it takes more than just one partner to make it happen...

Who should be the partners and how to take into account their interests?

Respondents generally refer to the “Southern Mediterranean” in a rather generic way. This leaves open the question to which extent the EU should focus its policy on intergovernmental cooperation – only or at least mainly – based on mutual interest and in a transactional way, and whether or how far the EU policy should also seek a dialogue and interaction with civil society and other non-state actors, as it was tried not only but in particular between 2011 and 2019. This question is of particular relevance if one considers the tremendous size and speed of change in societies in the region, not the least due to the demographic dynamics and the huge percentage of youth in Southern Mediterranean societies but also to the impact of modern media, communication technology and the emergence of Artificial Intelligence options. Both trends will not fail to leave their deep mark on governance systems and public opinion alike in the region. How must a partnership approach be construed that takes into account factors in the reality of societal change in the region?

Size and speed of change in societies in the region (demographic dynamics, impact of modern medias) is of key relevance when thinking about whether or how far the EU policy should also seek a dialogue and interaction with civil society and other non-state actors.

How can the new policy become relevant in a crisis- and conflict-stricken region?

The Mediterranean and Middle East region is, or many of its countries are, marred by crisis and conflict. Little speaks for the view that this could change any time soon, on the contrary. As was discussed above, however, respondents gave particularly low scores to the ENP on conflict resolution (85%). In the EU itself the debate on how to make Europe more resilient against crisis, how to boost European armament and defence, and ultimately whether to set up a European army or build a stronger European security identity is in full swing. The majority of participants in the survey still recommend soft security and human development topics as the priorities of a new policy approach for the region. While they may have a point, the question must be discussed if a revamped ENP for the South, or any other form of new policy partnership, could really be imagined without a much stronger crisis management competence that would possibly even include credible hard security elements.

Coming up with credible solutions in this regard is all but simple but it can be assumed that the war between Israel and the Hamas following the 7 October 2023 attack against Israel will further accentuate the question.

The critical assessment of the ENP should be heard as a call for a new and more effective partnership that must be comprehensive, inclusive and differentiated, and as much as possible in every partner’s interest.

The European Neighbourhood Policy in the South needs new momentum, effectiveness, and better balance. May ENP effectiveness presently fall short of expectations, dropping it altogether in favour of pragmatic bilateralism is not an option to be recommended. There is hardly any credible alternative to some form of a specific Euro-Mediterranean or Euro-MENA Partnership. You cannot ignore geography, neither is it wise to ignore history. A short-term, day-to-day transactional policy approach may produce partial successes, but it will fail to build solid partnerships, address long-term structural problems, and enable partners in the South and the North of our common Mediterranean Sea to exploit politically, economically, and socially the potential of their common neighbourhood. Mere transactionalism can, in the long run, not replace partnership.

Therefore, the critical assessment of the European Neighbourhood Policy in the South expressed by the 445 respondents from inside and outside the Mediterranean region must not be understood as a justification for giving up the policy. It should be heard as a call for a new and more effective partnership that must be comprehensive, inclusive and differentiated, and as much as possible in every partner's interest. What at first sight looks like a squaring of the circle, can perhaps nevertheless succeed if it is approached with honesty, dialogue, the will for understanding, and a sense of commitment.

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Assessing the European Neighbourhood Policy's future

Maria Giulia Amadio Viceré
Assistant Professor at LUISS University

In 2004, the European Neighbourhood Policy (ENP) became the policy framework setting the scene for EU interactions with its neighbours. The launch of this policy framework occurred in a context of relative stability and peace in Europe's neighbourhood, at a time when the EU was redrawing its borders through the 2004 big bang enlargement. Nonetheless, the ENP was doomed to face a range of conflicts, crises and even wars. No other policy framework in the EU encountered so many challenges across time and spread across various policy sectors. Twenty years on, the EuroMeSCo Survey reveals a widespread disillusionment regarding the effectiveness of the ENP impact on the areas of priority for EU interactions with the Southern Neighbourhood. A disillusionment that is coupled with the perceived need to change the current ENP, either through another revision of it or through its complete renovation as a policy framework. How did we get here? And what could we do to relaunch the ENP?

The launch of the ENP occurred in a context of relative stability and peace in Europe's neighbourhood, at a time when the EU was redrawing its borders through the 2004 big bang enlargement.

Ineffective Impact

The results of the EuroMeSCo Survey indicate that the ENP impact has been extremely limited across a range of relevant policy areas for EU interactions with the Southern Neighbourhood. The survey respondents perceive such impact to be largely ineffective concerning conflict resolution in the Southern Mediterranean region, democracy and respect for human rights in the Southern Mediterranean countries, and mobility and mutual understanding between people. While the ENP's impact appears to be slightly more effective on the socio-economic development in Southern Mediterranean countries, trade integration seems to have benefitted the most from the ENP. If one considers that these policy areas largely correspond to the main objectives of the EU and the ENP stated in the EU treaties, these negative responses signal a relevant failure of the EU in dealing with its neighbours, at least in terms of public perception. Indeed, the ENP does not seem to have been able to support the EU's ambitions to "establish an area of prosperity and good neighbourliness, founded on the values of the Union and characterised by close and peaceful relations based on cooperation" (TEU, Art. 8). At the same time, it does not seem to have

The ENP does not seem to have been able to support the EU ambitions. At the same time, it does not seem to have provided the EU with the necessary apparatus for promoting its values and interest.

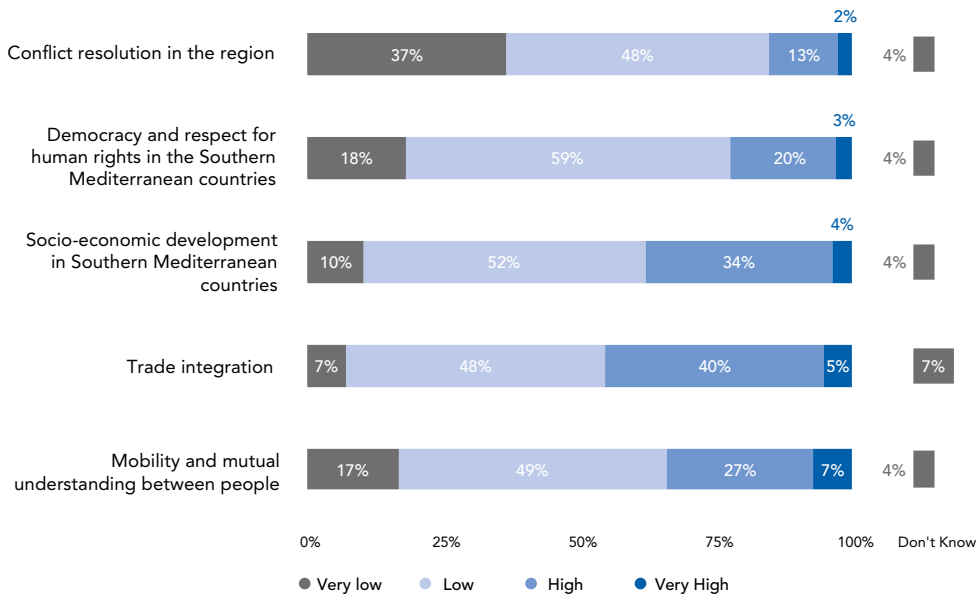
provided the EU with the necessary apparatus for promoting its values and interest, as per TEU, Art. 3.5.

At first sight, these results do not come as a surprise. While multiple crises occurring in the Southern Neighbourhood have marred these policy areas over the past years, the EU has been often unable to provide effective responses to them. Nonetheless, a closer look at the variation in percentages across policy sectors reveals an interesting pattern: the respondents' perception of the ENP's effectiveness on a given policy area seems to be positively correlated with the European integration of that policy area. In essence, the more a policy area features the involvement of EU institutions in member states' related policies, the more respondents have perceived the ENP to have had an effective impact on that policy area.

Significantly, EU activities rooted in the common foreign and security policy area, which functions according to an intergovernmental logic and does not envisage a discretionary role for EU institutions, scored the lowest percentages. Indeed, a vast majority of respondents considered the effectiveness of the ENP's implications on democracy and the respect for human rights, as well as on conflict resolution to have been between low and very low (77% and 85%, respectively). EU activities rooted in highly integrated policy areas, conversely, scored the highest percentages. In particular, the policy area with the highest percentage of positive responses is trade, with 45% of respondents believing that the effectiveness of the ENP's impact has been between high and very high. Socio-economic development is the policy area with the second-highest percentage of positive responses (38%). The ENP's impact on mobility and mutual understanding between people, which is largely rooted in EU migration policy, is considered slightly less effective (34%). It is true that the difference between this area and the area of socio-economic development is not very significant. It is relevant to note, however, that EU migration policy presents more intergovernmental features than EU development policy. Interestingly, this interpretation is in line with the most recent studies on the European integration of member states' foreign policies within the context of the European Neighbourhood Policy, as well as with studies on EU activities in global governance (Amadio Viceré & Hofmann, 2023; Amadio Viceré & Venneri, 2023). At the same time, these results resonate with pundits and scholars calling for a restructuring of the EU institutional construction. Especially, with those calling for a restructuring geared towards a deeper and thorough integration of member states policies across sectors (Fabbrini et al., 2023; Lehne, 2022).

When assessing ENP effectiveness, EU activities rooted in the common foreign and security policy area, scored the lowest percentages, while EU activities rooted in highly integrated policy areas scored the highest percentages.

Graph 1: Q.1 The European Neighbourhood Policy (ENP) was designed 20 years ago. It became the structuring framework of Euro-Mediterranean relations. Since then, to what extent do you consider that it has effectively impacted the following areas?



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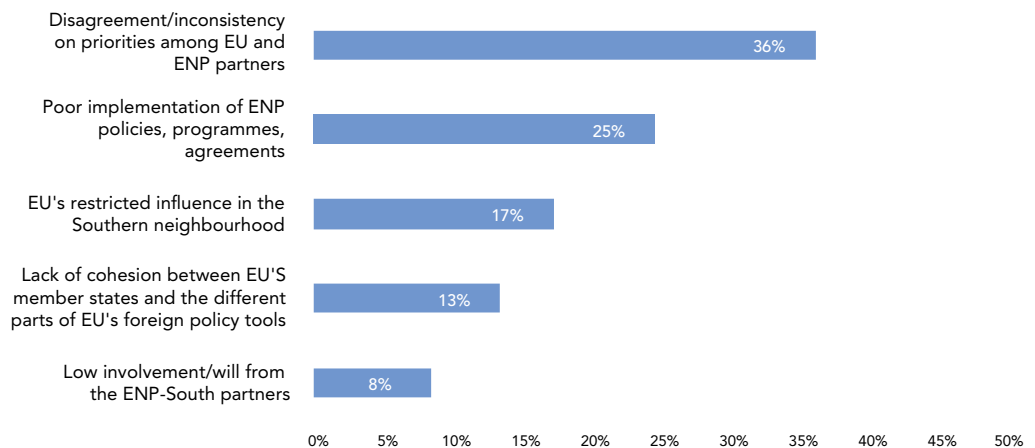
Still, integration dynamics – or the lack thereof – may not be sufficient to explain the ENP's limited impact on these policy areas. In fact, the EuroMeSCo Survey indicates that respondents consider disagreement and inconsistencies on priorities among EU and ENP partners as the main cause of the ENP's limited impact (see graph 2). True, the ENP has been scarred by such criticism ever since its first launch. Yet its persistence calls for the need of a conscious reflection process on the EU side. A reflection process that, according to some, should start from a decentering of EU foreign policy through a post-colonial understanding of its practices (Fisher-Onar & Nicolaïdis, 2013) and a greater effort towards the inclusion of the ethical and practical requests of EU partners (Wolff et al., 2022). Indeed, rather than being considered an ethical, normative power, the EU has been increasingly accused of organised hypocrisy in its approach to the Southern Neighbourhood over the past years (Cusumano, 2019; Longo, Panebianco, & Cannata, 2023).

Another cause of the ENP's limited impact, identified as particularly relevant by the survey's respondents, is the poor implementation of its policies, programs and agreements. This result may derive from external institutional dynamics. Some have argued in this regard, that an EU limited influence may be ascribed to the ENP reproduction of hierarchies between EU member states and ENP partners. Insofar as

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the ENP will remain a tool for political and economic integration, they claim, the EU will be largely unable to achieve democratic & economic reforms in its neighboring countries (Aarstad & Bremberg, 2017; Amadio Viceré & Fabbrini, 2017). Nonetheless, institutional dynamics internal to the EU may have hindered EU coherence and capability as well. The institutional architecture structuring the functioning of the ENP has been affected by rivalries among EU institutions, especially the European Commission and the European External Action Service. Additionally, the proliferation of EU institutional actors has often determined a dispersion of control, and hence limited the effectiveness of the ENP.

Graph 2: Q.1b In general terms or in relation to the specific areas mentioned above, why do you think the impact has been limited? (categories developed from open-ended answers)



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The ENP has generally relied mostly on regulatory political and economic instruments rather than on security related tools.

The survey respondents also ascribed the limited ENP's effectiveness to EU's restricted influence in the Southern Neighbourhood. While the Southern Mediterranean region has been at the center of the EU pursuit of its strategic autonomy, the 2021 New Agenda for the Mediterranean reiterated the region's strategic relevance for the EU (European Commission, 2019, 2021). Certainly, despite increasing competition from China, the United Arab Emirates and the United States, the EU is still the most influent trade partner of Southern Mediterranean countries (Amadio Viceré & Venneri, 2023). Yet, as the EU's absence from negotiations between Israel and Hamas over the past months shows, its influence is considerably limited in the region's security.

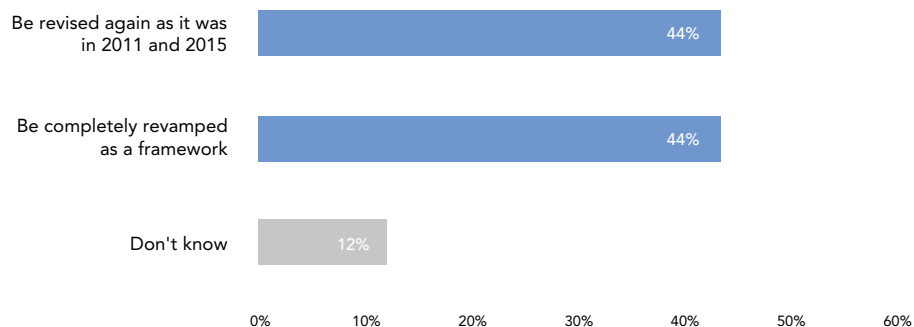
This pattern does not come as a surprise either. Indeed, the ENP has generally relied mostly on regulatory political and economic instruments rather than on security-

related tools. The overall lack of cohesion between EU member states and the different parts of the EU foreign policy tool is also identified as a cause behind the ENP limited impact. As discussed above, in fact, the preeminence of EU member states in certain policy sectors, coupled with the contested nature of EU geographical, political, and economic boundaries, has often led to decisions and policies reflecting the lowest common denominator consensus among member states (Hoffmann & Niemann, 2018). Lastly, only a limited number of respondents identified the low involvement/will on the side of the ENP-South partners as a cause behind the ENP's ineffectiveness. Such a result indicates that, despite the criticisms it faces, the EU is still perceived as a welcome partner by Southern Neighbourhood countries.

Need for a Change

Is the ENP in need of a change? The EuroMeSCo Survey shows that there is widespread agreement about the need to change the ENP. While 44% of the respondents believe that the framework regulating EU interactions with its neighbors should be revised again as it was in 2011 and 2015, another 44% believes that it should be completely revamped as a framework.

Graph 3: Q.2 Since its inception in 2004, the ENP has been reviewed several times. The 2011, 2015 reviews, 2021 New Agenda for the Mediterranean. The ENP should:



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

In principle, revising the current ENP could be a first step towards tempering its limited impact on the effectiveness of EU engagement with the Southern Neighbourhood. Nevertheless, a simple revision is unlikely to be groundbreaking. Since its inception, the ENP underwent two major revisions, in 2011 and in 2015. Rather than addressing EU structural shortcomings, however, these revisions embodied EU rhetorical impulses and pragmatic – at times cynical – setbacks. The 2011 review was a response to events in the Arab world and was mainly geared towards sup-

Rather than addressing EU structural shortcomings, 2011 and 2015 ENP revisions, embodied EU rhetorical impulses and pragmatic setbacks.

porting democratisation processes to change the EU pace after decades of implicit acquiescence to authoritarian regimes in the Southern Neighbourhood. With the 2015 review, against the backdrop of conflicts in the region and the “refugee crisis”, stabilisation once again became the main paradigm of the ENP. A securitising trend like this still taints EU’s approach to the region. The recent EU migration policy in Tunisia is an important example. While the EU de facto externalised the management of migration to Tunisia, its strategy failed from the very beginning with only minor decreases of migrants’ arrivals in Europe. Even worse, as the EU did not introduce meaningful accountability mechanisms for migration management by Tunisia, it led to widespread human rights’ violations (International Refugees, 2024).

More recently, as the Covid-19 was still raging, the 2021 New Agenda for the Mediterranean, proposed in the framework of the ENP, sought to relaunch and strengthen the strategic partnership between the EU and its Southern Neighbourhood partners.

An Economic and Investment Plan for the Southern Neighbours attached to the Agenda was to sustain the region’s long-term socio-economic recovery (European Commission, 2021). This notwithstanding, the Southern neighbourhood continued to face structural obstacles towards inclusive growth and competitive markets, which significantly impeded the region’s recovery from the pandemic-induced economic crisis, (OECD, 2021). Attributing these countries’ structural problems to the EU would not do justice to its engagement with the Southern Mediterranean region. Yet while capable of harmonising rules and boosting trade flows, the ENP’s overall reliance on the political use of economic interdependence has proven insufficient to address state fragility, poor governance structure, and the spread of corruption in the countries’ security sector (Amadio Viceré & Bonomi, 2021).

Conversely, revamping the ENP completely as a policy framework would address its shortcomings more effectively. A first step in this direction, as indicated by many of the survey respondents, could be employing a more geographically tailored approach to the Southern neighbourhood. The 2022 outbreak of the Russian war in Ukraine has provided the opportunity to do so. The war triggered a systemic change in the ENP by setting the basis for the accession of three ENP-East countries into the EU, namely Ukraine, Moldova, and Georgia. Albeit the ENP will still cover part of the Caucasus, such a change reflects a pattern that was already present in the past. Eastern European countries had been willing to access the EU ever since the demise of the Soviet Union. While their participation in the ENP was often perceived as an intermediate step towards becoming EU members, with the aspiration of escaping Russia’s imperialism, these countries have been generally keener than ENP-South countries to adapt to EU requests. Southern Neighbourhood countries, on the contrary, have often perceived the EU as a continuation of European countries’ colonial aspirations. This considered, the EU’s renewed approach should also be more compartmentalised, to consider specific countries’ aspirations and needs while striking a balance between them and EU priorities in the region.

As a second step, the EU should go beyond the mere use of economic interdependence to achieve its political results. On the one hand, it should devise a strategy focused on its neighbours’ economic growth and make investments in its social and

The EU renewed approach should be more compartmentalised. Consider specific countries’ aspirations and needs while striking a balance between them and EU priorities in the region.

human resources to foster these countries' societal resilience. Consistently engaging Southern Mediterranean countries in EU climate strategy, for instance, could catalyse structural changes in the region while fostering inclusive economic growth and good governance (Tocci et al., 2023). On the other hand, it should monitor more consistently these countries' use of its support, including when they manage migratory flows on its behalf. Finally, the EU should embed more consistently its common foreign and security policy tools into a revamped framework. As the US 2024 elections are looming over the US engagement in the Southern Mediterranean and the duration of the Israeli-Hamas war remains uncertain, this will be a crucial challenge for the EU. True, given the intergovernmental functioning of such tools and member states' divisions on security-related issues, achieving such a consistency may be very hard. Yet, as the EU response to the Russian invasion of Ukraine through the Instrument for Peace and Facility taught us, EU institutions could devise arrangements that may bridge the gap between EU security aspirations and its capabilities without excessively hindering member states' willingness to keep a tight control over EU foreign policy processes.

The EU should embed more consistently its common foreign and security policy tools into a revamped framework. As the US 2024 elections are looming over the US engagement in the Southern Mediterranean and the duration of the Israeli-Hamas war remains uncertain, this will be a crucial challenge for the EU.

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Differentiation, incentive-based approach and joint ownership – Two decades of ENP's expectations – Real-politique gap

Dr. Maya Sion Tzidkiyahu

Director of Israel – Europe Relations Program, Mitvim Institute.

Lecturer at the European Forum, the Hebrew University of Jerusalem.

Three decades have passed since Christopher Hill wrote about the gap between expectations and capabilities that the European Union's (EU) Common Foreign and Security Policy (CFSP) created since its inception (Hill, 1993). The start of ENP caused similar gaps. The President of the European Commission, Romano Prodi's 2003 promise to ENP countries of "everything but institutions" created unrealistic expectations to the extent it was described as "the original sin" (Blockmans, 2017). As promise and deed were apart, the ENP gap was titled as that between conception and performance (Koenig, 2016). EuroMeSCo's Euromed Survey shows this gap still very much exists. However, it also shows that the principles on which ENP was based are held worthy on both sides of the Mediterranean.

On the eve of a new European Commission, set to enter by the end of the year, yet another review of ENP awaits. Expectations regarding the South are not high while challenges are. The EU is known for its cumbersome and usually slow pace of change, which is especially felt in intergovernmental consensus-based CFSP. As a club of 27 member states with diverging views and interests, the EU usually fails to do a re-start: to erase an unsuccessful policy and start over a new page. When it announces a reform, it ends up with a quilt of many old and some new principles and tools (Cardwell, 2012).

Yet what is most needed in ENP is less a reform of principles and more their realization. To narrow the conception – performance gap the emphasis needs to be on the output legitimacy, meaning the performance side, though ENP can also benefit from increasing input legitimacy by not only conducting more roundtables with Southern Mediterranean countries (SMCs) policy-makers, experts, and civil society

Survey results shows that the gap between conception and performance still very much exists. However, it also shows that the principles on which ENP was based are held worthy on both sides of the Mediterranean.

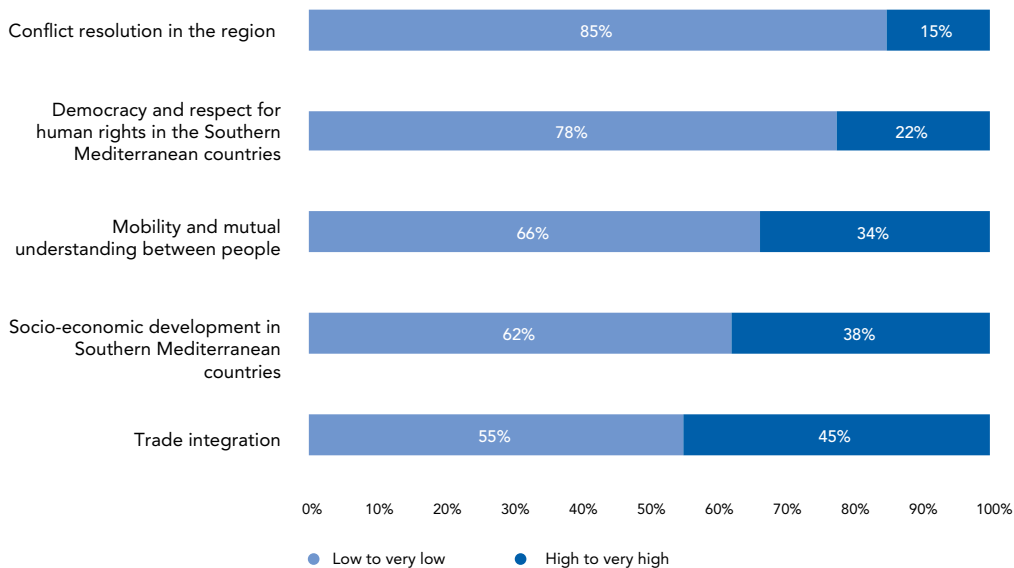
When examined in retrospect, after two decades, one can observe some progress in implementing a few of the principles it was founded upon, such as differentiation which was given new tools.

organisations (CSOs) but also by letting them comment on the initial drafts of the revised ENP.

ENP was criticised as institutionally weak, lacking meaningful funding, and too soft to coerce political change (Blockmans, 2017). It has been lacking the EU's political willingness to act upon its conditionality mechanism according to its core values (Kostanyan, 2017). Yet, when examined in retrospect, after two decades, one can observe some progress in implementing a few of the principles it was founded upon, such as differentiation which was given new tools (see below). And so, ENP should turn to be less of a one-size "cookie cutter", as one survey respondent described it. On joint ownership, some progress was made, but criticism is still very high. One respondent called it a "smoke screen" to impose EU priorities. What is most lacking is the political will to apply conditionality according to the incentive-based approach, which is still a far cry from the EU's declaratory statements.

Those are not the only values the EU is insufficiently promoting. Conflict resolution, democracy and respect for human rights, mobility/ migration, and socio-economic development are all challenging areas the ENP is supposed to tackle. These challenges are especially high regarding the Southern neighbourhood (EIU Democracy Index, 2024; UN 2023). This is recognised by the respondents to Euromed Survey, who most found the EU's effective impact on these four areas to be either 'low' or 'very low': 85% regarding conflict resolution, 78% regarding democracy and respect for human rights, 66% on mobility/ migration and 62% on socio-economic development (Q.1). The low-performance rates are considerable. Two decades after the initiation of the ENP, these are grim results.

Graph 1: Q.1 The European Neighbourhood Policy (ENP) was designed 20 years ago. It became the structuring framework of Euro-Mediterranean relations. Since then, to what extent do you consider that it has effectively impacted the following areas?



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

The principles of differentiation, defined as the ability to have a tailor-made framework of cooperation between the SMCs and the EU was a novelty of the ENP. It stood in contrast to the Barcelona Process, which tended to progress at the pace of the Southern low, sometimes lowest, denominator (Pace, 2004), and therefore had no reference to an individual incentive-based approach (“more for more”). Joint ownership was introduced by the European Commission to the ENP to enable “the EU and third countries to define cooperation objectives through mutual consent and ‘give added weight to the agreed priorities for action’” (Zardo, 2022).

Following three ENP re-evaluations and reforms (in 2011, 2015, 2021) these three principles demonstrate the gap between the high expectations and quite a disappointing reality. 49% of all respondents do not think the EU applied the principle of differentiation effectively. Only 25% think it did (Q.4a). 56% do not think the application of the incentive-based approach led to more political and economic reforms in the SMCs. Only 27% think it did (Q.5a). 64% do not think SMCs feel they co-own ENP, while a mere 15% think they do. Yet in some SMCs percentages are a bit higher on joint ownership. In Egypt a third of the respondents do think co-ownership was employed, among the Palestinians surveyed 37% think so, and in Jordan, this percentage rises to 40%. The question begs – was it something the EU did better, and if so, can it be replicated in the Maghreb, or were the Mashreq expectations more

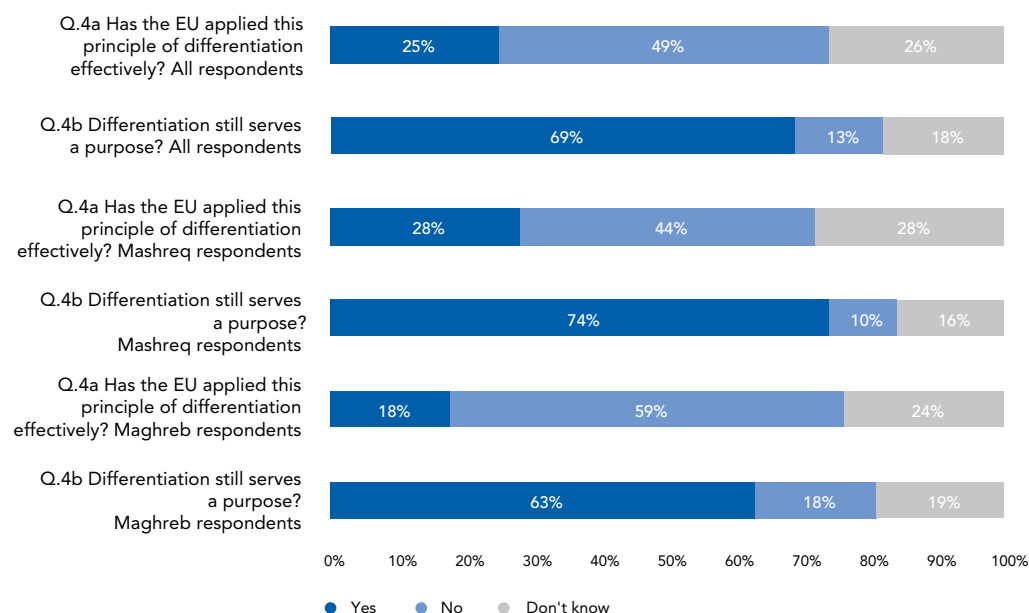
Following three ENP re-evaluations and reforms (in 2011, 2015, 2021) the three principles (differentiation, more for more, joint ownership) demonstrate the gap between the high expectations and quite a disappointing reality.

Survey results show however, wide agreement these principles are relevant and should be kept and implemented.

modest to begin with? The EU should learn from them what it did that increased their sense of joint ownership and examine if it would work with other SMCs too.

There is, however, wide agreement these principles are relevant and should be kept and implemented. While only 25% of the respondents think the EU applied differentiation effectively (Q.4a) 69% think differentiation still serves its purpose and wish the EU offer SMCs tailor-made partnership (Q.4b). In retrospect of two decades, one can see more differentiation, especially in the move from the first round of the general all-encompassing 'Action Plans' (AP), to the second more advanced round of APs, and when APs were replaced with short-list individual 'Partnership Priorities' in 2015 and the EU added different kinds of tailor-made partnership agreements, e.g., on mobility and migration (Andrade, 2020), on climate change, energy and green transformation, or strategic/ privileged partnership. Again, overall, the answers of the Mashreq countries are slightly more positive than the Maghreb: 28% versus 18% respectively. However, there are mixed results inside these groups: 35% of the respondents in Egypt found differentiation was applied effectively, 33% in Lebanon, 31% in Israel, yet only 10% in Jordan. 29% in Morocco, compared to only 10% in Tunisia. This does not correlate to the different tools the EU used with each SMC.

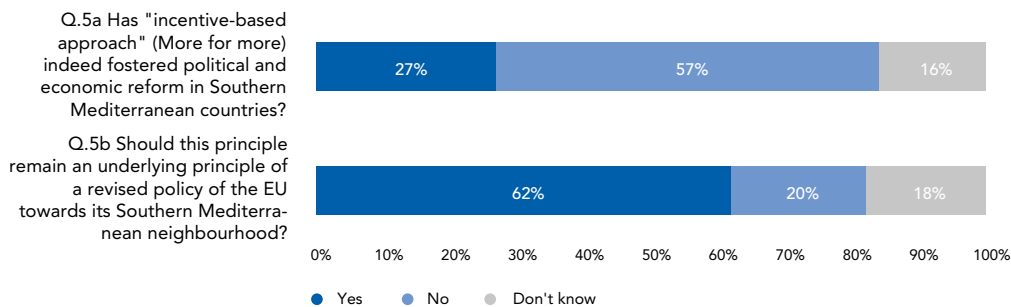
Graph 2: Q.4 One of the most distinctive principles of the ENP is differentiation, under which the EU recognizes the different aspirations of partner countries in their relations with the EU and offers them tailor made partnerships accordingly.



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

The same twist can be seen regarding the “incentive-based approach”, introduced to ENP in 2011: 57% think it did not foster political or economic reform in the SMCs (only 27% think it did, Q.5a), yet 62% think it should remain an underlying principle of a revised ENP (Q.5b). Whether it reflects the path-dependency of EU and SMCs participants or principled views, it is for the next European Commission to strive to advance its achievement.

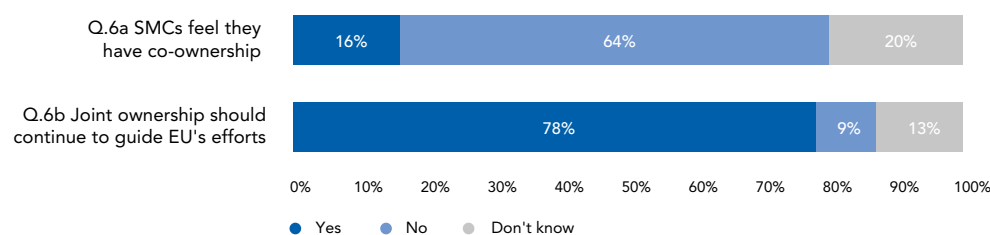
Graph 3: Q.5 Since the inception of the ENP, the EU has strived to make some modalities of its financial assistance conditional, with the objective to provide “an additional incentive to pursue political and economic reform”.



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

On joint ownership, the gap is even wider: 64% of the respondents do not think SMCs feel co-ownership over ENP (Q.6a). Yet 78% of the survey respondents think the principle of joint ownership should continue to guide the EU’s efforts in redefining its approach to SMCs (Q.6b). Input legitimacy has been enhanced in the last few years by consultations and roundtables with SMCs. These efforts begin to be reflected in the answers given by CSOs, which are the highest, but still very poor (23%). Experts’ answers reflected the lowest level of input legitimacy (10%).

Graph 4: Q.6 Since the inception of the ENP, the EU regularly reiterated that it “does not seek to impose priorities” on its partners, and the principle of joint ownership has featured indeed consistently in EU strategic documents related to the ENP. Q.6a Do you think EU Southern Mediterranean countries feel they co-own the ENP? Q.6b Do you think the principle of joint ownership should continue guiding the EU’s efforts in redefining its approach vis a vis its Southern Mediterranean neighbours?



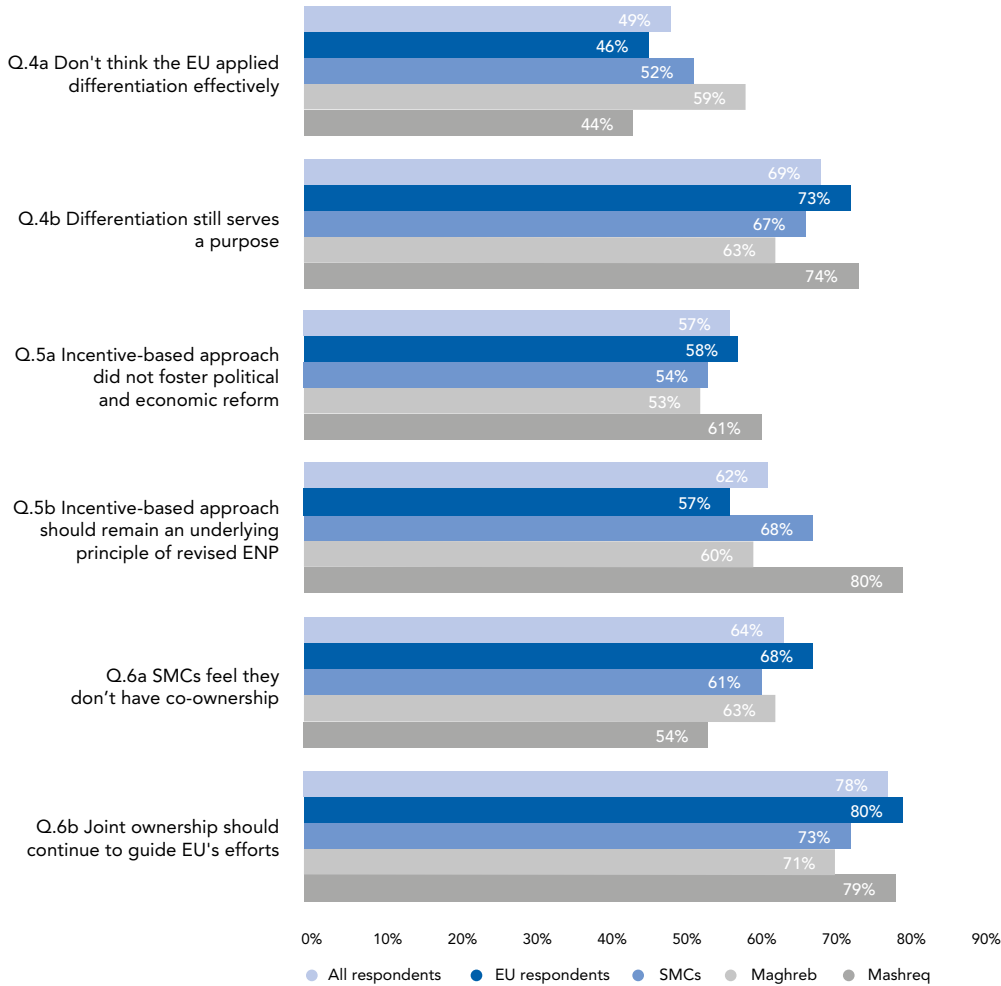
Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

ENP principles themselves still enjoy strong support on both sides of the Mediterranean. The challenge, therefore, is for both sides to improve its implementation and work on ENP deliverables according to them, not to replace them.

The gap between expectations and performance (real or perceived) is sobering. Disappointment comes both from the respondents in the SMCs and the EU. Yet, as mentioned, the principles themselves still enjoy strong support on both sides of the Mediterranean. The challenge, therefore, is for both sides to improve the implementation of these principles and work on ENP deliverables according to them, not to replace them.

Along the quite similar negative evaluation results are coming both from the EU and SMCs, there are some differences between the two sides of the Mediterranean. EU respondents wish to preserve the principles of differentiation and joint ownership slightly more than their SMCs counterparts: 73% in the EU and 67% in SMCs regarding differentiation (Q.4b), and 80% by EU respondents in comparison to 73% by SMCs regarding joint ownership (Q.6b). On the inclusive-based approach 68% of the SMC wish to preserve it, in comparison to only 57% of the EU (Q.5b). Oddly, it seems the respondents in SMCs (policy-makers, experts, and civil society organisations) believe a bit more in the effectiveness of the EU’s conditionality – if implemented properly – than the ones in the EU. This is quite unexpected, taking into consideration the criticism prevalent in these countries over the EU as post-colonialist. Among SMCs, on all three principles, the Mashreq countries wanted these principles to be applied more than the Maghreb. Further research is needed to explain this slight but consistent difference (see graph 5 below).

Graph 5: Reviewing some of the constitutive principles of the ENP.



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

Triangular or quadruple groupings on an ad-hoc basis is also a way to create more dynamism when implementing differentiation and joint ownership, as well as to advance cross-border cooperation across the Mediterranean.

Both wars (Russia against Ukraine and in Gaza between Israel and Hamas) have far-reaching regional implications and internal domestic ones. More emphasis on conflict resolution is needed.

Today the ENP does no longer reflect the original rationale. Perhaps a return to solely focus on the Southern neighbourhood is needed.

As differentiation and especially joint ownership are elusive, it would be beneficial if an independent research institute would develop an index to measure such principles based on joint and separate declarations, conduct of political dialogue, negotiations, content of agreements, partnerships and other forms of cooperation and their realisation on the ground, using this survey, interviews and focus groups methodology. Another form of measurement could be how far is an SMC from reaching the ENP goals (like OCED measurement regarding SDGs).

Mini-lateralism (Kibrik, 2024) is another way forward. Forming triangular or quadruple groupings on an ad-hoc basis is also a way to create more dynamism when implementing differentiation and joint ownership, as well as to advance cross-border cooperation across the Mediterranean. The EU-Morocco-Israel cooperation is an example, though it needs further development. Perhaps through an emphasis on cross-border cooperation, ENP can create more value both to the EU and among SMCs.

As mentioned, another round of ENP re-evaluation is expected upon the entry of a new European Commission in 2024. It comes at a time when the old “ring of friends”, declared in the 2003 European Security Strategy, which turned in its 2016 European Global Strategy into a “ring of fire”, has turned into a real security danger to the EU since 2022 due to the war of Russia against Ukraine. The neighbourhood security was further destabilised in 2023 by the Gaza war between Israel and Hamas. Both wars have far-reaching regional implications and internal domestic ones. More emphasis on conflict resolution is needed.

Russia’s attack on Ukraine was also done from the territory of Belarus, an ENP country. This war caused the Eastern Partnership to split up the countries upon which the EU suspends relations and inflicts sanctions, as with Belarus, and to countries that became either fast-track EU accession countries, as Ukraine and Moldova, to Georgia to which the EU granted candidate country status. The ENP, which in 2002 was set as an alternative to EU membership, as a policy tool to foster good neighbourly relations with the new neighbours to the east following the 2004-07 enlargement, has split in 2022 to EU candidates, which are future club partners (much more than friends), and foe & sanctioned. It no longer reflects the original rationale. Perhaps a return to solely focus on the Southern neighbourhood is needed.

To conclude, despite the considerable progress CFSP has made, Hill expectation – capabilities gap and Koenig ENP conception – performance gap arguments still hold, and perhaps even more so, as the foreign and security challenges of the 2020s are far greater than those of the 1990s. The principles on which ENP was based: differentiation, incentive-based approach, and joint ownership receive very low markings both in the EU and SMCs, but they are also held worthy on both sides of the Mediterranean. What is most needed in ENP is less a reform of principles and more their realisation. To narrow the conception–performance gap, the emphasis needs to be especially on the output legitimacy (the performance side), but it would be useful and reinforcing to also increase input legitimacy. It is for both sides to improve the implementation of these principles and work on ENP deliverables according to them, not to replace them. Both the EU and SMCs should work jointly to narrow the gap between expectations and conceived realisation and realize more the promise of ENP differentiation and joint ownership and work on ENP deliverables.

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New dynamics to the Euro-Mediterranean relations? Settling an “unnecessary confusion” between the Union for the Mediterranean (UfM) and the European Neighbourhood Policy (ENP)

Erzsébet N. Rózsa

Professor and Academic Advisor, Institute of World Economics, IWE, Hungary.

Ever since the idea of the “interrelation between ... security in Europe and security in the Mediterranean area” (Helsinki Final Act, 1975, pp. 36-37) and the necessity to cooperate between the two emerged, the understanding that “strengthening of security and the intensification of co-operation in Europe would stimulate positive processes in the Mediterranean region” (Helsinki Final Act, 1975, pp. 36-37) became the basis of the further development of the Euro-Mediterranean space on the one hand, and the idea that the projection of European values could add to this mutual security, on the other.

Almost fifty years later and following three efforts to institutionalise the relationship through the (Euro-Mediterranean Partnership – 1995, European Neighbourhood Policy – 2004 and Union for the Mediterranean – 2008) the rationale – security and cooperation – has gained increasing support yet, there have been questions around the methods of implementing these.

In the Euro-Mediterranean space, the rationale – security and cooperation – developed in the last decades, has become increasingly supported, yet, the modalities have come to raise questions regarding the implementation.

The present paper aims to review to identify the main issues regarding the ENP and the UfM based on the results of the survey conducted by the European Institute of the Mediterranean in 2023 on “The future of the European Neighbourhood Policy”, which aimed to collect perceptions and draw conclusions regarding the achievements (or failures) of the Euro-Med frameworks. Q.7 sought opinions and experience with regards to ‘structure’ related issues in the frameworks, especially the ENP and the UfM.

Different eras, different priorities

The relationship between the EU and the countries in its Southern neighbourhood has been reflected in three different institutionalised partnerships, each reflecting a different era and a different phase of European interests and understanding relations.

The relationship between the European Union and the countries in its Southern neighbourhood has been reflected in three different institutionalised partnerships, each representing a different era and a different phase of European interests and understanding relations. The Euro-Mediterranean Partnership, based on the Cold War model of the Helsinki Process, led to the OSCE and organised the different aspects into three baskets (political-security / economic-financial / social-cultural), its comprehensive approach was at the forefront. From the EMP to the ENP, Europe was not just establishing the European Union, but also went on extending it. Thus, the principles of the organisation and extension were in focus. While the European Neighbourhood Policy was still formally arranged according to the three baskets (as the bilateral agreements show), its priorities – following the regime changes in Central Europe and the newly independent states accessing the European Union – were the “shared values, the promotion of democracy, rule of law, respect for human rights and social cohesion” (European Neighbourhood Policy, 2004). But while the Euro-Med Partnership’s ‘target’ partners were the countries on the Southern/Eastern shores of the Mediterranean, the European Neighbourhood Policy wanted to attract into partnership a much wider set of countries, that are historically, socially and culturally largely different. The Union for the Mediterranean finally came to complement the EMP with a mutually beneficial fourth pillar, where the six main projects strengthened the regional approach.

Structure - the regional dimension

Framing the Euro-Mediterranean as one region was a rational choice, partly based on the consequences of historical contacts, yet, ever since the delineation, it put forward challenges: namely, the region as such was too big, smaller sub-regions having different characteristics and interests, or countries geographically located far away from the shores of the Mediterranean had not been directly impacted, etc. Yet, with the European integration process going forward, by the tenth anniversary of the EMP, the concept of the Euro-Mediterranean region became accepted and implemented.

While in the North, the development of the European Union as a unified actor made the implementation of the concept of the Euro-Med region relatively easy, in the South, the regional dimension and the ‘South-to-South’ relations had to be supported and promoted (as foreseen in the EMP documents). While there have been some

sub-regional cooperation frameworks in the South, most notably the Arab Maghreb Union, it is the projects proposed in the fourth pillar of the UfM that seem to improve such relations (e. g. the trans-Maghreb highway, etc.). The same idea seems to recur in the “cooperative regional orders” of the Global Strategy. (Global Strategy, 2016, p. 10, 32)

Yet, the Southern/Eastern shore countries have no ‘regional’ perception of themselves, despite the cultural-historical-emotional bonds among the Arab states, from which definition Israel and Turkey are excluded, and which is intricately broken down into different, even shifting pieces along political, security and economic fault lines.

Consequently, although it may seem like it, this Euro-Med relationship is not between two regions, but it is within one greater region (the Euro-Med), where the EU is one big entity and the rest are there ‘individually’. (Although there are institutionalised dialogues between the EU and the African Union, or the EU and the Arab Maghreb Union, these are much less developed in substance.)

A further remark on regionalism reveals that, despite the efforts to adjust to the realities¹ the European Union’s regional approach, this has no (or very limited) consideration of changing regionalities, i.e. that regions that had been defined for decades may break down and/or new regions may emerge based on local developments. The fact that the Maghreb (an integral part of the Mediterranean region) is increasingly turning attention away from the Mediterranean towards the Sahel due to security concerns (state failures, migration, terrorism, etc.), (N. Rózsa & Marsai, 2022) or that the Levant has started to develop increasingly stronger relations with the Persian Gulf (before the current war in Gaza) seems to support this observation. While the Red Sea in itself is not directly on the Mediterranean, via the Suez Canal it is connected, thus the evolving crisis there may also prove the above remark on the importance of the flexibility of regional delineations. Although there have also been new regional strategies issued by the European Union, such as the EU’s Sahel Strategy, and the institutionalised ‘EU-to-a-region dialogues’, in which two that belong to the Euro-Med space (EU-AU, EU-AMU) are also included, it seems that the EU still relies on the so-far accustomed regional terminology – making the issue even more complicated.

Another element related to the definitions of regions is the European Union’s neighbourhood itself: the ENP covers two, widely different regions, the Eastern and the Southern neighbourhoods (the ENP South is ‘hostage’ to the ENP East, and vice versa): in the East, partners are – at least in principle – potential members of the EU, while in the South they are excluded from this potential opportunity (a criticism raised from the South ever since the EMP was launched). Nevertheless, since the two neighbourhoods are both related to the European Union, recent political developments in both pose a serious challenge for the EU, over and above the distribution of the allocation of ENPI funds: namely, what are the consequences of

Present Euro-Med relationship is not between two regions as it may seem, but it is within one greater region (the Euro-Med), in which there is one big entity, the EU and the others are there ‘individually’.

The ENP covers two, widely different regions, the Eastern and the Southern neighbourhoods. Can the political-security situation in one neighbourhood block the EU’s action or ability to move forward in the other?

1. The two reviews of the ENP in 2011 and 2015, and the New Agenda for the Mediterranean are the best indicators.

the Russia-Ukraine war in and for the ENP South, and vice versa, what are the consequences of the war in Gaza for the ENP East? Can the political-security situation in one neighbourhood block the EU's action or ability to move forward in the other?

Structure - bilateral and/or regional

As some respondents in the survey noted, the "rise of the ENP as the main instrument for EU foreign relations with its Southern neighbours has entailed a shift of emphasis from region-building to bilateralism ... This may also indicate that the emphasis turned slowly but relentlessly away from the multilateral framework of the EMP and towards bilateral relations with the Southern neighbours as framed in the ENP". This may also imply that the regional elements within the European Neighbourhood Policy (ministerial meetings, regional programs) have not been convincing and seem to overlap with the regional programs and institutions of the EMP/UfM.

The EMP from the beginning was managing relationships both on a bilateral and on a regional level, while the ENP was started on the basis of bilateral relationships. The UfM became a kind of an extended version of the EMP, by adding the fourth pillar of the six great projects of mutual interest.

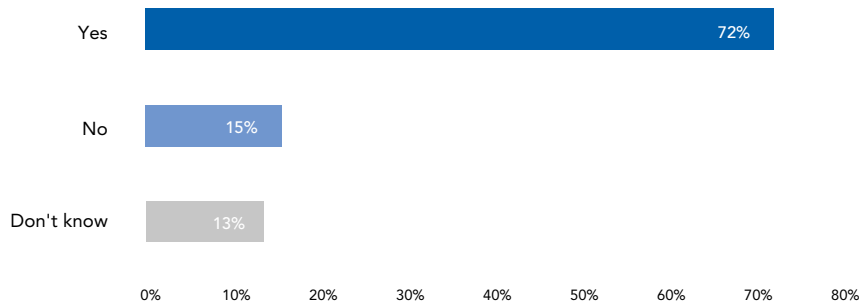
From the beginning, the EMP, was managing relationships both on a bilateral and a regional level, with regional institutions and programs, while the ENP was started on the basis of bilateral relationships. Although it was suggested that the bilateral/regional EMP would be included in the ENP Southern dimension, this seemed problematic from the very beginning, yet, it gave the impetus to further develop the Eastern dimension of the ENP (Eastern Partnership). The UfM became a kind of an extended version of the EMP, by adding the fourth pillar of the six great projects of mutual interest, signalling from the EU's side not only that the previously often mentioned criticism of a 'European dictate' was meant to change, but also adding to the regional understanding of the framework.

The fact that there is a difference in the partners of the ENP and the UfM, and also that the ENP covers two, widely different regions, the Eastern and the Southern neighbourhoods also further complicate the issue of bilateral vs regional relations, and is another reason why the overlaps and differences should be clarified. (All the riparian/littoral states of the Mediterranean are partners in the UfM, including the former Yugoslav non-EU members, except for Serbia, but the ENP South is still lacking such states as Türkiye and the former Yugoslav non-EU members.)

Substance – a distribution of labour?

According to the survey results, 72% of the respondents think that the overlap between the regional dimension of the ENP and the UfM introduces unnecessary confusion, and the EU should seek to simplify its mechanisms (but the opinions vary from the unification of the two to a clear distribution of labour between the two). (graph1)

Graph 1: Q.7a The overlap between the regional dimension of the ENP and the UfM introduces unnecessary confusion, and the EU should seek to simplify its mechanisms.



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

While some respondents even stated that the “UfM is dealing with the third and the fourth pillars only” (an opinion shared by several others), the UfM website seems to support this idea, when apart from the annual ministers of foreign affairs meetings practically no political and security related issues are on the agenda – and even these are usually discussed in the context of the third/fourth pillar issues’ context. (Annual Report 2022)

This distribution of labour goes further especially in these pillars as well, but to a certain (limited) extent in the ENP, too, when these institutionalised partnerships are struggling with the EU’s wish and desire to have an impact, not only on the state actors, but also on the societies, stakeholders and businesses, etc. There are several programs in which civilians are involved (e.g. the Erasmus program, etc.), yet, where the discrepancy between ‘state actors’ vs. ‘non-state actors’ is most evident is the Anna Lindh Foundation. The discrepancy was already manifested at the very beginning, when state-actors decided that non-state actors should build up a network and cooperate. Although by now it has been simplified to states providing finances for non-state actors’ projects, the mechanism of how to cooperate between state and non-state is not always easy.

ENP and UfM as institutionalised partnerships are struggling with the EU’s wish and desire to have an impact not only on the state actors, but also on the societies, stakeholders and businesses, etc.

It has to be noted, however, that it is not necessarily anyone’s fault: An examination of the state administrations – both within the EU, and in the South – would most probably show differences as to how and in which departments the different sections of both the ENP and the UfM are handled. In Hungary, for example, the ENP belongs to the Department of Common Foreign and Security Policy in the Ministry of Foreign Affairs and Trade (MFAT), which coordinates with the Department of the Middle East and North Africa on the ENP South, and with the Department of Eastern Europe on the ENP East. The financial tool of the ENP, the ENPI belongs to the competence of the Deputy State Secretary in charge of regional and cross-border developments. The UfM belongs to the Department of the Middle East and North Africa, which

is the direct contact point of the UfM Secretariat, and which forwards the relevant issues and information (economy, energy, cultural, etc.) to the relevant ministries to develop a common understanding. The Anna Lindh Foundation, because of its specific portfolio, belongs to the competence of the Ministry of Culture and Innovation, yet, Hungary's official, state-related representation at the ALF meetings – based on practical considerations – is usually performed by the MFAT.

Conclusion

The European Union has established institutionalised partnerships, not only with regional organisations, but with its two direct neighbourhoods, the East and the South. Due to the specific circumstances of times and places, the regionalisation, and the concept of looking at the South as one wide region, the Euro-Mediterranean started earlier. Based on the complex understanding of security towards and soon after the Cold War, the Euro-Mediterranean Partnership in 1995, later complemented to include six big projects, thus becoming the Union for the Mediterranean in 2008, has maintained the set of bilateral relations besides the overarching regional framework. The European Neighbourhood Policy, having its main focus on both the East and the South, and with the idea to spread European principles, mostly remained on the bilateral track.

Despite of the efforts by the European Union to maintain and even improve the regional dimension in its relations to the South, due to several reasons – as the Euromed Survey 2023 proves – this has not been successful. The above remarks aimed at pointing out the main structural and substantial issues to be addressed.

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Re-orienting priorities: Back to basics to value fundamental rights

Rabha Allam

Expert, Al-Ahram Center for Political and Strategic Studies (ACPSS)

The European Neighbourhood Policy (ENP) has been designed and launched in 2004 in order to extend the opportunities for stability, security and prosperity to the European neighbouring countries, both in the South and the East. Furthermore, as an alternative to the enlargement policy that was previously applied to specific countries on their EU's admission path, the ENP was expected to achieve much with fewer resources among a wider group of countries (Frappi, 2017). In this regard, evaluating the effectiveness of the ENP has always been a difficult task, especially in changing circumstances. Despite its revision several times in 2011, 2015, and 2021 to better target the priorities of cooperation between the EU and its Southern partners, the effectiveness of the ENP remains widely questionable.

Perceived Low Impact

Based on the figures of the EuroMeSCo Euromed Survey in 2023, the majority of respondents coming from both official and independent northern and Southern Mediterranean entities think the effectiveness of the ENP is low in several areas of action. Conflict resolution comes on the top of these areas as 85% of the respondents view the ENP's impact in the region as either 'low' or 'very low'. It is quite reasonable to receive such results given the ongoing war claiming thousands of civilian lives in Gaza and the incapacity of all actors, especially the EU, to propose and enforce suitable plans for a ceasefire. When first launched in Barcelona in 1995, the cooperation across the Mediterranean was born in a context of optimism for peace and prosperity for the whole region. Therefore, assessing the effectiveness of the main EU's instrument of this cooperation in the middle of a devastating war on the Southern shore would not help but question its *raison d'être*. Additionally, the EU, along with its partners, has been incapable of solving many extended conflicts in the South, be it in Syria or Libya, rather merely suggesting tools for conflict containment to stop its proliferation.

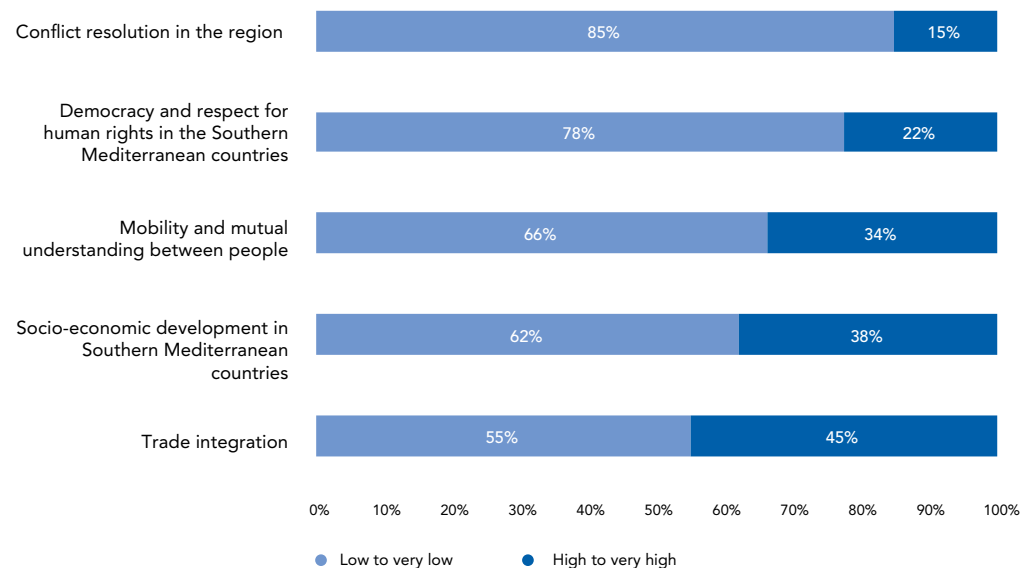
The ENP's low impact on the Southern neighbourhood was also perceived in the field of democracy and human rights promotion with a percentage of 78%, mobility

Assessing the effectiveness of the main EU's instrument of this cooperation in the middle of a devastating war on the Southern shore would not help but questioning its *raison d'être*.

Traditionally, there was a common conviction that a pragmatic trade-off should take place in the Euro-Mediterranean relations. However, survey results challenge this conviction.

and mutual understanding with 66%, socio-economic development with 62%, and trade integration with the EU with 55%. Traditionally, there was a common conviction that a pragmatic trade-off should take place in the Euro-Mediterranean relations; to enhance stability and economic advantages, the political pillar consisting of democracy promotion should be left behind. However, the survey results challenge this conviction by showing that neither stability nor democracy promotion were among the biggest successes of the ENP Southern cooperation as perceived by the respondents. On the contrary, maintaining stability via resolving conflicts and promoting democracy seems to be more intertwined than traditionally expected; whereas less dissatisfaction with the impact of ENP was perceived in the economic field especially in trade integration and socio-economic development. Hence, the pragmatic technical cooperation on the economic level has to some extent paid off in connecting both shores through trade and developmental projects.

Graph 1: Q.1 The European Neighbourhood Policy (ENP) was designed 20 years ago. It became the structuring framework of Euro-Mediterranean relations. Since then, to what extent do you consider that it has effectively impacted the following areas?

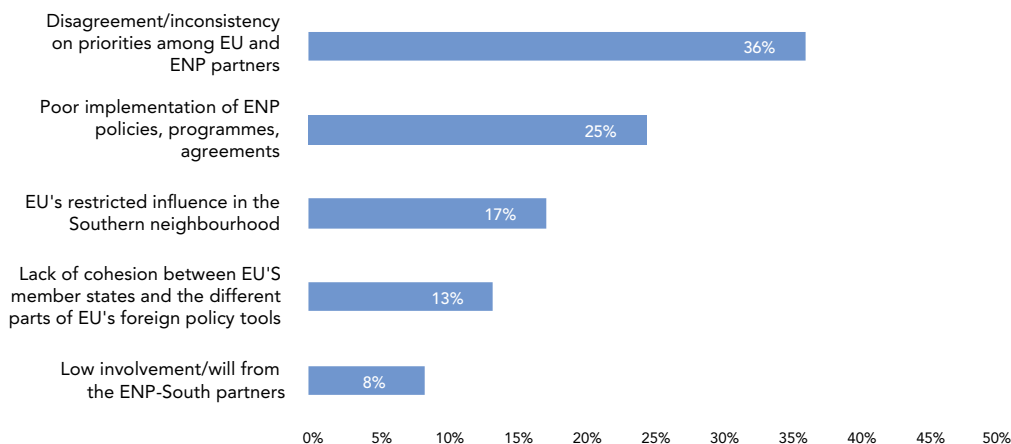


Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

Some would see the main obstacle impeding an effective ENP in the disagreement over identifying priorities of cooperation between the EU and the Southern partners (almost 36.2% of the respondents). The first explanation to that figure could be the Southern governments’ consistent rejection of any dictation regarding their internal governance when it comes to human rights and democratic process. However, the

disagreements might also emanate from the emphasize put by the EU on the irregular migration problem opposed to the developmental dimension that the Southern partners are more interested in.

Graph 2: Q.1 The European Neighbourhood Policy (ENP) was designed 20 years ago. It became the structuring framework of Euro-Mediterranean relations. Since then, to what extent do you consider that it has effectively impacted the following areas?



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

Meanwhile, almost 25% perceive the obstacle in the poor implementation of the ENP programs that prevent them from generating the expected success. Frequently, the implementation of the EU programs requires a rigid and sophisticated level of institutionalisation that might not be common to the Southern partners whether for the governmental or the non-governmental entities. This fact usually requires longer processes of adaptation and coordination that might be time-consuming, reducing thus the expected benefits of the cooperation. Nevertheless, another segment of the respondents sees the obstacles lying in the weak influence of the EU in the Southern neighbourhood, the low involvement of the Southern partners in the ENP's process, and the lack of consistency and cohesion between the ENP and other parts of the EU's foreign policy tools, with a percentage of 17.3%, 8.5%, and 13.5% respectively. These last three factors could be grouped to understand the dynamic of competition that the EU's role might face in the region when compared to other actors such as the USA, Russia, or China. Understandably, a national policy is by definition much easier to formulate and implement than a collective policy of a union of states. Therefore, the different policy tools applied by these competitors might seem more consistent and harmonised with their foreign policy, which naturally generates strong influence and engagement from the Southern countries.

The EU's role might face a dynamic of competition in the region. Compared to a collective policy of a union of states, USA, Russia or China can easily formulate and implement policy tools consistent and harmonised with their foreign policy.

The EU's Diminishing Credibility in the South

Apart from the strict figures introduced by the survey, there is a real crisis of credibility facing the EU's role in the Southern neighbourhood regarding adopting different stances toward similar issues (Venturi & Vallianatou, 2022). The different reactions coming from Brussels and other European capitals regarding the war in Gaza have greatly harmed the EU's image, especially when compared to previous reactions to the Ukraine war. The President of the European Commission Von der Leyen highlighting Israel's right of self-defense without equally urging it to respect the international law, has given the impression that the EU's foreign policy is subject to personal views, rather than institutionalised decisions. Likewise, the ad-hoc decision to suspend the European humanitarian aid to Gaza during the first week of war was widely received in the Arab Southern countries as a biased position automatically backing Israel in its collective punishment against Gaza (Wax & Barigazzi, 2023). Hence, the following decisions of increasing the EU's aid to the Palestinians have gone unnoticed and the effect of the first reactions has remained longer (Lynch, 2023).

Traditionally, the EU was seen as a neutral mediator and a reliable guarantor to the peace process in the Middle East. However, recently the American and the European stances are grouped to be judged as western partial positions backing Israel and turning a blind eye to the tremendously huge amount of civilian casualties in Gaza.

These mixed messages coming from the EU added to the popularity of anti-colonial arguments introduced previously to criticise the ENP in the South. All colonial explanations were given to justify the different stances that the EU has shown to the wars in Ukraine and in Gaza (Gray, 2023). Traditionally, the EU was seen as a neutral mediator and a reliable guarantor to the peace process in the Middle East. However, recently the American and the European stances are grouped to be judged as Western partial positions backing Israel and turning a blind eye to the tremendously huge amount of civilian casualties in Gaza. The Western media are seen completely biased when adopting the Israeli narrative of the war and almost entirely excluding the Palestinian narrative (Shehata, 2023). The fundamental rights of humans are not valued equally but according to their nationality and skin colour (Jones, 2023). Double standards, media bias and colonialism were frequently used to describe the position of western governments with little differentiation among them.

Meanwhile, the stances of Spain, Ireland, Portugal, and Belgium insisting on maintaining humanitarian aid to the Palestinians were received as individual positions, not representing the whole European bloc. Nonetheless, these positions are much more loyal to the traditional stance of the EU in previous episodes of the Middle East conflict and should not be regarded as an exception (Kassam, 2024).

In an open letter, a group of Arab intellectuals called upon Western intellectuals to show their real adherence to the universal values of freedom, justice, human dignity and human rights by announcing their solidarity with the Palestinian cause. The letter addressed by a group of writers, researchers, artists and poets, emphasised a huge gap between the rhetoric of the Western culture and the actual positions of Western intellectuals, let alone Western governments (Ourouba22, 2023). Others have questioned the degree of inclusiveness of Western democracy, usually set as an example to follow, if the media was biased and the views of peace movements calling for a ceasefire are not taken into consideration when deciding on national or European foreign policy.

Consequently, the repercussions of this continuing war in Gaza have not only harmed the EU's legitimacy as a normative power, but also questioned it as a credible partner if compared to other actors. For instance, Russia and China were perceived in the Southern neighbourhood as less biased towards the Palestine/Israel conflict and for sure less demanding in terms of democracy promotion. And in a context of accelerated animosity towards the West, both countries appear as perfect partners to the region to substitute the Northern neighbours, especially in trade ties and developmental projects.

Additionally, the continuing war in the neighbourhood does not serve by any means the main purpose of ENP in terms of extending peace and prosperity in the Southern neighbourhood. On the contrary, the continuous bloodshed in Gaza accentuates the appeal of the use of violence both regionally and domestically. On one hand, the non-state actors involved in the conflict are getting more and more popular in the eyes of the public, since no other mechanism of justice for Palestine is in action. On the other hand, Iran as the main backer of these non-state actors is seen as the sole regional power capable of supporting the Palestinians militarily, when other channels of support are blocked. Furthermore, the continuous bloodshed constitutes an ideal argument for grievances to be easily misused by violent extremist groups to recruit youth for attacking whether the local governments or the western interests in the region. Apart from the organised attacks directly planned and supported by violent extremist groups, lone wolves' attacks are very likely to occur both in the Southern and the Northern Mediterranean countries.

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Conclusion: Ways out of the Polarisation

Crises could be an ideal moment to introduce alternatives and opportunities. The Covid-19 crisis was an opportunity to realise that the concept of shorter and nearer supply chains could bring the Northern and Southern Mediterranean closer to enhanced trade partnerships. The Ukraine war was an occasion for the EU to look for better energy deals on the Southern shores of the Mediterranean. Following the same rationale, the war in Gaza should be seen as an opportunity for the EU to emphasize its normative power and to help enforce justice, and freedom and restore the respect of human and fundamental rights.

A basic needs approach should be put forward in the current situation to reinitiate the diminishing credibility of the EU. A strong political leverage should lead the rationale of the ENP to ensure that extremely disproportionate violence is not tolerated in this space if we are to think of the best mechanisms and tools for long-term cooperation and interdependency. The different components of the ENP were usually seen as working in parallel, not in a hierarchal pattern of progress. However, this devastating war in Gaza should act as a locomotive to advance the importance of the political component as a prerequisite to ensure the ability of other components to advance.

A strong political leverage should lead the rationale of the ENP to ensure that extreme disproportionate violence is not tolerated in this space.

Therefore, when reorienting the priorities of the ENP, one cannot think of better solutions for climate change and decarbonisation without thinking first of restoring

When reorienting the priorities of the ENP, one cannot think of better solutions for climate change and decarbonisation without thinking first of restoring the value of the human life.

the value of human life. Protecting civilians, preventing their forced displacement, and guaranteeing their safe access to human assistance should come on top of all priorities. Humanitarian organisations should be preserved and spared from politicisation or polarisation; their funding should not be used as a bargaining card in collective punishment, their resources should be augmented rather than decreased (Ebeid, 2024).

In such a serious context of polarisation and militarisation in the Southern neighbourhood, the last thing the region needs is a biased EU which takes sides. On the contrary, the best option for the EU is to regain its role as a fair mediator credibly willing to use its leverage to stop war and encourage peace. A balanced position of the EU will help pave the way to create suitable circumstances leading to a detailed plan for a ceasefire, constant and safe access to humanitarian assistance to Gaza and a comprehensive scheme linking these steps to the two states final solution. Other partial solutions would not help anymore in containing the conflict; rather it would create consecutive and wider episodes of confrontations and would likely empower the extremists on each side to lead ahead.

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The new Euro-Mediterranean context: What direction for the Morocco-European Union partnership?

Pr. Rachid El Houdaigui
The Policy Center For The New South (Rabat)

Introduction

In 2004 the European Neighbourhood Policy (ENP) became the policy framework setting the scene for EU interactions with its neighbours. The launch of this policy framework occurred in a context of relative stability and peace in Europe's neighbourhood, at a time when the EU was redrawing its borders through the 2004 big bang enlargement. Nonetheless, the ENP was doomed to face a panoply of conflicts, crises, and even wars. No other policy framework in the EU encountered so many challenges across time and policy sectors. Twenty years on, the EuroMeSCo Survey reveals a widespread disillusionment about the effectiveness of the ENP impact on priority areas for EU interactions with the Southern Neighbourhood. A disillusionment that couples with the perceived need to change the current ENP, either through another revision of it or through its complete renovation as a policy framework. How did we get here? And what could we do to relaunch the ENP?

The Mediterranean dynamic is unfolding in the shadow of a major geopolitical and geo-economic shock, following the combined effects of the Covid-19 health crisis, the Russia-Ukraine war, and Sino-American rivalry. One of the visible consequences is a shift in the paradigms that have so far framed international relations and, by extension, the Euro-Mediterranean parameters. Liberal globalisation and its corollary interdependence increasingly come up against the rise of neo-protectionist and interventionist practices. The global political economy seems to be reconceptualised around vague and imprecise notions such as sovereignty and economic security, energy autonomy and strategic autonomy.

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This article aims to draw up a portrait of the new dynamics that we believe are relevant to the Euro-Mediterranean debate in general, and to the modernisation of the Morocco-EU partnership in particular: 1) the neo-protectionist trend in EU trade policy; 2) multi-scale threats and risks in the Mediterranean; 3) an ongoing change in the geopolitical status quo; 4) New Moroccan ambitions.

The neo-protectionist trend in EU trade policy

Liberal globalisation is struggling to withstand the geopolitical and geo-economic consequences of the Covid-19 pandemic, the war in Ukraine, and the growing rivalries between the USA and China, and probably between the West-Global South. Neo-protectionism, interventionism, and normative and/or judicial extraterritoriality are today the hallmarks of a new area in which the maintenance of open markets is being altered by issues considered more important, such as economic security, energy autonomy, supply chain resilience, or technological supremacy.

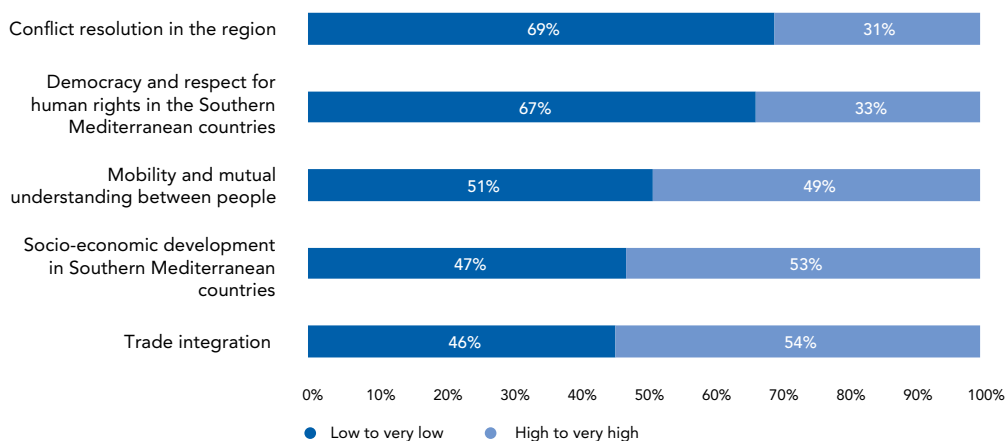
The EU has become a force that issues standards and jurisdictional rulings, some of which risk harming the interests of third countries.

In this context, the EU, concerned about its economic dependence on China and the United States trade policy (Inflation Reduction Act¹), is adopting a package of measures from 2022 onwards that will have no impact on its Mediterranean partners: the carbon tax; the anti-deforestation law; rules to combat foreign subsidies, the anti-coercion instrument; the Green Pact industrial plan; the directive on the duty of care of companies to operate fairly and sustainably throughout their value chain. These measures reveal a long-underestimated factor: the weight of law and legal standards in European trade policy. The EU has become a force that issues standards and jurisdictional rulings, some of which risk harming the interests of third countries.

Three major trends emerge from this new situation:

- The shift in the EU's degree of openness is leading to a new strategy for multilateral negotiations, bilateral trade agreements, and unilateral trade measures. This means that future negotiations will need a new economic-political consensus while bilateral (1+1) and/or regional (1+12) economic interdependence remains the final objective sought by the partners. As such, the EuroMeSCo Survey sends an important signal, namely that 54% of Moroccans appreciate the contribution of the ENP to economic integration (see Graph 1.).

Graph 1: Q.1 The European Neighbourhood Policy (ENP) was designed 20 years ago. It became the structuring framework of Euro-Mediterranean relations. Since then, to what extent do you consider that it has effectively impacted the following areas? (Moroccan respondents)



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

- Indeed, the eventual resumption of negotiations for a Deep and Comprehensive Free Trade Agreement (DCFTA) between Morocco and the EU, suspended in 2014, must take into account three challenges: 1) the inclusion of new European regulatory measures; 2) Morocco's new economic priorities and orientations; 3) the weight of European judicial extraterritoriality. These factors are all the more important as they impact all the agreements previously signed by the two parties. Firstly, the carbon tax, foreign subsidies, anti-coercion, the green pact, and corporate social responsibility throughout their value chain would require a colossal effort to converge standards, with no reluctance on Morocco's part. Secondly, the future agreement needs to be adapted to changes within the national economy, so that its impact on the national productive fabric and the socio-economic sector is guaranteed. Finally, the European court rulings on the territoriality of agricultural and fishing agreements concerning the Sahara provinces raise fundamental questions about the future of the Morocco-European relations model².
- Furthermore, agreements with the EU are increasingly global. They cover not only economic aid but also political issues such as migration. After signing similar agreements with Tunisia, Mauritania, and Egypt, the EU must negotiate another agreement with Morocco. While some see this trend as giving partners considerable leverage, given the high expectations of Europeans in particular, others believe that expanded negotiations would expose partners to brutal conditionality. Their negotiating capacity is reduced by the link between financial payments under the agreement of compliance

Agreements with the EU are increasingly global. They cover not only economic aid, but also political issues such as migration.

with commitments in the field of migration control. In fact, it is less the usefulness of this type of agreement that poses problems than the risk of partner countries substituting certain commercial interests for financial aid.

Multi-scale threats and risks in the Mediterranean

Threat perception and localisation have always been oriented towards the Southern shore, perceived as the sole source of instability. However, the new geopolitical and security situation undermines this certainty, as the nature and geography of the threat have changed.

The biggest accommodation effort is that of redefining relations between the two shores based on the new grammar of the threat in the Mediterranean. Threat perception and localisation have always been oriented towards the Southern shore, perceived as the sole source of instability. However, the new geopolitical and security situation undermines this certainty, as the nature and geography of the threat have changed. Today, we can legitimately speak of a multi-scale threat.

The war in Ukraine and the struggle for influence between Russia and the Western states have arisen at a time when the global geopolitical situation is very tense due to the weight of Sino-American rivalry. The Mediterranean is suffering the consequences of this struggle for influence, both in terms of posture and functionality. During the Cold War, it was referred to as NATO's "Southern flank" for its strategic role in the Alliance's anti-Soviet defense system, just as it was a pillar of the Soviet defense system. Today, after several years of strategic vacuum, all the signs confirm the Mediterranean's return to the status of a theatre of NATO-Russia power relations and security levelling. The new situation paves the way for the comeback of sea power and the maritimisation of power relations in the region, making the situation even more unpredictable.

The Southern shore does not yet have a collective security governance system capable of guaranteeing a united and comprehensive response to the new asymmetrical "crisis inducing" factors. Political instability in Libya and the Sahel continues to encourage the mobility of these networks and the emergence of certain "destatised" zones, particularly in the Sahel. These networks flourish in a corridor of vulnerability stretching from the Mediterranean to the Atlantic.

The stability of the Mediterranean is therefore no longer exclusively linked to considerations inherent to this area but has also become dependent on the stability of other peripheral regions in Africa (Sahelo-Saharan strip, Atlantic seaboard). Moreover, the terrorist threat is no longer confined to the South. The series of attacks that have hit a number of European countries has revealed the continental reach of radical Salafists. The rise of these European networks poses a threat to both Europe and North Africa, given the ease with which they can move between the two shores, particularly in a North-South direction.

Illegal migratory flows have returned to their usual pace following the end of the Covid-19 health crisis. Galloping demographics combined with climate change (drought) and a persistently fragile economic situation are having an impact on the day-to-day lives of populations, and fostering the conditions for migratory flows, particularly towards the Mediterranean and beyond. This situation is causing security stress in North Africa and Europe, especially as clandestine migration is far from

being a transitory phenomenon that can be eradicated by strictly punctual means. Thus, when Europe signs migration agreements with its partners, it ultimately treats only the symptoms. What's more, the brain drain encouraged by selective European policies is depriving the countries of the Southern shore, Morocco in particular, of the vital forces needed to support its economic development.

One of the lessons learned from the current situation is the need for a new political paradigm that will take into account these new endogenous and exogenous dynamics. It is a Moroccan and Southern Mediterranean conviction as the results of the survey reveal. Indeed, 69% of Moroccans are aware that conflicts and rivalries in the Mediterranean area exceed the capacities of regional cooperation mechanisms (see Graph 1.).

The geopolitical status quo in the Mediterranean is changing

Global tensions are accelerating the redistribution of geopolitical and geo-economic maps. Since 1990, the regulation of the Mediterranean, through cooperation and the control of violence, has been and remains Western. However, the tectonics of geopolitical plates has brought powers to the surface of the Mediterranean that are challenging European and American pre-eminence in the region:

- Russia's return to the Eastern Mediterranean and China's rise of power in the region as a whole is creating a new dynamic that is fraught with both constraints and opportunities for the countries on the Southern shore of the Mediterranean.
- Turkey's positioning as a key player and regulator on the Mediterranean stage.
- Developments in the Libyan situation have shown how the stagnation of the crisis and the incoherence of the European powers have opened the way to many players who are now part of the solution (Russia, Gulf states, etc.). Its strategic dimension (NATO military intervention) and implications exceed the capacities of the Arab League, the Arab Maghreb Union, and continental institutions (African Union, EU). Since then, the country and the region have been caught up in a contradictory power game.
- Security and stability in the Euro-Mediterranean region remain intimately linked to the outcome of the Israeli-Palestinian conflict. Admittedly, the centrality of this issue is not new, but the war in Gaza augurs a change in the representation of this conflict. From now on, perceptions of the conflict are no longer purely political; they are based on identity, centered on religious convictions, and exploited by extremists of all sides. Today, international mobilisation is more necessary than ever to establish international legality in the Middle East, by guaranteeing the right of the Palestinian people to a viable state.

Global tensions are accelerating the redistribution of geopolitical and geo-economic maps. The tectonics of geopolitical plates has brought powers to the surface of the Mediterranean that are challenging European and American pre-eminence in the region.

- The acceleration of events since 2021 in the Maghreb and the Strait of Gibraltar has completely overturned the status quo that prevailed in the region. American recognition of the Moroccan Sahara, the resumption of relations with Israel, and Morocco's desire for strategic autonomy have all contributed to a geopolitical recomposition favourable to Morocco and Spain.

Furthermore, it is necessary to add a European trend observed since the Arab Spring (2011), that of replacing democratic priority with political stability in relations with the Southern shore. This shift, which takes into account the fear of seeing certain countries slide into instability, explains, in part, the doubt expressed by 67% of Moroccans concerning the impact of the ENP on democratic consolidation and respect for human rights in North Africa and the Middle East (see Graph 1).

Morocco's new geopolitical and geo-economic ambitions

Like any process, Morocco-European relations are a series of phases and stages, with achievements, inconsistencies, and limitations that call for joint reflection on effective responses to improve the partnership. For Morocco, relations with Europe are a fundamental asset that must be consolidated for a new, deeper, and broader partnership³. The Moroccan position could be inspired by several major issues. The fundamental challenge for Morocco's foreign policy is to find the best balance between, on the one hand, managing interactions with the West, held by the weight of history and geography, and on the other, adhering to a South-South community of geo-economic interests. Morocco's objective is to build and/or consolidate its own links between the North-South pattern and the Latin America-Africa-ASIA cooperation axis.

A number of new players, including China, India, Brazil, the Gulf States and Turkey, offer attractive new prospects. Morocco has thus entered an era of choice, which should not be interpreted as a structural reversal of its orientations.

In this sense, the United States and Europe, while strategic partners are no longer the only ones to exert an influence on Morocco's strategic orientations. The war in Ukraine and the Sino-American rivalry reveal three lines of conduct: 1) self-assertion and sovereignty, which translates into autonomous decision-making in foreign policy; 2) the consolidation of historic gains with the USA and the EU, the relevance of the economic partnership with China, and the shift towards sub-Saharan Africa, in search of new economic, political, and diplomatic frontiers⁴. Global strategic competition is therefore seen as highly favourable, as the involvement of emerging powers is multiplying and diversifying international partnerships. Some new players, including China, India, Brazil, the Gulf States, and Turkey, offer attractive new prospects. Morocco has thus entered an era of choice, which should not be interpreted as a structural reversal of its orientations.

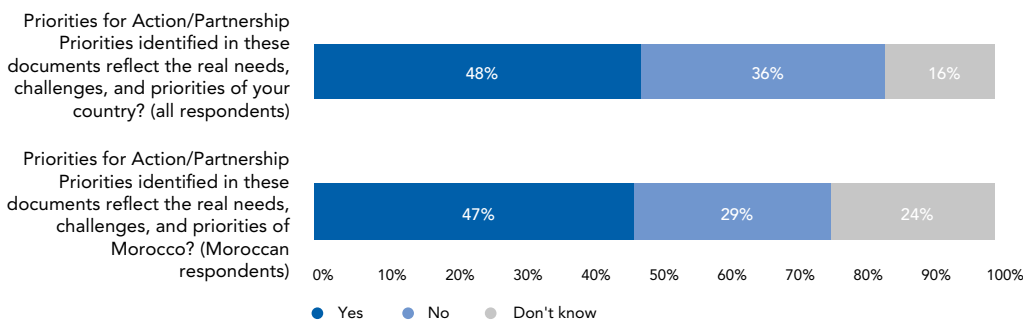
The challenges are both economic (economic prosperity of the country, Global Value Chain [GVC]) and geo-economic (efficient African economic and financial hub). The first calls for the mobilisation of the State to focus this part of the partnership with the EU on the country's main industrial ecosystems: phosphates-fertilizers, automotive, agri-food, and aeronautics. The integration of these ecosystems into the GVCs has been stepped up, enabling the Moroccan economy to become one of the few in the MENA region with a rate of participation in the GVCs similar to – or even higher

than – emerging countries such as Russia, India, or Turkey⁵. In this context, the re-launch of the partnership must be done based on the ENP economic achievements. In fact, 53% of Moroccans positively appreciate the effects of these instruments of socio-economic development in the South (see Graph 1).

The geo-economic dimension, meanwhile, has a regional value, since Morocco needs geo-economic depth, particularly in North-West Africa, as an alternative to the Maghreb blockage. The Morocco-Nigeria gas pipeline project, the Atlantic Initiative for the Sahel⁶, and the opportunities offered by the African Continental Free Trade Area (AfCFTA) confirm this orientation. The State’s ambition is to create the right conditions for a stable geo-economic North-South and South-South positioning, with the Strait of Gibraltar, port and air infrastructures, and the depths of West Africa as junction and connection points. However, the question of Morocco’s ability to mobilise the necessary economic resources and political support remains. While the commitment of the Gulf partners seems to be a given, that of Europe, on the other hand, remains to be negotiated, particularly with a view to modernising the Morocco-EU partnership.

It goes without saying that the partnership with the EU needs both new ideas and political commitments for better implementation of action plans. Some institutional constraints arose in the realisation of various plans, which were nonetheless developed based on the principle of ownership around Moroccan priorities. (Graph 2).

Graph 2: Q.8a Do you think the Priorities for Action/Partnership Priorities identified in these documents reflect the real needs, challenges, and priorities of Morocco? (Moroccan respondents)



Source: Compiled by the IEMed based on the results of the 14th Euromed Survey

Conclusion

Morocco-European relations need a new model of partnership, rebalancing expectations on both sides, promoting dynamic, inclusive, and productive growth that reduces Moroccan vulnerabilities and consolidates economic interdependence.

The strategic changes underway are opening up new prospects fraught with uncertainties and opportunities for Morocco-European relations and for the Mediterranean as a whole. The diplomatic agenda looks set to be a busy one. The process of adaptation is not without its inconveniences, but it is made necessary by national and multilateral strategic shifts. The stakes of present and future choices call for joint reflection on the convergences and complementarities that the Mediterranean needs to overcome current challenges. Morocco-European relations need a new model of partnership, rebalancing expectations on both sides, promoting dynamic, inclusive, and productive growth that reduces Moroccan vulnerabilities and consolidates economic interdependence.

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The future of EU-Southern Neighbourhood trade relations. The FTAs are dead, long live the (DC)FTAs?

Katarzyna W. Sidło

Director of MENA Department, CASE – Center for Social and Economic Research.

EU-SN trade exchange

Trade relations are an important part of European Union's (EU) relationship with countries in its Southern Neighbourhood (SN), currently governed by trade chapters of the Euro-Mediterranean Association Agreements signed between 1995 and 2002 (henceforth: FTAs). The relationship is far from straightforward, though, and partner countries have been raising a number of issues and concerns regarding their effectiveness and efficiency over the years (CASE – Center for Social and Economic Research et al., 2021). A crucial complain regards the extent to which the relationship is asymmetric: while the EU is the main trading partner for eight out of ten countries in its Southern Neighbourhood (all but Jordan and Palestine), the exchange of goods with the SN accounts for only 4.8% of EU's trade (as of 2022) (European Commission, 2022). As the FTAs were signed two and, in some cases, three decades ago, they are "old generation" deals: their scope is limited, and provisions are outdated, despite additional protocols being signed with some of the partner countries over time. At the same time, implementation of the provisions that are in place is limited. Finally, many privileges stemming from the AAs have eroded over time, as the EU has been signing more modern and comprehensive trade deals with other countries (CASE – Center for Social and Economic Research et al., 2021). Overall, both the partner countries and the EU are unsatisfied with the current state of the mutual trade relationship and with the rules that govern it, and the debate on how the situation can be improved has been ongoing for over a decade now.

Over the years the EU's partner countries have been raising a number of issues and concerns regarding FTAs effectiveness and efficiency.

As a solution, (DCFTAs), aimed to integrate the economies of the partner countries into the EU market.

A solution suggested by the EU was the signing of Deep and Comprehensive Free Trade Agreements (DCFTAs), something offered to countries in the Eastern Partnership countries as well. The general idea behind the DCFTAs is to integrate the economies of the partner countries into the EU market as “deeply and comprehensively” as possible for a non-EU member state. As already mentioned above, the FTAs currently in place are seriously limited in their scope and exclude areas such as investment, trade in services, public procurement, intellectual property rights, competition, or sustainable development. DCFTAs would cover all these areas, harmonising trade-related rules and regulations of the SN countries with relevant EU legislation and international standards (CASE – Center for Social and Economic Research et al., 2021).

Just as the democratisation dreams of the populations across the Southern Mediterranean have not materialised, not much progress has been made on the DCFTA negotiations process either.

A green light to commence negotiations on the DCFTAs with Egypt, Jordan, Morocco, and Tunisia was given by the Council of the EU to the European back in 2011, following the onset of the Arab Uprisings (European Commission, 2011). However, just as the democratisation dreams of the populations across the Southern Mediterranean have not materialised, not much progress has been made on the DCFTA negotiations process either.

Years in the making

Negotiations with Morocco and Tunisia, ongoing since 2013 and 2015 respectively, have been stalled. The former suspended the process in 2014, following the first round of negotiations, in order to conduct its own evaluation of the potential impacts of the DCFTA. Nearly ten years later, negotiations are yet to be officially resumed, despite completion of the said evaluation, as well as the 2019 joint EU-Morocco declaration for the 14th meeting of the Association Council mentioning the relaunch of the negotiation process (a step enabled by adjusting EU-Morocco agricultural and fisheries agreements in order to satisfy a ruling of the Court of Justice of the European Union regarding their applicability to territories of the Western Sahara) (Council of the EU, 2019).

In case of Tunisia, four full rounds of negotiations took place between April 2016 and May 2019 (Sidło & Cohen-Hadria, 2022). The Strategic Priorities for EU-Tunisia partnership currently in place stress that “[b]oth sides remain fully committed to the process of negotiations towards a Deep and Comprehensive Free Trade Agreement (DCFTA)” (EU-Tunisia Association Council, 2018). While a “concrete action plan for 2018” was supposed to be made in order to accelerate the negotiation process to finalise it “as soon as possible” (EU-Tunisia Association Council, 2018), the process is at a standstill.

As for Egypt and Jordan, negotiations have not even commenced yet. Tellingly, while Partnership Priorities for both countries for the previous programming period contained references to DCFTAs (EU-Egypt Association Council, 2017), the 2021-2027 priorities for Egypt and 2022-2027 priorities for Jordan do not (EU-Egypt Association Council, 2022; EU-Jordan Association Council, 2022).

Why the delay? Main criticism towards the DCFTAs

The protracted nature of the (pre)negotiation process is closely related to the level of controversy surrounding the DCFTAs themselves and the resulting lack of appetite towards their implementation in partner countries, both among the civil society and the private sector, as well as authorities (CASE – Center for Social and Economic Research et al., 2021; Institut Arabe des Chefs d'entreprises [IACE], 2017; Sidło et al., 2021). As noted by some of the respondents to this year's EuroMeSCo Euromed Survey, DCFTAs have become highly politicised, with entire social movements and campaigns held against them (for instance, a powerful Tunisian General Labour Union UGTT led a "National Coordination of the fight against DCFTA") (Magnan, 2019).

The protracted nature of the (pre)negotiation process is closely related to level of controversy surrounding the DCFTAs themselves and the resulting lack of appetite towards their implementation.

What is their main criticism towards the DCFTA?

In most general terms, and as indeed pointed out by Euromed Survey respondents from both the EU and SN, the DCFTAs are denounced for reflecting priorities of Brussels and not those of the partner countries, not being flexible enough, and not taking into consideration specificities of individual partner countries.

Fears pertain to the economic impact of the DCFTA on the already troubled economies of the countries in the SN, most importantly the cost of legal approximation, the risk of bankruptcy of local SMEs unable to compete with EU-based businesses, and resulting disturbances in the job market. Particular concerns are voiced by NGOs, CSOs and unions regarding potential adverse impacts on the agricultural sector in partner countries: the difficulty and costliness of adjusting to EU food and safety (SPS) regulations, the inability to compete with EU-based farmers (who enjoy subsidies from Brussels), and further increase of dependence of food imports (Magnan, 2019; Aouadi, 2020; Kaiser, 2019; CCFD-Terre Solidaire, 2019).

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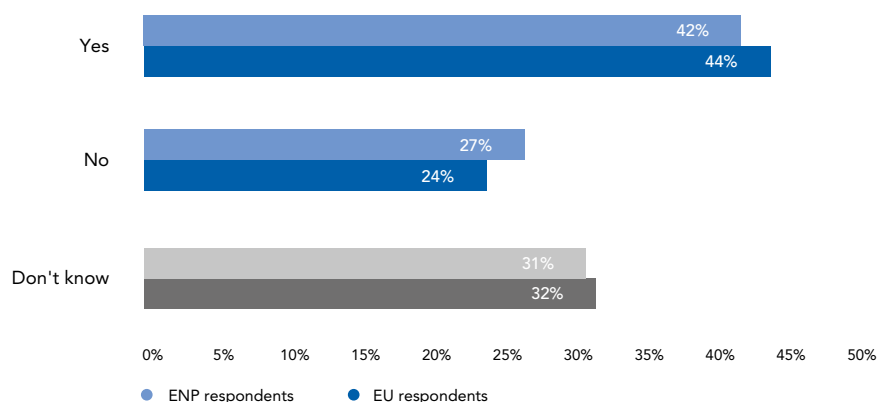
The requirement to harmonise local regulations and standards with relevant EU legislation is raising concerns, not just due to its cost and complexity, but also because it is seen by some as a threat to national security. Countries in the SN, unlike those in the EaP, are not motivated by the prospect of EU membership and as such, a process of legal approximation, if additionally monitored and evaluated by the EC, is viewed by some as handing over too much control to a foreign power (Van der Loo, 2021).

Finally, as noted by respondents to the EuroMed Survey, limiting the DCFTA to the free movement of goods and services but not of people is not in the interest of the partner countries. Indeed, granting temporary freedom of movement for business purposes is of key importance for both Moroccan and Tunisian governments, who moreover wish to tie DCFTA negotiations with talks on Visa Facilitation Agreement – something that Brussels is unwilling to consent to (Sidło & Cohen-Hadria, 2022).

Are the DCFTAs still the best paradigm for improving EU-SN trade relations? With all the above-listed criticism in mind, the question that arises is whether the DCFTAs are still the best paradigm to advance better trade relations between the EU and its Southern Mediterranean partners? The plurality (44%) of those who contributed to

this year's EuroMed Survey believe that the answer is yes, with respondents from the SN countries only slightly less enthusiastic about the DCFTA (by 2 p.p.) than those from the EU.

Graph 1: Q.11 Do you think DCFTAs are still the best paradigm to advance better trade relations between the EU and its Southern Mediterranean partners?



Source: Compiled by the IEMed based on the results of the 14th EuroMed Survey

An undisputable advantage of the negotiations process is giving partner countries a push for reforms. It is generally accepted even by those most critical of the DCFTAs that economies of partner countries in the SN are in dire need of a reform, and agreements could provide a framework – and EU support – to do just that (see. eg. Aoudi, 2020).

A significant effort would need to be made to include civil society, NGOs, and private sector in the partner countries into the negotiation process and convince them to remain open-minded.

There are a number of caveats to take into account, however (as indeed noted by a number of respondents to the EuroMed Survey). Most importantly, both sides would need to be fully dedicated to the negotiation process and willing to make real concessions. Additionally, significant effort would need to be made to include civil society, NGOs, and the private sector in the partner countries in the negotiation process and convince them to remain open-minded; this was not always the case in the past, even though views diverge here between EU, local authorities and local stakeholders. In case of Morocco, the question of inclusion of Western Sahara into the DCFTA would have to be addressed as well.

Realistically, in the foreseeable future, the chances of signing a DCFTA with Morocco and Tunisia are slim, and with Egypt and Jordan (or other countries in the SN for that matter) – practically non-existent. As such, other formats of reshaping the trade and investment relationship between these countries and the EU are being considered (Sidło & Cohen-Hadria, 2022).

Alternative routes

One alternative option of reviving the existing trade relationship between the EU and its partner countries in the SN is modernisation of the existing FTAs, as suggested by the EU's Trade Policy Review – An Open, Sustainable and Assertive Trade Policy (European Commission, 2021) and a joint statement published during the 11th Union for the Mediterranean (UfM) Trade Ministers Conference that took place in November 2020 (although it is unclear to what extent this idea was supported by SN members of the UfM (Sidło & Cohen-Hadria, 2022)). However, while decidedly less ambitious than signing a DCFTA, modernising the existing FTAs might also prove too challenging as all the “least problematic” sectors such as industrial goods have already been liberalised and it is the challenging parts that remain to be agreed on (Van der Loo, 2021; Sidło & Cohen-Hadria, 2022).

Should that be the case, a “revival” of the FTAs might be considered – an objective (albeit admittedly not very clearly set one) more in line with the 2021-2027 priorities for Egypt and 2022-2027 priorities for Jordan which mention working closely to “strengthen[en] the existing trade and investment relationship” in place of referencing DCFTA as Partnership Priorities for previous periods did¹.

The alternative of modernising the existing FTAs might also prove too challenging as all the “least problematic” sectors such as industrial goods have already been liberalised and it is the challenging parts that remain to be agreed.

Way ahead

With no easy solution in sight and no real hope for signing the DCFTAs soon, it might be worth for the EU and the partner countries in the SN to take another route floated more recently – one of signing stand-alone investment agreements. One of the most often voiced criticisms towards the FTA by the partner countries has been insufficient investment coming from the EU (even if, as already mentioned, FTAs do not cover investment issues; (CASE – Center for Social and Economic Research et al., 2021)). The EU, in turn, has even, since the outbreak of the Covid-19 pandemic been voicing a need to relocate at least part of its production closer to its borders, or of the so-called nearshoring/friend-shoring (Sidło et al., 2021).

Working out an investment deal satisfactory to both sides will not, admittedly, be an easy process, especially given the political situation in the SN. Among a number of obstacles to increasing EU's FDI in the SN, improving business climate in the partner countries will be the most challenging one to overcome, requiring a lot of political will. With enough dedication and sufficient support on part of the EU (both financial and technical), progress is achievable – or at least more attainable than a fully-fledged DCFTA.

With no easy solution in sight and no real hope for signing of the DCFTAs soon, it might be worth for the EU and the partner countries in the SN to take another route floated more recently – one of signing stand-alone investment agreements.

1. Indeed, after the present text was completed, EU and Egypt elevated their relationship to strategic and comprehensive partnership, agreeing to “fully implement and unleash the full potential of the Free Trade Area of the Association Agreement” and “explore various forms for the modernisation and review of the Association Agreement on the issue of trade and investment relations to better adapt them to today's challenges.” https://neighbourhood-enlargement.ec.europa.eu/news/joint-declaration-strategic-and-comprehensive-partnership-between-arab-republic-egypt-and-european-2024-03-17_en

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