

# A new agenda for the Mediterranean: Are the EU tools and means of action up to its ambitions?



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## STUDY

# A new agenda for the Mediterranean: Are the EU tools and means of action up to its ambitions?

### ABSTRACT

The Southern Neighbourhood (SN) of the European Union (EU) remains in what appears to be a state of permanent turmoil. Similarly, the rift in Euro-Mediterranean relations seems to be growing, as exemplified by reactions to the Russian aggression on Ukraine across the SN region and despite a window of opportunity the pandemic offered to relaunch cooperation between both sides of the Mediterranean. The Joint Communication on a 'Renewed partnership with the Southern Neighbourhood: a New Agenda for the Mediterranean', released in February 2021 and endorsed by April 2021 Council conclusions, is an attempt at addressing both the above mentioned rift, and the multitude and magnitude of challenges facing societies and economies of the SN countries. The present study considers whether the Joint Communication is well-fitted to achieve these goals. Accordingly, it first undertakes an analysis of the geopolitical trends and megatrends, of the political, and socio-economic situation in the region, and the state of Euro-Mediterranean relations. Subsequently, it looks into the text of the Joint Communication and the accompanying Economic and Investment Plan, exploring their potential for launching a new phase in this relationship in the areas of green and digital transitions, promotion of 'inclusiveness', migration, trade, and peace and security. The study concludes that more than a year after its adoption, many question marks remain in relation to the implementation of the Joint Communication, and a truly comprehensive and strategic framework to guide the EU's relations with its SN is still missing.

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## Abbreviations

AFET	Committee on Foreign Affairs
BRI	Belt and Road Initiative
CFSP	Common Foreign and Security Policy
CPI	Consumer Price Index
CSDP	Common Security and Defence Policy
DCFTAs	Deep and Comprehensive Free Trade Agreements
DEVE	Committee on Development
DG NEAR	Directorate-General for Neighbourhood and Enlargement Negotiations
DG TRADE	Directorate-General for Trade of the European Commission
EaP	Eastern Partnership
EBRD	European Bank for Reconstruction and Development
EC	European Commission
EEAS	European External Action Service
EFSD+	European Fund for Sustainable Development Plus
EIB	European Investment Bank
EIP	Economic and Investment Plan
ENI	European Neighbourhood Instrument
ENP	European Neighbourhood Policy
EP	European Parliament
EPF	European Peace Facility
EU	European Union
EUBAM	EU Border Assistance Mission
EUR	Euro
EUSR	EU Special Representative
FDI	foreign direct investment
FTA	free trade agreements
FTF	foreign terrorist fighters
GCTF	Global Counterterrorism Forum
GDP	gross domestic product
GDPR	General Data Protection Regulation
GNI	gross national income
HR/VP	High Representative of the Union for Foreign Affairs and Security Policy
I-DESI	International Digital Economy and Society Index
IBC	Issue-Based Coalition
IcSP	Instrument contributing to Stability and Peace
ILO	International Labour Organization
IMF	International Monetary Fund
IPCC	Intergovernmental Panel on Climate Change
JCPOA	Joint Comprehensive Plan of Action
KAS	Konrad Adenauer Stiftung
LNG	liquefied natural gas
LRAs	local and regional authorities
MENA region	Middle East and North Africa region
METI	Mainstreaming Employment into Trade and Investment

MFA	macro-financial assistance
MFF	Multiannual Financial Framework
MIP	Regional Multiannual Indicative Programme
MS	Member State
NDICI/ NDICI – Global Europe	Neighbourhood, Development and International Cooperation Instrument – Global Europe
p.p.	percentage points
RCPs	Regional Consultative Processes
RDPP	European Regional Development and Protection Programme
SDGs	sustainable development goals
SIENA	Secure Information Exchange Network Application
SIPRI	Stockholm International Peace Research Institute
SLR	sea-level rise
SMEs	small and medium enterprises
SN	Southern Neighbourhood
STRAT.2	EEAS Strategic Communication Division and its Task Forces
UAE	United Arab Emirates
UfM	Union for the Mediterranean
UN	United Nations
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNIMED	Mediterranean Universities Union
USD	United States Dollar
VET	Vocational Education and Training
WHO	World Health Organization
y/y	year over year

## Executive summary (EN)

The Southern Neighbourhood (SN) of the European Union (EU) remains in what appears to be a state of a permanent turmoil. In addition to the old and still unresolved Israeli-Palestinian conflict, and the conflicts that emerged in the wake of the Arab Uprisings (Libya and Syria), tensions between regional rivals in the Eastern Mediterranean and renewed bilateral tensions in the Western Mediterranean have made the security situation more fluid and uncertain amid the growing arms race in the region. Both the pandemic and the war in Ukraine have also exacerbated the socio-economic vulnerabilities of SN countries, amplified by the effects of climate change, particularly acute in this region. Overall, the situation in the region in terms of governance, rule of law and human rights is no better than the pre-2011 situation in many regards. Levels of unemployment, inequality and corruption may offer fertile ground for renewed popular mobilisations.

While the pandemic had opened a window of opportunity to relaunch cooperation between both sides of the Mediterranean, reactions to the Russian aggression on Ukraine seem to confirm a growing rift in Euro-Mediterranean relations, despite the high degree of interdependence between the two (e.g., trade, energy and diasporas). Indeed, it appears clear that the visions and objectives of the 1995 Barcelona Declaration have yet to materialise and the Euro-Mediterranean partnership itself is ailing. SN countries are increasingly assertive, routinely denouncing EU interference or asymmetrical relations, questioning the benefits of Euro-Mediterranean cooperation and diversifying their alliances. The EU struggles to acknowledge that domestic developments including the rise of populism in some of its member states (MS), its overwhelming prioritisation of migration and its difficulties deviating from the rigid policies and frameworks under the European Neighbourhood Policy (ENP) have had an impact on how it is perceived by its partners and, ultimately, on the Euro-Mediterranean partnership as a whole. The modest track record of the EU in the region in terms of conflict prevention and resolution, combined with doubts regarding the outcome of the EU's efforts to accompany democratic transitions in recent years, in particular in Tunisia, have further instilled a mood of introspection and fatigue when it comes to the EU's approach in the region.

Against this background, new approaches and efforts to 'swim against the tide' are needed. In this sense, the February 2021 Joint Communication on a 'Renewed partnership with the Southern Neighbourhood: a new Agenda for the Mediterranean' (henceforth: the Joint Communication), released in February 2021 and endorsed by April 2021 Council conclusions, was a welcome and overall well-received initiative. The Joint Communication was an attempt to bring new blood to the relationship, to rebuild ties around issues of common interest and to use a slightly different approach to achieve it. The Joint Communication indeed outlines an Economic and Investment Plan (EIP), articulated around flagship initiatives to be partly financed under the European Fund for Sustainable Development Plus (EFSD+). Thereby, it shows an increased reliance on the use of financial instruments and in particular on guarantees to achieve further leveraging effects.

In terms of policy focus, the EU has attempted to generate a new dynamic by placing two of its own political priorities, the digital and green transitions, at its core. First, supporting the digital transition of its SN is not conceived as an end in itself but rather as an instrument serving two other over-arching EU objectives: promoting inclusive socio-economic development (e.g., supporting digitalisation, including digital entrepreneurship and digital learning, may lead to job creation, in particular for youth and women) and promoting its agenda of connectivity and interconnectivity (in line with the Global Gateway rationale). Second, the green partnership between the EU and its SN is certainly the most promising area of cooperation. Many flagship projects of the EIP relate to this. Here again, the EU's support to the green transition of its partners corresponds to multiple EU objectives and interests in the region, ranging from fostering inclusive socio-economic development to fighting climate change and possibly securing new sources of renewable energy supply in the medium and long term. While doing so, the EU will need to



acknowledge that due to other challenges or interests, the green transition may not be the top priority of all its partners.

As mentioned above, the federating objective of the Joint Communication is to support inclusive socio-economic development. With this Joint Communication, the EU's approach towards the region pays stronger attention to the social dimension than previously. The EU wants to help its partners to deal with the social effects of the pandemic and to support them in seizing the opportunities deriving from it, i.e., reforming social protection schemes, addressing the issue of large informal sectors, making public services more efficient and inclusive, and meeting the needs of youth, women and vulnerable groups.

However, the question remains whether the Joint Communication is enough to address the magnitude of the challenges in Euro-Mediterranean relations and whether it will be enough to revive an ENP that remains fundamentally unchanged. The Joint Communication neither dramatically breaks with the ENP framework, in terms of its methodology and key principles, nor does it offer tangible responses to paradigms that have been very relevant in EU discourses in recent years. The Joint Communication does not offer concrete ideas on how to activate triangular cooperation (involving for example Sub-Saharan African countries of Gulf countries); it is also not very explicit about how it could support sub-regional integration. Along the same line, the Joint Communication does not offer a way out for the stalling pillars of the ENP, such as the Deep and Comprehensive Trade Agreement negotiations or the visa facilitation/readmission agreement double track approach (from which the EU has not deviated until now, despite consistent resistance from the SN). The EU should explore, together with its partners, how to be more creative and how to depart from the beaten path, while putting on the table attractive frameworks that would convince SN countries to engage with the EU as a whole rather than rely only on bilateral relations (e.g., law enforcement cooperation, readmission).

More than a year after its adoption, and ahead of a possible stock-taking exercise at the Council in Spring 2022, a number of question marks remain in relation to the implementation of the New Agenda. The fate of the EIP has been strongly dependent on the larger programming exercise of the Neighbourhood, Development and International Cooperation Instrument (NDICI), which has been delayed. There are doubts regarding the announced investment amounts as well as how leveraging additional funding will work in practice. There are also questions surrounding the implementation of the principle of conditionality under the EFSD+ and, more generally, concerns that only some of the EU's SN countries will be in a position to benefit from the investment schemes foreseen by the EU.

Last, a truly comprehensive and strategic framework to guide the EU's relations with its SN is still missing. The future of the strategic autonomy of the EU also lies in the future of its relations with the SN. For now, and despite its efforts, the EU is not the decisive 'security provider' or a 'trusted partner (...) uniquely placed to bring together conflicting parties', and called by 'many southern partners (...) for increased engagement' that the Joint Communication describes. The peace and security component of the Joint Communication is the 'weak link' of the Joint Communication. It enumerates the different initiatives of the EU; however, it does not offer innovative proposals in this area.

## Executive summary (FR)

Le voisinage sud de l'Union européenne traverse à nouveau une période d'instabilité. Au conflit larvé israélo-palestinien, et à ceux qui sont apparus dans le sillon des « printemps arabes » (Libye et Syrie), se sont ajoutées des rivalités entre puissances régionales en Méditerranée orientale et des tensions bilatérales accrues en Méditerranée occidentale, sur fond de course aux armements. Le contexte sécuritaire semble en effet plus fluide et incertain que jamais.

La pandémie et la guerre en Ukraine ont coup sur coup exacerbé des fragilités socio-économiques préexistantes, déjà accentuées par les effets du changement climatique qui ont commencé à se manifester dans cette région, particulièrement exposée. A de nombreux égards, la situation en termes de gouvernance, d'état de droit et de droits humains n'est pas meilleure que la situation antérieure à 2011. Les niveaux de chômage, d'inégalités et de corruption offrent un terreau fertile à de nouvelles mobilisations populaires.

Si la pandémie a ouvert des opportunités pour relancer la coopération euro-méditerranéenne, les réactions à la guerre en Ukraine semblent confirmer un fossé grandissant entre les deux rives de la Méditerranée, malgré les interdépendances objectives qui unissent les deux rives (commerce, énergie, diasporas). Il apparaît de façon très nette que les visions et les objectifs qui ont présidé à la déclaration de Barcelone de 1995 ne se sont pas matérialisés et que le partenariat euro-méditerranéen s'essouffle. Les pays sud-méditerranéens sont devenus plus assertifs, dénoncent régulièrement ce qu'ils perçoivent comme de l'ingérence de la part de l'Union Européenne (UE) dans leurs affaires intérieures ou une relation asymétrique, remettent parfois en cause les bénéfices de la coopération euro-méditerranéenne et tendent à diversifier leurs partenariats. L'UE, quant à elle, peine à admettre que ce qui se passe à l'intérieur de ses frontières, et notamment la montée du populisme dans certains Etats membres, la prégnance des questions migratoires dans l'agenda européen, et sa difficulté à dévier de formats perçus trop souvent comme rigides dans le cadre de la politique européenne de voisinage (PEV), a un impact sur la façon dont ses partenaires la perçoivent et sur le partenariat euro-méditerranéen dans son ensemble. Le bilan modeste de l'UE dans la région en termes de prévention et de résolution de conflits, ainsi que les questions qui se posent sur le résultat des efforts déployés en Tunisie pendant la dernière décennie, ont plongé l'UE dans une période de doutes s'agissant de sa relation à son voisinage méridional.

Dans ce contexte, de nouvelles approches sont nécessaires. A ce titre, la communication conjointe qui propose un nouvel agenda pour la Méditerranée, publiée en février 2021 et approuvée par le Conseil dans des conclusions d'avril 2021, a été saluée et accueillie favorablement. La communication conjointe tente d'injecter du sang neuf dans la relation, de reconstruire les ponts autour de thématiques d'intérêt partagé, et de recourir à de nouvelles approches pour y parvenir. Elle ébauche un plan économique et d'investissement qui s'articule autour de programmes phares ayant vocation à être financés pour partie par le nouveau fonds européen pour le développement durable. Elle accentue donc le recours aux instruments financiers, et en particulier au mécanisme de garanties financières censées produire un effet de levier pour générer des investissements supplémentaires.

En termes de priorités politiques, c'est en mettant au cœur de la communication conjointe deux de ses propres priorités politiques, la transition numérique et la transition écologique, que l'UE espère donner un nouveau souffle au partenariat. La première n'est pas vue comme une fin en soi, mais davantage comme un instrument au service de deux objectifs généraux : le développement socio-économique inclusif (le soutien à la transition numérique s'accompagnant en effet d'un soutien à l'entrepreneuriat, à l'éducation, et pouvant donc être porteur de création d'emplois, notamment pour les jeunes et les femmes) et la promotion des interconnexions (conformément à l'agenda « global gateway »). Le partenariat écologique entre l'UE et son voisinage méridional constitue sans doute l'horizon de coopération le plus prometteur. De nombreux programmes phares s'articulent autour de cette problématique. Ici encore, le soutien de l'UE

à la transition écologique de ses partenaires est en partie liée à d'autres objectifs et intérêts de l'UE, dont le soutien au développement inclusif, la lutte contre le changement climatique et la recherche de nouvelles sources d'approvisionnement en énergies durables à moyen et long terme. Ce faisant, l'UE se doit de reconnaître que la transition écologique ne figure pas nécessairement de façon aussi prioritaire dans la liste des préoccupations de ses partenaires, confrontés à d'autres défis et poursuivant parfois d'autres intérêts.

Comme indiqué plus haut, l'objectif fédérateur de la communication conjointe est bien de soutenir un développement socio-économique qui soit réellement inclusif. Avec cette communication conjointe, l'UE semble mettre plus l'accent que précédemment sur les problématiques sociales. L'UE entend aider ses partenaires à affronter les conséquences sociales de la pandémie, à réformer les systèmes de protection sociale, à résoudre le problème structurel de l'économie informelle, à rendre les services publics plus efficaces et inclusifs, et à porter une attention toute particulière aux besoins des jeunes, des femmes et des groupes les plus vulnérables.

Cependant, la question fondamentale qui se pose est de savoir si la communication conjointe est suffisante pour affronter l'ampleur des défis qui se posent dans les relations euro-méditerranéennes, et si cet effort suffira en effet à redynamiser la politique européenne de voisinage. Cette dernière reste fondamentalement inchangée. La communication conjointe ne rompt ni avec sa méthodologie ni avec ses principes généraux. Elle n'apporte pas non plus d'idées novatrices pour opérationnaliser des concepts qui se sont imposés dans les discours européens ces dernières années, et notamment la coopération triangulaire (impliquant soit des pays sub-sahariens soit des pays du Golf). Elle n'est pas non plus très explicite s'agissant des modalités de son soutien à l'intégration sous-régionale. De même, la communication conjointe ne prend pas directement acte du fait que certains piliers de la PEV n'ont pas fonctionné, tels que les accords de libre-échange complets et approfondis ou l'approche consistant à coupler la négociation d'accords de réadmissions avec l'assouplissement du régime des visas (approche à laquelle l'UE et ses Etats membres n'ont en effet pas voulu renoncer jusqu'à présent, malgré les résistances claires de ses partenaires).

L'UE devrait donc élaborer, avec ses partenaires, de nouvelles approches plus créatives, en dehors des sentiers battus. Elle devrait proposer des cadres attractifs, de nature à convaincre ses partenaires d'investir dans leur relation avec l'UE au-delà de leurs relations strictement bilatérales avec les Etats membres (en matière de réadmission et de coopération de police et de sécurité notamment).

Plus d'un an après son adoption, et à la veille d'un possible bilan à mi-parcours du conseil prévu pour le printemps 2022, un certain nombre de questions restent en suspens s'agissant de la mise en œuvre du nouvel agenda. Le sort du plan économique et d'investissement reste lié à celui de la programmation du nouvel instrument de voisinage, de coopération au développement et de coopération internationale (NDICI), qui a elle-même été retardée. Des doutes existent aussi quant aux montants d'investissements annoncés, et quant à la façon dont vont fonctionner les effets de leviers qu'on leur prête. Il y a aussi des points d'interrogation autour de la mise en œuvre du principe de conditionnalité dans le cadre du nouveau fonds européen pour le développement durable, et autour de la capacité de certains des partenaires de se positionner pour bénéficier des mécanismes d'investissement prévus par l'UE.

Un cadre réellement stratégique et global pour guider les relations de l'UE avec ses voisins méridionaux fait encore défaut. L'avenir du débat sur l'autonomie stratégique de l'UE passe aussi par ses relations avec son voisinage sud. Pour l'heure, et malgré ses efforts, l'UE n'est pas le « pourvoyeur de sécurité » ou le « partenaire de confiance (...) idéalement positionné pour rapprocher des parties en conflit », comme la communication conjointe le prétend. Le chapitre paix et sécurité est le parent pauvre de communication conjointe. Il se contente essentiellement d'énumérer un certain nombre d'initiatives existantes, sans apporter de propositions innovantes en la matière.

## 1. A region in turmoil, a challenged relationship

### 1.1. The state of Euro-Mediterranean relations

#### 1.1.1. The Euromed paradigm in the doldrums

Twenty-seven years after the inauguration of the Euro-Mediterranean partnership, it is not too adventurous to argue that the visions and objectives outlined in the 1995 Barcelona Declaration (Euro-Mediterranean Conference) — prosperity, stability and peace — have yet to materialise. The very concept of the Euro-Mediterranean partnership has lost traction. The Euromed brand seems to be largely held at arm's length by the Union for the Mediterranean (UfM) and implemented through a web of regional projects financed by the European Union (EU). Symbolic — though important — innovations such as the recent instauration of a Mediterranean day (Union for the Mediterranean, 2021b) were not sufficiently able to hide the low-profile celebration of the 25<sup>th</sup> anniversary of the Barcelona declaration. Misunderstandings have proliferated between both sides of the Mediterranean, which seem to be less committed to and interested in one another, while so much still binds them in practice. Reactions to the war in Ukraine have further illustrated the growing gap of narratives between both sides of the Mediterranean (see Section 1.3). Certain aspects of the pessimistic scenarios identified in a recent study on Euro-Mediterranean relations have already begun to materialise, including growing suspicions and emerging new conflicts (Amirah-Fernández, H., Descamps, C. and Soler i Lecha, E.) or the possibility of the Mediterranean becoming a 'dividing line' (Ayadi, R. and Sessa, C.). In recent years, suspicions, tensions and diplomatic irritants seem to have prevailed over what unites the two shores of the Mediterranean. As demonstrated below, the EU's Southern Neighbourhood (SN) countries<sup>1</sup> have been increasingly assertive in their bilateral relations with the EU, while the EU has tended to prioritise security and migration concerns under pressure from domestic forces to the detriment of other aspects of the partnership.

Policies and paradigms once presented as promising pillars of Euro-Mediterranean relations have shown their limits. As explained below (see Section 2.4.2), negotiations on the Deep and Comprehensive Free Trade Agreements (DCFTAs) with countries that were considered pioneers of Euro-Mediterranean cooperation have stalled. Similarly, there has been no progress made on the dual visa facilitation/readmission track, to which the EU has wanted to stick to thus far despite the outright refusal of its partners (who are opposed in particular to the third-country nationals' clause — see Section 2.4.1). All in all, both on trade and migration, the rift between a methodology that has proved relatively successful in the Eastern Partnership and stalling relations with the SN has become very apparent. Indeed, DCFTAs with Moldova, Ukraine and Georgia have entered into force, as did visa liberalisation, a taboo in the Euro-Mediterranean context. Furthermore, following the Russian invasion of Ukraine that started on 24 February 2022, all three countries formally applied for EU membership.

On a more symbolic note, attempts to upgrade the bilateral relationships between the EU and some of its partners have proved to be in vain. The quest for new labels and paradigms has yet to materialise, in contrast with similar successful attempts in the past, for example, when the EU and Morocco in 2007 adopted an advanced status (*statut avancé*) for Morocco. Ahead of the 2018 Association Council between Tunisia and the EU, a 'brainstorming exercise' began with successive meetings between senior EU and Tunisian officials with the objective of defining the long-term perspective of the relationship as well as

<sup>1</sup> Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Syria (cooperation under suspension), Palestine (this designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the member states on this issue) and Tunisia.

finding a new label it. This ambition has been merely repeated in successive joint declarations following association councils and has been postponed without any tangible results<sup>2</sup>. In a more discreet setting the following year, in June 2019, Morocco hosted in Skhirat a seminar entitled 'What perspectives for the Morocco-EU partnership by 2030?' with the objective of revamping the first EU-Morocco Association Council on 27 June 2019 (after a four-year interruption since December 2015) and the Association Agreement of 2000. However, the announced reflection on a new framework for relations is yet to materialise, despite the language included in the Joint declaration<sup>3</sup>.

The UfM, and in particular its secretariat<sup>4</sup> as the institutional embodiment of the Euro-Mediterranean partnership, continues to face limitations. As an indirect acknowledgement of this, the UfM is increasingly communicating on its convening power and policy dialogue-facilitating role. There are interesting and promising trends ongoing indeed in terms of policy dialogue, with UfM policy frameworks being used to define strong common stances or win-win strategies among the 42 countries, which will be described in other parts of this report and that are worth building upon (see Section 2.1.2). However, the added value of 'labelling' projects, which remains one of the core mandates of the UfM, is often questioned by the different stakeholders involved in the projects (interview no. 48), who also note that there is limited project management expertise within the Secretariat of the UfM. In many cases, labelled projects, which are funded by external donors and coordinated by another organisation, do not 'owe' anything to the UfM except occasional updates/reporting on progress. This makes it difficult for the UfM to monitor project activities and thus 'exploit' them in the best way possible. Hence, the projects are oftentimes disconnected from the UfM's policy processes. Last, large-scale flagship projects that used to be presented as a window of opportunity for the UfM have ceased to be branded as such, as the implementation of some of them, such as the desalination plant for Gaza (the first project to be endorsed by the UfM), have faced numerous obstacles and been delayed.

Against this backdrop, expectations are likely too high and the UfM is often singled out and blamed for the shortcomings of Euro-Mediterranean relations, which extend far beyond this institution. The Secretariat of the UfM is only one piece of the puzzle, with limited resources and a difficult mandate to implement. It might not be accurate, for instance, to blame the Secretariat alone for the slow implementation of the UfM 2017 roadmap (Union for the Mediterranean, 2017), which sets ambitious objectives, the completion of which depends primarily on its member states (interview no. 9). Despite its limitations, the UfM remains a unique intergovernmental organisation that provides an opportunity to country representatives to enhance regional dialogue and cooperation, thus playing a central role in the Euro-Mediterranean Partnership.

As much as it does not help to place the blame on only one institution, it would also be ill-advised to blame only one particular group of countries for the current situation. What is needed though, is an analysis of how SN countries on the one hand and the EU and its member states (MS) on the other engage in Euro-Mediterranean relations.

<sup>2</sup> 'Both partners aim to continue strengthening their relations beyond 2020 and have agreed to reflect further on the future vision for the partnership before the next meeting of the Association Council in 2019.' (Council of the European Union, 2018). 'We reiterated our desire to continue and intensify our joint discussion on the future of EU-Tunisia relations after 2020, so as to explore ways of deepening our partnership and give practical expression to the unique ties that bind us.' (Council of the European Union, 2019b).

<sup>3</sup> 'In line with this objective, the European Union and Morocco will work to define a new framework for relations, one that is comprehensive and resilient.' (Council of the European Union, 2019a).

<sup>4</sup> The operational budget of the UfM Secretariat is financed up to 50 % by the EC, with the remaining funds coming from UfM member states.



### 1.1.2. A divided, less interested and more assertive Southern Neighbourhood

The way in which SN countries engage in the Euro-Mediterranean partnership has changed over time. For the EU, it is very important to understand how and why this has happened. It is fundamental that the EU understands how it is seen and perceived by SN countries. This is arguably insufficiently factored into the EU's policymaking. While some theories of international relations stress how domestic constituencies shape foreign policies, it is also true that the way a foreign policy player is perceived by third countries determines to a large extent the effectiveness of this foreign policy. In other words, 'what counts is how third countries view Europe' and 'for many, their attitudes are certainly coloured by the experience of gunboat diplomacy, economic and cultural imperialism, and what many describe as modern-day complacency and arrogance.' (Cameron, F. and Islam, Sh.). Domestic developments in the EU have a direct impact on how the EU is perceived in the region (interview no. 35). Anti-Muslim sentiment in the EU, double standards and the treatment of refugees in camps on EU soil are issues that the EU staff managing communications and operations in the region are regularly asked about by their local media counterparts. Furthermore, the SN officials participating in the human rights dialogues are increasingly developing a more pro-active approach in these dialogues, raising themselves concerns about human rights violations in the EU. Among other techniques, misinformation and disinformation activities (see Section 1.2.2 below) may exacerbate and amplify pre-existing perceptions, contributing thereby to degrading the EU and its policies<sup>5</sup>. On an official level, SN countries regularly and increasingly denounce European interference in their domestic affairs<sup>6</sup> (see more on the related issue of conditionality in Section 2.1.3). Along the same lines, the Euro-Mediterranean partnership is often perceived as unbalanced by the SN countries who routinely argue that their interests are not sufficiently represented (e.g., concerning trade exchange, see Section 2.4.2). However, the EU cannot take the blame for acting as an integrated bloc, and lack of integration among the SN countries to a large extent does contribute to this asymmetry. The EU itself has consistently tried to encourage regional integration among its SN partners<sup>7</sup>. However, there has been no progress on this front and regional integration is lagging<sup>8</sup>.

Two trends related to the engagement of the SN countries in Euro-Mediterranean affairs seem to have intensified. First, some of these countries have become increasingly assertive in their relationships with the EU. Bilateral diplomatic irritants between the EU or some of the MS and SN countries have polluted Euro-Mediterranean relations in recent years and have shown the fragility of the whole Euro-Mediterranean architecture. Tensions between Morocco and some of its European partners, for instance, have partly driven this traditionally very keen country away from its Euro-Mediterranean orientations and instilled a sense of suspicion between both shores of the Mediterranean, which is not conducive to cooperation. For example, in 2021, tensions ran high between Morocco on the one hand and Spain and Germany on the other in relation to Western Sahara. Tensions increased in particular in May 2021 — with Spain, after the

<sup>5</sup> As one of the recent (summer 2020) polls conducted for the EU showed, 45 % of persons in Maghreb and 47 % in the Mashrek on average have a positive image of the EU — a result fairly in line with an average view of the EU itself (positive for 48 % of respondents) according to Spring 2021 edition of the Eurobarometer (European Parliament, 2021; EU Neighbours South, 2020b). At the same time, according to PEW Research Global Attitudes Survey (Pew Research Center), in 2019, a favourable view of the EU was held by 51 % of Israelis, 61 % of the Lebanese, and 50 % of Tunisians (in the 2014 edition of the survey the corresponding numbers stood at 50 %, 50 % and 72 %, respectively).

<sup>6</sup> See for instance the statement issued by Tunisian President Saïed in the wake of the visit of the High Representative/Vice President of the European Commission, Josep Borrell, in September 2021 refusing EU's conditionality, and expressing their desire to move away from a donor-recipient logic (interview no. 29; Jelassi, M. K.)

<sup>7</sup> See for reference 2012 Joint Communication (European Commission, 2012).

<sup>8</sup> See, e.g., OECD, 2021.

leader of the Polisario Front was treated in a Spanish hospital, and with Germany, after Berlin stressed that its position concerning the Western Sahara remained unchanged. These recent developments add to tensions between Morocco and the EU as a whole. The reactions of Morocco against the EU following decisions by the EU's Court of Justice have been perceived as excessively aggressive on the EU side, as illustrated by a statement released by the Moroccan Ministry of Agriculture in February 2017, whereby Moroccan authorities warn in unusually non-diplomatic language of the migration-related and political consequences of such positions (Kingdom of Morocco, 2017).

The second trend is a declining interest among some SN countries in Euro-Mediterranean mechanisms and a reorientation of their foreign policy priorities towards other regions. While this balancing act is legitimate, the problem occurs when this happens too abruptly and in a way that can jeopardise the strong and objective bonds between both sides of the Mediterranean<sup>9</sup>. The EU may also read the reluctance of some SN countries to send representatives to Euro-Mediterranean institutions<sup>10</sup> or to meetings as a sign of a lack of interest in cooperation. Some regretted for instance that certain countries cancelled their participation in the 16<sup>th</sup> plenary session of the Parliamentary Assembly of the UfM in Brussels on 3-4 December 2021 at the last minute and did not participate online (interview no. 45). EU institutions, EU capitals and host country media outlets (González, M.) also took note of the absence of all Maghreb Ministers in the UfM Foreign Ministers meeting at the end of November 2021, who were attending instead a meeting with Chinese counterparts (interview no. 27). This trend makes some informed observers think that the language developed in policy documents portraying the EU as the main partner of these countries no longer corresponds to how these countries perceive the EU. 'The EU has ceased to be a moral and material reference for those countries; we should take note and wake-up' (interview no. 25). This is also supported by evidence from polls. The results of the 2020 Euromed survey of experts show that a majority of respondents felt that the EU has lost attractiveness in the eyes of governmental authorities in SN countries since 2011 (European Institute of the Mediterranean, 2019).

However, there are contradictions in the positions of certain SN countries *vis-à-vis* the EU. While some express the wish to move away from donor-recipient-based relationships, these countries remain overall attached to the annual financial allocations under EU programming<sup>11</sup> and stand firmly against the decrease of such envelopes. Similarly, the same countries which are, with varying degrees of success, turning to other players in the region or beyond, also regularly claim that the ENP is not adapted to their ambitions and call for a tailor-made model that would bring them closer to the EU, allowing them to further benefit from its programmes — at the same time not always making a sufficient commitment to contribute to shaping these policies.

<sup>9</sup> See statement mentioned in the previous footnote.

<sup>10</sup> Some Southern Mediterranean countries have chosen not to appoint a Deputy Secretary General in the Secretariat of the Union of the Mediterranean although a seat was reserved for them.

<sup>11</sup> Since the launch of the European Neighbourhood and Partnership Instrument (ENPI) in 2007, the has EU allocated EUR 20.5 billion for cooperation with the SN through the Neighbourhood financial instruments (see, e.g., [https://ec.europa.eu/neighbourhood-enlargement/european-neighbourhood-policy/southern-neighbourhood\\_en](https://ec.europa.eu/neighbourhood-enlargement/european-neighbourhood-policy/southern-neighbourhood_en)) – on top of funds delivered by individual EU member states. While making direct comparison with other donors is challenging, it might be noted that approximately USD 6-7 billion has been allocated annually in foreign assistance (non-humanitarian bilateral aid) to the SN countries by the United States between 2014-2021 (see, e.g., <https://crsreports.congress.gov/product/details?prodcode=R46344>).

### 1.1.3. The EU dilemmas

Less than 10 years after its creation in 2003, European Neighbourhood Policy (ENP) was challenged by major upheavals in the Southern Mediterranean. In reaction to what has been called the Arab Uprisings, the Commission and the High Representative of the European Union for Foreign Affairs and Security Policy (HR/VP) published two Joint Communications on 'A new response to a changing Neighbourhood' (European Commission, 2011a) and 'A partnership for democracy and shared prosperity with the Southern Mediterranean' (European Commission, 2011b)<sup>12</sup>. The European Parliament's Committee on Foreign Affairs (AFET) welcomed this ENP review in a report released on 24 November 2011 (European Parliament, 2011), where it encouraged the European Commission to develop even further benchmarks underpinning the transformative approach. Four years later, the review of the ENP introduced by the Joint Communication (European Commission, 2015b) published on 18 November 2015<sup>13</sup> was carrying the ENP away from the transformative paradigm and redirecting its focus to the need to stabilise a neighbourhood weakened by conflicts and the resulting flows of refugees and displaced persons. The introduction of 'partnership priorities' replacing action plans for most of the countries and the phasing out of 'progress reports' also revealed EU intentions to be seen as less judgemental and sermonising. In its report (European Parliament, 2015) published ahead of the ENP review in 2015, AFET stressed that 'the revised ENP should be able to provide a quick, flexible and adequate response to the situation on the ground' and called for 'a strong security component in the ENP, with adequate policy tools which have regrettably been missing to date'.

Six years later, while the HR/VP and the European Commission were about to introduce a new document, focusing this time specifically on its SN<sup>14</sup>, it appeared that the EU had neither managed to transform its SN and incentivise reforms (which the AFET Committee had called for in its 2011 report) nor reinforce its security clout in the region (as the AFET Committee had called for in 2015). In Tunisia, the EU has spent significant political and financial capital since 2011. Despite a favourable alignment of stars, with no major divisions within MS on the line to take *vis-à-vis* this country and no major involvement of world or regional players, EU support was not decisive enough to prevent the situation in Tunisia from worsening in many regards. Some argue that the EU should have invested even more in the Tunisian transition, comparing the EU effort with what had been done in Central and Eastern European countries in 1990<sup>15</sup>. As one interviewee commented, 'You do not change the destiny of a country with a few hundreds of millions per year' (interview 6; supported by interview no. 7). Moreover, the cases of Syria and Libya show that the EU has not been able to impose itself as a decisive and united security provider. In these cases, the EU has not managed to fill the gap of the relative disengagement of the United States (US) from the region.

This is not to say that the EU has not had an important role in the region over the last decade. It is true that the critical situation of the region overall makes it probably easier to look at the empty half of the glass. In Syria, the EU and its MS have become the leaders of humanitarian and development aid (mobilising over EUR 24.9 billion in assistance from the EU and MS since the start of the conflict in 2011)<sup>16</sup>, convening pledging conferences each year in order to keep Syria and the suffering of millions of people on the agenda and creating a dedicated fund directly benefiting Syrian refugees and host populations in neighbouring

<sup>12</sup> The Council conclusions on ENP of 20 June 2011 were fully endorsed by the European Council in Conclusions of 23-24 June 2011 [https://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/ec/123075.pdf](https://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/123075.pdf)

<sup>13</sup> This came a year after the entry into force of the ENI instrument 2014-2020, which replaced the ENPI 2007-2013 and introduced, among other principles, further details regarding the incentive-based approach and a better articulation between programming and EU policies.

<sup>14</sup> This Joint Communication is part of a series of similar communications, mainly driven by DG NEAR, on the Eastern Partnership (Joint Communication, 18 March 2020) and on the Western Balkans (Communication from the Commission, 20 October 2020).

<sup>15</sup> Even though, as some researchers have pointed out, making such comparisons is of limited value. See, e.g., Dąbrowski, M., 2016.

<sup>16</sup> European Commission, 2021e.



countries. Although the situation in Tunisia has deteriorated in many regards, it is also legitimate to ask what would have happened in this country without the significant political capital the EU has invested since the revolution.

However, the argument holds that the EU has neither managed to help its partners reform for the benefit of their people nor stabilise the region. How can the relative failure of the EU in these different scenarios be explained? There are four major causes which can be applied in different cases:

- Discussions on the divisions between MS is now a hallmark of research on EU Foreign Policy. Results of the Euromed survey (European Institute of the Mediterranean, 2021) published in 2021 show that nearly one-half of respondents identified 'EU member states' efforts to unify their positions and speak with one voice' as the most important condition to meet if the EU wants to contribute more effectively to solving conflicts in its SN. These divisions originate either in 'conflicting assessments of a problem' (Syria, Yemen and the Israeli-Palestinian peace process) or in 'cases of genuinely conflicting national interests' (Schuette, L.). Libya seems to be a good example of the latter, where conflicting French and Italian positions can be partly explained by different energy and commercial interests. MS are still competing to sell military equipment to SN countries, which acts to the detriment of a strong, united position for the EU and can be exploited by the EU's partners. Another example is the visit of the Hungarian Foreign Minister to Tunisia in December 2021, about which the EU Delegation in Tunis was informed through the local media and where the Hungarian position diverged from the official EU line (interview no. 21). The authors of the abovementioned policy brief rightly stress that 'beneath the surface of many divisions lies a profound conflict over the very nature of EU foreign policy'.
- The change in dynamics in the political scene of some EU MS, where mainstream parties have been increasingly challenged by populist ones, has also had a serious effect on the EU's agenda setting in the Mediterranean. It has obliged mainstream parties to securitise their discourse and imposed migration on the top of the EU agenda *vis-à-vis* the Mediterranean. This, in turn, has been perceived quite badly in SN countries, thereby limiting the potential for cooperation in other areas. This has also been exploited by some SN countries, which have perfectly integrated into their handbooks how to use the migration weapon to blackmail the EU without the risk of bearing serious consequences. The idea of the EU being trodden upon and the need for the EU to assert its power *vis-à-vis* its southern neighbours in a more realist way came up repeatedly in interviews conducted by the authors of this report (interview no. 9 & 16).
- Partly due to domestic developments within EU MS, there has been a trend towards introspection, which has curbed the EU's appetite to engage enthusiastically with its neighbourhood. This diffuse lack of political ambitions certainly has other causes. The EU, still traumatised by the implications of the Libya conflict, where the situation deteriorated after the fall of Ghaddafi, has chosen not to confront Russia on Syria and has not vigorously opposed the Assad regime, which the EU had clearly identified early on as illegitimate.
- The EU's visibility in the region remains limited despite taking steps in the right direction in the field of strategic communications, for example, in regards to the recently created position of EU Regional Media Officer and expanding the mandate of the EEAS (European External Action Service) Strategic Communication Division and its Task Forces (STRAT.2), placed within the Directorate for Strategic Communication and Foresight of the EEAS. During the pandemic, for instance — as mentioned by some of the interviewees (interview no. 42) — the EU's contribution to the COVAX Facility was not sufficiently acknowledged by some of the partners to the scheme. This lack of awareness of the scope of involvement and investment (financial and otherwise) of the EU in the region among the broader

population made it easier for Eurosceptic tendencies to spread and has been detrimental to the strength of the EU's leverage in the region.

## 1.2. A region in flux and its impact on the EU and its interests

### 1.2.1 A more volatile region than 26 years ago

The 1995 Barcelona Declaration was signed on the back of the Oslo Accords. There was some hope that stability would prevail in the region, which, 27 years later, is still characterised by a high degree of volatility and an unstable security architecture.

While the Euro-Mediterranean partners wondered how to celebrate the 25<sup>th</sup> anniversary of the Barcelona Declaration, the situation in Libya remained unstable despite the ceasefire brokered in October 2020 between the opposing factions, which opened the way to political talks backed by the United Nations (UN) and to the planning of elections. Unfortunately, the elections could ultimately not be organised on 24 December 2021 as foreseen. The conflict in Syria was entering its 11<sup>th</sup> year and was no longer the headline news for many newspapers. Signs pointing to the beginning of a sort of normalisation of relations with the Assad regime (including with the visit of United Arab Emirates [UAE] officials to Syria in 2021 or the return of some refugees) cannot hide the reality that the domestic situation of Syria is far from being normalised. The 'war is not over' was one of the main messages coming from the January 2022 Foreign Affairs Council conclusions (Council of the European Union, 2022). About 3 million people continue to live in the Idlib region, outside the control of the Syrian government and highly dependent on the humanitarian assistance flowing through the last crossing under the UN mandate (Bab al-Hawa). The efforts of the UN Special envoy for Syria, Mr Geir O. Pedersen, to bring about a political solution have not yet materialised. Beyond the number of casualties, refugees in the region, and displaced persons, this conflict will leave long lasting scars and trauma that will make the reconstruction of Syria more challenging (for the potential consequences of the Russian invasion of Ukraine for Syria and, more broadly, the entire SN region, see Section 1.3).

In addition to these two conflicts which have flared up in the wake of the Arab Uprisings, the region continues to be handicapped by the 70-year long conflict between the Palestinians and Israelis. Long considered as the 'mother of all conflicts', it seems that this conflict has ceased to be shaping the overall regional security order and has lost ranking in the priority list of many governments around the world. With normalisation processes between Israel and some Arab countries, Israel has managed to decouple the Israeli-Palestinian conflict from its relationship with other Arab countries. A solution to the Israeli-Palestinian conflict does not seem to be a realistic scenario for the upcoming years.

Tensions between regional rivals have also intensified in recent years, both in the Western and in the Eastern Mediterranean. In the Western Mediterranean, Algeria cut its diplomatic relations with Morocco in August 2021 and there are reasons to worry about a possible escalation. In the Eastern Mediterranean, tensions have run quite high between Turkey and other Mediterranean countries. Tensions between Turkey and Egypt, France and the UAE in relation to the situation in Libya have added to the long-standing dispute between Greece and Cyprus on the one hand and Turkey on the other. The risk of escalation also exists in this part of the Mediterranean. As one expert explains (Dalay, G.), the 'crisis is more perilous than previous disputes' because of structural changes (including the vacuum following the perceived US 'retreat' from the region and a stalled EU accession framework) and because of the combination of conflicting energy and geopolitical interests (with the Libyan conflict in particular).

Furthermore, the domestic situation in some countries of the region remains a cause for concern and could lead to further sources of regional instability. The situation in Lebanon is critical, as the country is going

through multiple crises. The country is in a political stalemate. The population has lost complete trust in its political representation, while sectarian divides have amplified and been manipulated. The economic situation is unsustainable (for implications of the Russian invasion of Ukraine in regard to the socio-economic situation in the region, including for food security, see Section 1.3). Inflation is at a record high, and the country defaulted on its debt for the first time in March 2020. The energy supply is under stress. The youth is losing hope and abandoning Lebanon in critical numbers. The conditions for soldiers in the Lebanese Armed Forces are very bad and, if left unaddressed, could challenge the very existence of this institution. All these challenges have added to a situation already strained by the presence of millions of Syrian refugees on Lebanese soil.

Two other phenomena can be added to complete this picture. The first one is the risk of the deteriorating security situation of the Sub-Saharan neighbours spilling over to Maghreb countries. The rise of terrorism in Mali, for example, is a serious threat for Algeria. The second is the unprecedented arms race in the region. Data from the Stockholm International Peace Research Institute (SIPRI) show that 'the biggest growth in arms imports was seen in the Middle East including the Gulf region. Middle Eastern states imported 25 % more major arms in 2016-2020 than they did in 2011-2015' (SIPRI). The growth of Egypt's arms imports for example between these two periods was 136 %. Comparing convergent data from the World Bank and SIPRI, the increase of the share of military expenditures as a percentage of the gross domestic product (GDP) between 2010 and 2020 is particularly striking for Maghreb countries, with an increase of 3.2 percentage points (p.p.) for Algeria (from 3.5 % to 6.7 %), 0.9 p.p. for Morocco (from 3.4 % to 4.3 %) and 1.8 p.p. for Tunisia (from 1.1 % to 2.9 %). According to Moroccan sources from October 2021, fiscal plans for Morocco and Algeria showed allocations of 'USD 12.8 billion and USD 9.7 billion, respectively, to military spending' (Rahhou, J.). According to similar data from the World Bank and SIPRI, military expenditures in Algeria represented 6.7 % of its GDP in 2020 and 4.3 % in Morocco (SIPRI; World Bank, 2021h).

### 1.2.2 Geopolitical trends and megatrends

The current United States administration has sustained the trend of military withdrawal from the MENA region inherited from previous administrations. US forces were deployed to Syria in 2014-15 to provide material support to local Arab and Kurdish fighters against ISIS. Under the umbrella of the Global Coalition against Daesh, the EU as a block, as well as member states individually, participated in the operation. The EU has played a role in the Working Groups on foreign terrorist fighters (FTF), stabilisation, strategic communication and terrorism financing and co-chairs the global Counter Terrorism forum devoted to capacity building in Eastern Africa. At the moment, the US has 900 troops in Syria's northeast and despite the rumours of withdrawal after the Afghanistan one, the still fragile situation in North East Syria coupled with the burden placed on Syrian Democratic Forces (SDF) to control the territory, counter any ISIS comeback and controlling detention camps and prisons where ISIS combatants are held, makes this scenario less feasible. In fact, the fragile situation that Kurdish forces might encounter facing Turkey after a US withdrawal makes it a more complicated move, taking also into account the risk of losing control of captured ISIS combatants and FTF. Nonetheless, this engagement differs substantially from previous US engagements in the region, where the US and its associated partners held control over the country and supervised the regime-change process. In the Syrian/Iraq scenarios at the moment, the agenda is more focused on security, counterterrorism and controlling the potential threat from ISIS and other jihadi-related groups (in Iraq, the number of US troops diminished from 115 000 in 2009 [Wechsler, W. F.] to 2 500 in 2020 [Garamone, J.]). Such protracted presence demonstrates that despite the diminished territorial capacity of ISIS after the Coalition operations, the group still presents a threat, more directly to the region itself but potentially extensible to the EU. ISIS propaganda and recruitment has been restricted considerably but still circulate and capitalises the grievances – from foreign policy decisions, conflicts to issues such as exclusion

and marginalisation perceptions – to reach out to new recruits. Besides, the striking power at the local level was demonstrated in the end of January attack to Hasaka prison where ISIS attempted to liberate its affiliated inmates.

Overall, then, although the US presence remains important in relative terms and although the United States would likely act as an ultimate firefighter should its interests in the region be threatened, a 'retreat' has been happening and it has left a certain vacuum in the region and this has led to at least two geopolitical phenomena. First, some countries with a historical presence or new actors in the region driven by geo-economic interests have used the void left by the United States to increase their presence in the region. Twenty years ago, it would have been difficult to predict that countries such as China or Russia would manage to impose such a presence in the region (interview no.25). The fall of Ghaddafi and the resulting political chaos have been used as a standing argument by the Russians to justify their position in the Syrian conflict and to denounce Western interference in the region. After imposing its presence, Russia has used Syria as a springboard to other theatres in the region. In a well-documented piece on the role of the Wagner Group in Libya, one expert explains how the Group was born and argues that the private military company is 'the most decisive player in the military strategy of the Libyan national army' (Kharief, A.). In turn, the Chinese influence in the region has relied on a very different strategy, as it is implemented through trade and economic instruments. The MENA region is indeed a pivotal segment of China's Belt and Road Initiative, albeit admittedly some countries like Israel or Egypt are more on the radar of Beijing than the others. While as of 2020, the EU remained the main trading partner for all countries in SN save for Palestine, for which most trade exchange in goods happens with Israel, China has a strong economic presence in the region, securing the spot of second largest partner for Egypt, Algeria, Morocco, Tunisia and Syria, third largest in Israel and Libya, fourth largest in Jordan and Palestine and the sixth largest in Lebanon (see Chapter 2.4.2 for detailed trade statistics). From the point of view of the SN countries, China is perceived as a source of investment coming without the Western-style conditionality, even as the strings attached to Chinese money are becoming increasingly visible. Beyond economics, China is seen by some SN governments as proof that there is an alternative to the liberal democracy governance model promoted by the EU and other Western countries (Sidło, K.W. Ed., 2020). At the same time, despite growing investment, China remains reluctant to become a security provider in the SN and its military engagement in the region is very limited.

The second geopolitical phenomenon deriving from the United States retreat has been an increasingly complex web of security alliances building in the region. Conflicts in Syria, Libya and Yemen have become regional and proxy wars with alliances changing from one conflict to the other. In some cases, the common hostility to one country may bring opponents in another crisis together. Some coalitions have become rather stable though and are structured around shared interest going beyond a single conflict (Soler i Lecha, E. S., 2017). In the Eastern Mediterranean for instance, a group of countries including the UAE, Egypt and France have consolidated their alliance and opposition to Turkey, ranging from gas discoveries in the Eastern Mediterranean basin to the Libya conflict. However, the recent visit of the President of Israel in Ankara (the first visit of an Israeli leader since 2008) may contribute to alleviate the feeling of isolation of Turkey in the region, which is key in order to defuse tensions in the region, according to a study submitted to AFET in February 2022 (Toygür et al.). Lebanon has also been caught between proxy dynamics opposing Iran and Gulf countries.

Next to the 'retreat' of the United States and its consequences, another game changer in the region is the Abraham Accords and the ensuing process of normalisation between Israel and other Arab states. The Abraham Accords refer to the joint statement signed by the United States, the UAE and Israel in August 2020. The Abraham Accords were followed by agreements of Israel with Sudan, Bahrain and Morocco. The normalisation process constitutes an unprecedented opportunity to put an end to endemic conflicts

between Israel and some Arab countries. In addition to the political and diplomatic dimension, the normalisation process paves the way for more people-to-people contacts at different levels, as demonstrated for instance with the rise of touristic flows between some of these countries (although this trend has slowed down during the pandemic). On the more negative side, the normalisation process has further isolated the Palestinians and has not thus far improved the chances to solve the Israeli-Palestinian conflict. It has not stopped Israel from pursuing its annexation policy. The normalisation process may also have indirect negative effects on the security balance of the region if countries having made security gains as a result of the normalisation of relations with Israel feel empowered to challenge some of their opponents. Renewed tensions between Algeria and Morocco can be understood in this light. At the end of January 2022, Israeli Prime Minister not only announced that a new laser air defence system would be deployed in 2023, but also that Israel would share this technology with its allies in the region (Al-Monitor).

Another trend in the Western Mediterranean is the pivot of Maghreb countries to sub-Saharan Africa. This has been particularly visible in the case of Morocco, as King Mohammed VI has been personally very much involved in making this happen, conducting bilateral visits all over Africa. Sub-Saharan Africa has become the top priority of Moroccan Foreign Policy. In 2017, Morocco re-joined the African Union. Since then, African support to the Moroccan position on Western Sahara has increased. In tune with these diplomatic efforts, Morocco has imposed itself as an important economic operator and investor on the continent and in particular in Western Africa. On the other side of the Mediterranean, the creation of the East Mediterranean Gas Forum in 2020 (which now involves Cyprus, Egypt, France, Greece, Israel, Italy, Jordan and Palestine and to which the EU has permanent observer status) illustrates the cooperation potential that energy discoveries triggered in the region, but also the relative isolation of Turkey in that part of the Mediterranean.

Another fairly recent trend is the growing use of disinformation by various state and non-state agents globally and in the SN region as well. While this is a much more visible issue in the Eastern Partnership countries, misinformation and disinformation campaigns intensified in the SN amid the COVID-19 pandemic and the war in Ukraine as well (see, e.g., Kenney, S. and Bernadaux, C.; Arab News; Whiskeyman, A. and Berger, M.; Wilson Center, 2020). Foreign actors such as Russia and China were for instance seen spreading 'fake news' about the origin of the virus (as well as using propaganda techniques to conduct 'mask diplomacy') (see, e.g., Sidło, K. W., 2020; Whiskeyman, A. and Berger, M.; Jones, M. O.). Beyond pandemic-related disinformation, non-state actors such as Hezbollah and other governments have used social and traditional media to spread false information in order to promote their own agendas.

### 1.2.3 A tense economic situation

As already mentioned above, the Mediterranean has not become the prosperous and integrated economic area that the Barcelona Declaration had called for. Regional integration continues to face many obstacles, duly identified in the regional integration progress reports (OECD, 2021). Data show that economic indicators have deteriorated in the SN since 2010 — between 2000 and 2019 growth in the MENA region (excluding high-income countries) averaged 1.4 % — although the situation is far from homogenous in the region (see Table 1 below). For instance, in 2020, Egypt was the only country in the region (and indeed a member of the minority group of 38 states globally; World Bank, 2021j) that experienced a positive real GDP growth (largely due to the size of its internal market and domestic consumption), while the economies of Libya and Lebanon were collapsing, albeit for quite different reasons.

At the same time, what remains a common theme throughout the region (with the exception of Israel) is that the SN economies are over reliant on rents from oil, remittances, foreign aid and income generated by the tourism sector.



This is a structural and long-term problem that was further exacerbated during the pandemic, when these sources of income were hit hard (apart from remittances, as explained in Box 1; for repercussions of the ongoing Russia-Ukraine war, see Section 1.3 below). The central government debt-to-GDP ratio, generally believed to be one of the key indicators for the sustainability of government finance, reached alarming levels in Lebanon and, to a lesser extent, Egypt, Jordan and Tunisia (see Table 1 below). Indeed, the case of the Lebanese economy — with no political solution in sight — is particularly worrying, to the point that the International Monetary Fund (IMF) is refraining from making any projections as to its macroeconomic performance in the upcoming year. For Algeria, the drop in oil prices resulted in an increase in the budget deficit, but with the price of Brent crude rebounding (especially since the start of the Russian invasion of Ukraine), the forecasts for 2022 are somehow more optimistic. Losses in the values of local currencies (as of 31 December 2011, EUR 1 could buy 1.958 Tunisian dinars, as of 31 December 2021 – 3.296 [Central Bank of Tunisia], while the Lebanese lira lost more than 90 % of its value between January 2019 and December 2021 [Banque du Liban; Böwer) further exacerbate the impact of structural vulnerabilities in the SN economies. Throughout the SN region, economic forecasts will be revised further downward as a spill-over from the war in Ukraine due to rising food prices, another decrease in the number of tourist arrivals, a potential drop in incoming investment due to ‘flight to safety’ among investors and spike in energy prices.

**Table 1 Macroeconomic indicators, Southern Neighbourhood countries**

Country	Real GDP growth (%)			Fiscal balance (% of GDP)			Government gross debt (% of GDP)			CPI** (% change y/y)		
	2020	2021*	2022*	2020	2021*	2022*	2020	2021*	2022*	2020	2021*	2022*
Algeria	-4.9	3.4	1.9	-11.7	-13.4	-10.4	55.6	58.5	63.2	2.4	6.5	7.6
Egypt	3.6	3.3	5.2	-7.0	-7.4	-6.4	89.8	91.4	89.5	5.4	5.8	7.3
Israel	-2.2	7.1	4.1	-10.8	-	-	72.0	73.2	73.2	-0.6	1.4	1.8
Jordan	-1.6	2.0	2.7	-8.9	-7.7	-5.9	88.0	90.9	90.6	0.4	1.6	2.0
Lebanon	-25.0	-	-	-4.1	-	-	150.4	-	-	84.9	-	-
Libya	-59.7	123.2	5.3	-54.5	6.8	12.5	-	-	-	2.8	21.1	8.0
Morocco	-6.3	5.7	3.1	-7.6	-6.5	-5.9	75.4	75.8	76.6	0.6	1.4	1.2
Palestine	-11.5	4.4	6.0	-10.7	-10.5	-9.4	47.2	44.7	39.6	-0.7	1.3	1.7
Tunisia	-8.6	3.0	3.3	-9.8	-8.3	-7.6	89.7	90.2	92.7	5.6	5.7	6.5
Euro Area	-6.3	5.0	4.3	-7.2	-	-	97.5	98.9	96.3	0.3	2.2	1.7

Sources: International Monetary Fund, 2021a and International Monetary Fund, 2021b; OECD, 2022

No data for Syria

\*projections

\*\*CPI – Consumer Price Index International Monetary Fund, 2021a and International Monetary Fund, 2021b; OECD, 2022

No data for Syria

\*projections

\*\*CPI – Consumer Price Index

Inequalities both between and within SN countries have not diminished since the outbreak of the popular uprisings of 2011, and poverty rates (understood as the share of society living below USD 1.9 per day)

increased on average throughout the Arab world by 1.6 p.p., from 4 % up to 5.6 % between 2010 and 2015 (Abu-Ismaïl, K.; OPHI and UNDP). Countries in conflict situations as well as those hosting large numbers of refugees were particularly affected, but the situation has also been aggravated by population growth reaching peak levels in countries like Egypt, where according to the official ‘population clock’ as of 6 February 2022, 102 948 738 persons lived — an increase of 22 % over the past 10 years (World Bank, 2021j; CAPMAS). Crucially, persistently high levels of unemployment among the working-age population, especially among youth, and low labour market participation levels, especially among women, remain a critical problem.

The non-oil producing countries in the region are not well integrated into global value chains (World Bank, 2020b) and mostly observe negative trade balances (Hoogeveen, J. G. and Lopez-Acevedo, G.). Moreover, significant challenges are related to an overblown public sector and a large informal economy<sup>17</sup>. Indeed, the share of informal employment in total employment estimated by the International Labour Organization (ILO) in 2018 ranges from 44.9 % in Jordan up to 79.9 % in Morocco (for countries with available data; International Labour Organization, 2018). Coupled with uncondusive business climates (World Bank, 2021a) and, consequently, low levels of Foreign Direct Investment (FDI) (see more in, e.g., Hoogeveen, J. G. and Lopez-Acevedo, G.) — not to mention the ongoing conflicts in the region — these countries find themselves, despite some progress having been made, less equipped to incorporate the sustainable development goals (SDGs) into their economies than their northern neighbours (Erian, W. et al.; Economic and Social Commission for Western Asia, 2020).

The economic diversification programmes of countries whose economic model is highly dependent on hydrocarbons, such as Algeria and Libya, are lagging. The increase of the price of hydrocarbons as a consequence of the war in Ukraine is likely to obstruct already slow efforts in this direction. Moreover, dependence on revenues from travel and tourism is significant throughout the region, constituting 8 % of GDP in Morocco and Tunisia, through to 9 % in Lebanon and 11-12 % in Egypt (World Bank, 2021h). On top of this, (as of 2019) tourism constitutes over 40 % of total exports in Jordan and Lebanon, while travel services — over 40 % of all commercial service exports in all SN countries except Algeria and Israel (no recent data for Syria and Libya) (World Bank, 2021h). The tourism sector is also a major source of employment — from 2.9 % in Algeria up to 7.6 % in Jordan, according to official data from the formal sector only (World Bank, 2021g).

<sup>17</sup> Defined by the ILO as ‘all economic activities by workers and economic units that are — in law or in practice — not covered or insufficiently covered by formal arrangements’ (International Labour Organization, 2021a).

## 1.2.4 The bleak picture of governance, rule of law and human rights

There are multiple indicators showing that for most of the countries in the MENA region, the situation in terms of governance, rule of law and human rights is not better than the pre-2011 situation, as illustrated for instance by the data compiled every five years by the World Bank for its Governance Index<sup>18</sup>. This index shows that all countries in the region have shown a decrease in respect for the rule of law in 2020 as compared to 2010, and that only Egypt and Tunisia have shown some improvement in terms of government effectiveness. The causes that led to the protests in 2011 have yet to be addressed (Amirah-Fernández, H., Descamps, C. and Soler i Lecha, E.). This includes acute perceptions of inequality, corruption, impunity and human rights violations, which have materialised in a series of protests in Arab world countries that are sometimes referred to as the second wave of the so-called Arab Uprisings. These included the Hirak Rif Movement in 2016 and 2017 in Morocco and the ensuing demonstrations against some leaders of this movement, the 2018 protests in Jordan triggered by a new tax law submitted to the Parliament, the protests in Tunisia the same year across the country, the protests in Algeria in 2019 after Bouteflika announced his candidacy for the presidential elections, and protests in Egypt, Gaza, and most significantly in Lebanon the same year. Wave V of the Arab Barometer (Jamal, A., Robbins, M. and Al-Shami, S.) provided interesting insights concerning youth perceptions and their increasing frustration, coupled with 'little trust in governments, which are widely viewed as being corrupt, leading to a potential crisis of legitimacy in the region'.

One will never stress enough the devastating consequences of the scale of corruption in this region. Corruption continues to hamper inclusive socio-economic development in many countries of the region. The strong perception of corruption also largely explains the sense of mistrust of the people in their representatives. The Corruption Perceptions Index<sup>19</sup> developed by Transparency International shows that countries of the region continued to rank rather badly in absolute and relative terms. In 2021, the average numbers of points of the countries mentioned in Table 2 below was approximately 34.5, and about 40 when excluding Syria and Libya — both average scores below the global average of 43 (0 being highly corrupt and 100 very clean). The table below also shows that the Corruption Perception Index has only marginally improved for countries such as Tunisia (+1 point) and Egypt and Jordan (+2 points) between 2010 and 2021, and has deteriorated not only in Libya (-5 points) and Syria (-12 points) but also in Lebanon (-1 point) and Israel (-2 points).

<sup>18</sup> <https://info.worldbank.org/governance/wgi/>

<sup>19</sup> <https://www.transparency.org/en/cpi/2021>



**Table 2 Evolution of the Corruption Perceptions Index between 2010 and 2021 in SN countries**

	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
Algeria	33	42	45	35	33	34	36	36	36	34	29	29
Egypt	33	33	35	35	32	34	36	37	32	32	29	31
Israel	59	60	60	61	62	64	61	60	61	60	58	61
Jordan	49	49	48	49	48	48	53	49	49	48	45	47
Lebanon	24	24	28	28	28	28	28	27	28	30	25	25
Libya	17	17	18	17	17	14	16	18	15	21	20	22
Morocco	39	40	41	43	40	37	36	39	37	37	34	34
Syria	13	14	13	13	14	13	18	20	17	26	26	25
Tunisia	44	44	43	43	42	41	38	40	41	41	38	43

Source: Compiled by the authors based on data from Transparency International  
 0 means highly corrupt and 100 very clean

According to the Euromed survey mentioned earlier in the report, ‘corruption, insufficient institutional capacity and governance’ are identified by respondents as the major factors hampering the cooperation of these countries with the EU.

Some observers go one step further and argue that ‘the trend towards authoritarianism in the Middle East and North Africa is strong’ (Lynch, J.) and that protest movements have been crushed using ‘extreme violence’. Some of these concerns are echoed in the EU Annual report on Human Rights and Democracy 2020 published in June 2021 (European External Action Service, 2021a), although the report follows a thematic rather than geographic structure and only rarely elaborates on specific countries or regions. When it does, it is predominantly to reference EU support, which then indirectly discloses EU concerns. Concerning media freedom, for instance, the report reads ‘The EU renewed its support to media freedom in the Southern Neighbourhood, where EUR 14 million was awarded to independent media serving the public interest.’<sup>20</sup> The HR/VP, referring to the effect of COVID-19, said in the foreword to the report ‘We witnessed the shrinking of civic space, the flourishing of disinformation and authoritarian trends growing’, without referring to a specific region. Along the same line, the multi-annual regional programming document reads that ‘Since the COVID-19 pandemic began, the condition of democratic governance and human rights has worsened around the world, and more specifically in the Southern Mediterranean region where democracy has always been fragile’ (European Commission, 2021i).

Lately, increasing concerns have been expressed in relation to Tunisia, a country that has been presented for years as a model for its democratic transition, and one of the only countries where the EU has been able to organise a tripartite dialogue on human rights involving both government and civil society. Many human rights organisations (Human Rights Watch) have warned against the situation in Tunisia, and some analysts (Aliriza, F.) have claimed that the human rights situation had deteriorated since July 2021, including in terms of freedom of the media and freedom of movement and fair justice. In a tightly calibrated and negotiated Declaration by the HR/VP on behalf of the EU released on 16 December 2021, the EU showed a certain degree of self-restraint and commended the agenda presented by President Saïed

<sup>20</sup> Page 127.

a few days earlier, while stressing the importance of ‘respect for the democratic acquis, the separation of powers, the rule of law and fundamental rights and freedoms for all Tunisians’.

**BOX 1: The COVID-19 pandemic has revealed and likely intensified a number of existing problems; it now serves as wake-up call to address them**

While we will only be able to fully comprehend the true impact of the ongoing global COVID-19 pandemic on economies and societies with time (when more data is available), what is already clear is that it adversely affected the whole world. As of 17 March 2022, over 6.1 million people across the globe are estimated to have lost their lives as a result of contracting COVID-19. However, the actual global death toll, i.e., the number of excess deaths, while difficult to calculate, is generally believed to be much higher. The Economist (as of 17 March 2022) estimates it at 14-24.4 million (2.3-4 times the official rate; The Economist)<sup>21</sup>. In SN countries<sup>22</sup>, between 3 000 (Syria) and 26 800 (Tunisia) persons officially lost their lives to COVID-19 (data as of 10 February 2022 [World Health Organization, 2022]). The case-fatality ratio (mortality per 100 confirmed cases) varied from between 0.3 % in Israel, 0.5 % in Lebanon and Jordan, and 0.9 % in Palestine, to 1 % in Tunisia, 1.3 % in Libya, 1.4 % in Morocco, 2.6 % in Algeria, 5.2 % in Egypt and 5.8 % in Syria (among EU countries, this varied between 0.6 % in France and 3.3 % in Bulgaria) (Johns Hopkins University).

On the economic front, the COVID-19 pandemic has revealed structural weaknesses in SN countries and has made the situation more critical in a number of areas (slowing down progress towards achieving various SDGs [World Bank, 2021d]) — although it has also underlined the heterogeneity of the region’s economies. In Lebanon, the political and economic crisis and related uncertainty, the first default in modern history on USD 1.2 billion of debt, and a prolonged political stalemate were the main drivers of its economic collapse (named by the World Bank ‘in the top 10, possibly top three, most severe crises episodes globally since the mid-nineteenth century’ [World Bank, 2021i]). Other countries, however, following a decline in GDP in 2020 (see Table 1), seem to be rebounding (in some cases to pre-pandemic levels), even though in Tunisia, the constitutional crisis is stalling its recovery and the situation in Syria remains precarious. Egypt, the only economy in the region that grew in 2020, expanded at faster rate than expected in the fiscal year 2020/2021 (World Bank, 2022).

The already dire problems of high unemployment rates, in particular among youth, and low labour market participation rates, especially among women, were further exacerbated (see Section 2.3 below).

The decreasing number of those in employment and the drop in salaries of those whose working hours were cut as a result of the pandemic will likely translate into rising poverty rates throughout the region<sup>23</sup> — a region which had (as the only one in the world) already experienced increasing levels of extreme poverty (persons living below USD 1.90/day) in the previous decade, from 2.4 % to 7.2 % in 2011-2018 (Lopez-Acevedo, G. and Hoozevee, J.). Indeed, results of a World Bank telephone survey conducted between April and October 2021 in Egypt, Lebanon, Libya, Morocco, Tunisia and Palestine, as well as in Djibouti and Iraq, showed that over one-half of the surveyed households experienced a drop in living standards compared to the pre-pandemic period (i.e., March 2020). Moreover, the study showed the

<sup>21</sup> In the EU, data (as of 13 January 2022) suggests that on average, excess deaths peaked in November 2021 at 26.5 % — but also varied greatly between individual MS (that month, between -0.5 % in Sweden and 88.2 % in Bulgaria) (Eurostat). Data for SN are not available yet.

<sup>22</sup> It must be stressed at the beginning that one needs to be careful while comparing and contrasting COVID-related data, given that as the WHO and Johns Hopkins University, the two main sources for cross-country analysis, rely on national data — and different countries have not only different capacities for data collection but also different policies for, e.g., COVID-19 testing (Karanikolos, M. and McKee, M.)

<sup>23</sup> Broader MENA region according to World Bank’s aggregation.

pandemic disproportionately affected the poor and vulnerable, but also created a group of 'new poor' — 'those who were not poor in the first quarter of 2020 but have become poor since' (Hoogeveen, J. G. and Lopez-Acevedo, G.) — and that the latter group was less likely to obtain governmental assistance as previously they were on the radar of social services. The macrosimulations conducted by the World Bank team estimate that, in 2020, poverty increased by 7.3-11.9 p.p. (up to 22.5 %-27.1 %) in Tunisia. In Lebanon, poverty increased by 13 p.p. in 2020 and a further 15 p.p. in 2021 for Lebanese nationals, and 39 p.p. in 2020 and 52 p.p. in 2021 for refugees. At the same time, the GINI index is forecasted to rise from 37 % to 39-41.4 % in Tunisia and from 33 % to 34 % in Palestine.

The pandemic also underlined the painful reality of a lack of economic diversification, in particular, an overreliance on the tourism sector. With international arrivals declining by 73 % in 2019/2020 and 79 % in 2020/2021 in the broader MENA region compared to 2020, international tourism receipts in the region declined by USD 28 billion (-69 %) in 2020/2019 (World Tourism Organization). Similarly, a drop in oil prices caused temporary fiscal problems among oil exporters, albeit the former have already rebounded.

The education sector suffered as well, as funding was redirected towards immediate mitigation needs and families' abilities to afford tuition fees decreased. Moreover, with school closures and/or the shift to online education, many less well-off students were cut off from classes altogether due to lack of internet access and/or a computer (Sawahel, W.). The pandemic adversely affected the internationalisation processes of higher education as well.

The pandemic was also an excuse for politicians throughout the region (and beyond) to indulge in authoritarian tendencies. On numerous instances, those who contradicted the official narrative on the pandemic (Algeria) or criticised the government's response to the COVID-19 crisis (Egypt, Israel, Palestine, Jordan and Tunisia) were arrested, prosecuted or financially punished — all under pandemic-related emergency laws and rulings (Project on Middle East Political Science, 2021; see also Aidi, H., for analysis on Tunisia and the African continent). Restrictions to personal movement, introduced alongside school closures and travel bans in order to contain the spread of the disease, were also used to outlaw protests and demonstrations.

At the same time, the silver lining of the pandemic has been the renewed determination of governments to tackle issues such as the size of the informal economy or the performance of social protection schemes, as well as to accelerate the speed of digital transition in both the public and private sectors. Online vaccination registration schemes as well as digital vaccination certificates were introduced, e.g., in Jordan, Israel and Tunisia, and governments used digital platforms to disburse pandemic-related assistance (Idlebi, N.).

Moreover, despite pessimistic predictions concerning the 'sharpest decline of remittances in recent history' (initially 19.6 % year over year [y/y] subsequently revised down to 8 % y/y), the flows of money to the SN region from diasporas proved countercyclical to the pandemic and remained resilient (World Bank, 2020a). In fact, in 2020, they actually grew by 2.3 % y/y up to USD 56 billion and, in 2021, by an estimated 9.7 % y/y up to USD 62 billion in the broader MENA region (World Bank, 2021c; World Bank, 2021f). However, the performance was uneven. The largest growth in both years was registered in Egypt and Morocco and to a lesser extent in Tunisia. These remittances were one factor that prevented private consumption in Egypt from falling. In contrast, in Palestine, Jordan and Lebanon, declines were noted. In the latter, in 2020, a drop of 15 % y/y or USD 1.1 billion was witnessed — and yet, between 2019 and 2020, because of the abovementioned economic collapse in the country, the proportion of remittances to Lebanese GDP increased from 14.3 % to 18.9 %.

Attempts at mitigating the adverse effects of the pandemic, with fiscal support packages amounting to 2.7 % of GDP on average in the region, are further deteriorating the budgetary situation of these countries (Hoogeveen, J. G. and Lopez-Acevedo, G.). A wide variety of social protection responses were implemented: from cash-based transfers (everywhere but Libya) and pensions and disability benefits (Algeria, Egypt, Morocco and Tunisia) to wage subsidies (everywhere but Syria and Libya) and labour regulation adjustments (Algeria, Jordan, Morocco Syria; Iyer, D.)<sup>24</sup>.

The EU has actively supported the SN countries (apart from Israel) throughout the duration of the pandemic, delivering under the umbrella of Team Europe over EUR 2.3 billion in assistance between May 2020 and December 2021 (European Commission, 2021d).

### 1.2.5 Migration pressure

Due to many geopolitical, political and socio-economic factors, the migration pressure from the SN countries remains relatively high. Although according to United Nations High Commissioner for Refugees (UNHCR) data, sea and land arrivals have consistently dropped since 2015 (UNHCR), the latest preliminary figures collected by Frontex show that 'the total number of illegal border-crossings in 2021 was just short of 200 000, the highest number since 2017. This is an increase of 36 % when compared with 2019 and an increase of 57 % compared with 2020' (Frontex), with the Central Mediterranean route being the most used migratory route to Europe in 2021. This route noted an 83 % increase in detections in year-on-year terms, and Tunisian migrants were most frequently detected. Alarming, the estimated number of missing and dead in the Mediterranean routes also increased in 2021 in comparison with the previous year, as it amounted to 1 865 people (International Organization for Migration)<sup>25</sup>.

Data on the intentions to emigrate of the citizens of SN countries put in perspective the current trends in the region. According to a large survey released in 2016 on youth ranging from 15 to 29 years old in Algeria, Egypt, Lebanon, Morocco and Tunisia, 24 % of those interviewed have expressed the desire to emigrate or re-emigrate from their countries (from 7 % in Morocco to 53 % in Tunisia) (Boucherf, K.). As reported by another more recent survey (ASDA'A BCW, 2021b), the incentive to emigrate for many young people from Arab countries remains strong. The 2021 Arab Youth Survey findings revealed that although the propensity to emigrate now significantly decreased (from 42 % in 2020 to 33 % in 2021), more than 40 % of the young people in SN countries such as Morocco (56 %), Lebanon (48 %), Jordan (47 %), Syria (45 %), Algeria (43 %) and Palestine (42 %) were still actively trying to emigrate or had considered emigrating in the past.

In addition to the emigration of their citizens, countries such as Morocco, Algeria, Tunisia or Egypt are now on the way to switching from being sending countries to becoming transit and receiving countries, as migrants and asylum seekers coming from Sub-Saharan Africa and the Middle East become trapped in the region on their way to the EU. As of mid-2020, Libya and Egypt were among the countries in North Africa hosting the highest number of international migrants (826 537 and 543 937 people, respectively: Global Migration Data Portal)<sup>26</sup>. Moreover, there are over 1.5 million Syrian refugees in the SN countries, mainly in

<sup>24</sup> For a detailed and most recent (February 2022) overview of support measures introduced in Egypt, Jordan, Morocco and Tunisia, see Krafft, C., Assaad, R. and Marouani M. A.

<sup>25</sup> The estimates refer to the Western, Eastern, and Central Mediterranean routes. In 2020, the number of missing and dead amounted to 1 449 people.

<sup>26</sup> The study also mentions Sudan as the country hosting the highest number of international migrants in the Northern African region (1.4 million people).

Jordan and Lebanon<sup>27</sup>. Awareness among the citizens of the EU MS concerning the role of these countries in hosting large numbers of refugees is, however, limited.

### 1.2.6 Looming environmental crisis

The Intergovernmental Panel on Climate Change (IPCC) has identified the Mediterranean region as a climate change hotspot (EcoPeace Middle East). While the global mean surface temperature is now around 1.1°C above pre-industrial levels (IPCC), across the Mediterranean it stands at 1.54°C with a warming trend of about 0.03°C per year compared to 0.02°C in other parts of the world. As a result, once the global temperature exceeds the 1.5°C threshold identified in the Paris Agreement, the Mediterranean region at that time will be warmer by 2.2°C (UNEP/MAP & Plan Bleu). The second problem concerns environmental stresses such as 'water scarcity, arable land depletion, air pollution, inadequate waste management, loss of biodiversity, declining marine resources and degradation of coastal ecosystems' (Abumoghli, I. and Goncalves, A.), which will be further aggravated by the temperature rise, in particular in coastal areas which are urbanised and concentrate high densities of population. Combined, these shocks may have serious impacts on the daily lives of the region's citizens, i.e., with regards to food security and access to fresh water. Extreme weather phenomena, especially droughts, will change land use in agriculture and the distribution of resources, affecting food quality and prices as well as its availability (Abel, G. J. et al.). Internally, food and water shortages in countries where food insecurity is an issue and in which households spend a large proportion of their income on nourishment might increase the risk of protests against the authorities or other conflicts (Brinkman, H. J. and Hendrix, C. S.) (for information on how the Russian invasion of Ukraine can further exacerbate the food insecurity issue in the region, see Section 1.3).

Climate change and environmental stresses can also hamper economic growth, thereby exacerbating poverty and social instability. Another threat is related to increased migration flows. Climate change will worsen the situation of farmers in rural areas and accelerate migration to already vulnerable cities (Brown, O. and Crawford, A.), as, recently, urbanisation rates in coastal cities have continued to increase at unsustainable rates (UNEP/MAP & Plan Bleu). Other threats related to climate change in this region include the potential militarisation of strategic natural resources — especially water — as access is seen as a key dimension of internal security (interview no. 4). For example the recent conflict between Egypt and Sudan and Ethiopia over the massive hydroelectric dam being built by the latter country on the River Nile – the Renaissance Dam (United Nations). All in all, these illustrate that climate change coupled with other environmental stresses will not only impact marine and land biodiversity, but, most of all, the ecosystem services they provide will be seriously tested (MedECC). Assessing the region's preparedness for such shocks and disasters is of the utmost importance for the EU not only because of potential conflicts resulting in migration inflows, but also due to the fact that other superpowers such as China are already exploiting the scarce Mediterranean resources and infrastructure (i.e., water management) for its own geopolitical purposes, not always aligned with EU interests (Gaub, F. and Lienard, C.).

Due to geographical and socio-economic heterogeneity in the region, the scale of the environmental crises among the SN countries differs. For example, in 2016, deaths attributable to ambient air pollution exceeded 150 000 in Egypt; in Libya, the number of was below 5 000 (WHO, 2018). Nonetheless, common findings from the literature and interviews do emerge. The table below summarises the level of preparedness for some of the current climate change shocks in the region. Given the limited space for detailed analysis, only shocks and impacts directly pointed out by interviewees have been described.

<sup>27</sup> As of the 3 February 2022 update on the UNHCR's Refugees Operational Data Portal. In addition, one should note that in Turkey there are over 3 million Syrian refugees, so in total there are more than 5 million Syrian refugees in the region.



**Table 3 Level of preparedness for potential future climate crises (slow onset changes and sudden disasters) and their impact on society and economic performance across the Southern Neighbourhood countries**

Climate change shock	Level of preparedness	Impact on society
<p><b>Sea-level rise (SLR) leading to flooding or submersion.</b> Due to the absence of significant tides, infrastructure and homes are built close to sea level; hence, they are particularly vulnerable to SLR. In Egypt, around 21.5 % of the population lives below an altitude of 5 metres, followed by Tunisia with 8.5 % (World Bank, 2013). This is also where many world heritage sites are present (hence there is vulnerability to flooding or submersion). The Nile Delta, where one-half of the Egyptian population lives (Delta Alliance), is a particular hotspot: a low-lying and very densely populated area with generally poor incomes and poor adaptation and resilience capacity.</p>	<p>Generally low, but with extremely large discrepancies in terms of available resources to adapt to SLR. While no one will let Venice become a new Atlantis, and massive infrastructure projects are currently underway in there (although it is a world heritage, relatively few people actually live there), the Nile Delta and its millions of inhabitants are much less likely to attract such projects and resources.</p>	<p>Potential submersion of homes, infrastructure, and heritage sites. The building sector already requires adaptation measures such as construction of protection infrastructure (i.e., dykes, pumps). Likely to be extremely costly and socially difficult to negotiate for any activity or infrastructure close to sea level.</p>
<p><b>Changes in water regimes</b> which may lead to: less precipitation; more evapotranspiration; the increased concentration of rainfall in time (extreme rain events); and the increased salinity of close-to-shore groundwater resources. The SN is already a water-scarce region and it is believed that the situation will be exacerbated in the future. This will be coupled with flooding from extreme rainfall events as well as further desertification.</p>	<p>Agriculture — the most water-consuming sector — already requires significant adaptation (changes in crops, technical adjustment of irrigation systems, improvements in governance and allocation of water resources), yet progress here is rather slow. The preparedness level for flooding from extreme rainfall events is also poor (absence of alert systems to inform populations and the artificialisation of riverbeds accentuate the problem). Yet, awareness to the need for change seems to be quite high in particularly water-scarce regions.</p>	<p>Increasing water shortages and food insecurity (countries from the region already rely on food imports); potentially abandoning some activities, for example, water restrictions for the tourism sector (i.e., no more swimming pools). Other examples include: abandoning certain crops (e.g., watermelon, citrus fruits, tomatoes for export; changes in agricultural trade — crops traded, quantities traded, directions of trade (increasing imports and decreasing exports). Additionally, increasing tension between water uses (agriculture, domestic, industry, tourism) in regard to the allocation of the decreasing amount of available water resources as well as difficulties negotiating the allocation of transboundary water resources.</p>
<p><b>Rising temperatures</b> (air and sea) make living conditions of people,</p>	<p>It is almost impossible to prepare for constant heat waves, yet investments in resilience and</p>	<p>Assuming continued insufficient adaptation and mitigation measures (the adaptation gap; United Nations</p>

plants and animals more difficult (Dosio, A.)	adaptation measures are surely insufficient.	Environment Programme), these shocks, combined with the region's aridity and lack of precipitation will lead to disease or famine (Varela, R., Rodríguez-Díaz, L. and deCastro, M.): heatwaves will impact human health and will increase the morbidity and mortality of the most vulnerable. There will be negative impacts for agriculture, aquaculture and fishing yields, as well as tourism attractiveness.
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Source: Authors' own elaboration based on inputs from interviews no. 4 & 5.

### 1.3. The Euro-Mediterranean ramifications of the Russian invasion of Ukraine

#### 1.3.1. A widening gap in reactions, narratives and perceptions

The war in Ukraine, which broke out following Russian aggression on 24 February 2022<sup>28</sup>, has already confirmed and is likely to reinforce the trends and phenomena described in Sections 1.1 and 1.2 of the present study.

First, and although it is too early to draw final conclusions, the war has already illustrated the growing gap between both sides of the Mediterranean described in Section 1.1. Official reactions to the war in Ukraine have shown, in some cases more than in others, the lack of alignment between the positions of the EU on the one hand and of its SN on the other. From the EU's SN, only Israel sponsored the UN General Assembly resolution adopted on 1 March 2022 deploring the Russian aggression and expressing support for Ukrainian territorial integrity (United Nations, 2022). Syria, unsurprisingly, rejected the resolution, Algeria abstained, and Morocco did not participate in the vote. While the United States has been confused with and alarmed by the relative neutrality of some of its Gulf Allies and the balancing act of those countries between the United States and Russia, the EU has also shown incredulity when some of its SN expressed their positions regarding the conflict. Indeed, following the release of a note by the Tunisian Ministry of Foreign Affairs (République Tunisienne, 2022), the EU Ambassador to Tunisia tweeted that 'when you remain neutral between the aggressor and the victim, you take side!' (Cornaro, M. [@AmbUeTunisie]) In the same vein, a phone exchange between Egypt's President Sisi and President Putin on 9 March where both leaders 'discussed ways to enhance strategic cooperation frameworks between their countries' (Zaid, M. A.), according to media reports, is unlikely to go unnoticed in EU capitals.

Official reactions are not the only indicators of such misunderstandings. Public reactions in SN countries to European actions or discourses on the war in Ukraine have also illustrated Euro-Mediterranean suspicions and frustrations (described in Section 1.1.2). While it is too early to provide a full-fledged quantitative and qualitative analysis of social media patterns around the war in Ukraine, it is not too adventurous to write that the magnitude of criticism towards the EU (or more generally 'the West') came as a surprise to the EU. Parallels between the Israeli occupation of the Palestinian territories and the Russian aggression in Ukraine or between the situation in Syria and the war in Ukraine have been recurring themes on Twitter and other traditional and social media (even as some anti-Russian sentiment was expressed as well – conducting of an in-depth quantitative study on social media discourse in SN surrounding the war in Ukraine is recommended in due time). Similarly, the EU's actions against Russia or mobilisation in favour of Ukrainian refugees have been met with accusations of hypocrisy given the EU's perceived lack of action in relation to

<sup>28</sup> After the first version of this report was completed.

other conflicts. Unfortunate remarks by some European journalists or politicians regarding the 'Europeanness' of Ukrainian refugees (as opposed to refugees coming from the other side of the Mediterranean) as well as reports of the differentiated or racist treatment of MENA nationals trying to flee Ukraine (Silber, C. and Wilder, C.) have also prompted many reactions pointing to EU's double standards, racism and biased approaches. This further deepened the perceptions described under Section 1.1.3 of the EU as a neo-colonial and racist entity. An informed observer based in Tunisia wrote in a Tweet 'apart from the Westernized, US/EU funded elites, the majority of people I talked to are either pro-Putin, or very critical of the US/EU' (Cherif, Y. (@Faiyla)). Discourses on the EU and the West's responsibility in this war have also gained ground.

**Figure 1. Tweets selected by the authors to illustrate the points made above**



Source: Twitter

In light of this, the EU should carefully analyse to what extent the reactions from some of its partners confirm a realignment of SN countries (described in Section 1.1.2) and draw adequate strategic conclusions. When responding to positions taken by SN countries that go counter to its own interests, the EU should find a complex balancing act between being firm and not being perceived as interfering or threatening. From this perspective, the HR/VP speech in the European Parliament on 1 March 2022 where



he said 'we will remember who has not been with us in this solemn moment'<sup>29</sup> was indeed perceived as very firm.

### 1.3.2. Growing volatility in the region

The war in Ukraine accelerates or exacerbates the (geo)political and (geo)economic trends described in Section 1.2. The visible attempt of countries of the region to avoid being dragged into the conflict and to safeguard their relations with Russia can be partly analysed as the consequence of the United States' 'retreat' described in Section 1.2.2 and the reshuffling of alliances in the region. It is too early to analyse how the war in Ukraine will impact the direct presence of Russia in conflict theatres such as Syria or Libya or its relations with already close allies such as Algeria. As suggested by some analysts (Soler i Lecha, E., 2022) Russia could be tempted to play the destabilising card in the region further, in order to reinforce its negotiating position in Eastern Europe.

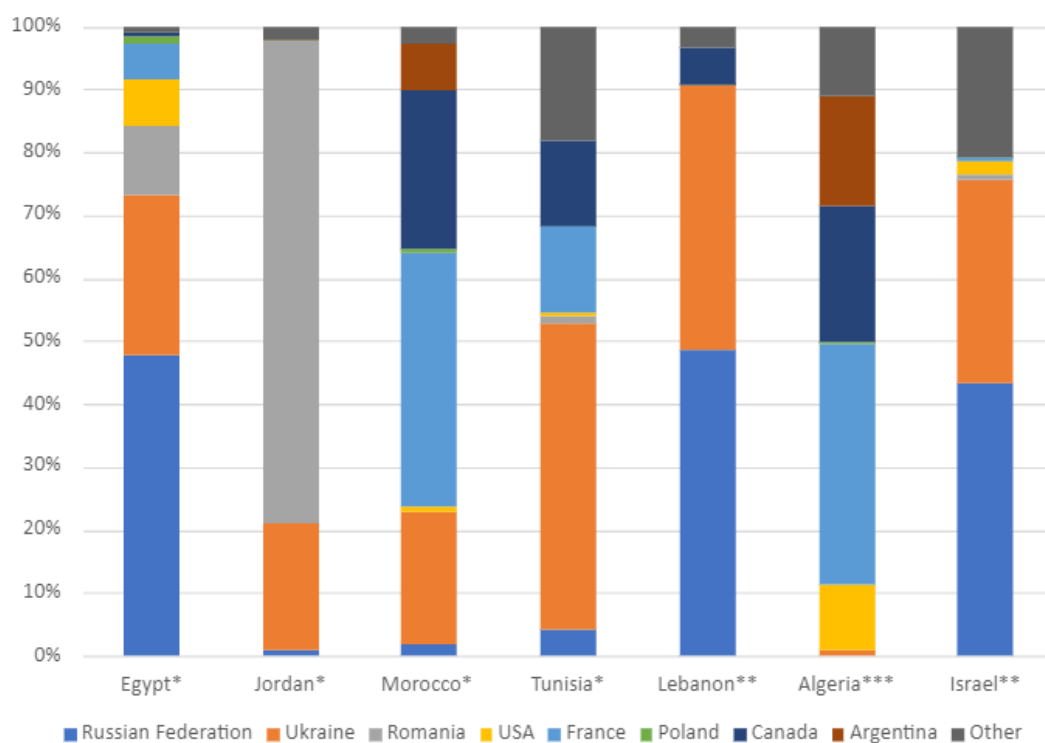
The Moroccan decision not to participate in the United Nations General Assembly (UNGA) vote can also be read through the lens of the Algeria-Morocco conflict. Rabat may have wished indeed to send a discreet invitation to Moscow to temper its pro-Algerian stance. Yet another consequence of the Russian invasion of Ukraine may be to further rehabilitate the use of force to solve bilateral conflicts in the region, thereby increasing an already very volatile security situation, although countries of the region will have duly noticed the costs associated with such a military operation as well as the military risks involved.

The socio-economic consequences of the war in Ukraine for already fragile economies such as Lebanon or Tunisia may be very difficult to handle and may trigger further social movements. Some countries of the region, such as Egypt, Israel and Lebanon, and to a lesser extent Tunisia, very much depend on Russia and Ukraine for their imports of food products<sup>30</sup> (see Figure 2 below and, e.g., Sidło, K.W. et al., 2021). Therefore, these countries have been directly affected by the suspension of Ukrainian exports for a number of agricultural commodities as well as the related increase of the price of wheat in global markets (Rattner, N. and Barnett, A.). More broadly, the increase in food prices will add a burden to the state budgets, since these products tend to be heavily subsidised. The food security issue is far from anecdotal and is likely to have wide-ranging social, economic and political consequences (see, e.g. Rattner, N. and Barnett, A.). One country that may be more immune to this is, in the light of the hike in energy prices, hydrocarbon-producing Algeria. Egypt, on the other hand, will likely be additionally affected by the drop in the number of tourists coming from Russia and Ukraine, who used to make up approximately one-third of all visitors to the country (Gomaa, A.; Emam, A.).

<sup>29</sup> See the debate here: [https://www.europarl.europa.eu/doceo/document/CRE-9-2022-03-01\\_EN.html#creitem9](https://www.europarl.europa.eu/doceo/document/CRE-9-2022-03-01_EN.html#creitem9)

<sup>30</sup> In 2019, imports from Russia and Ukraine constituted 91 %, 75.5 % and 74 % of all wheat imports for Lebanon, Israel and Egypt, respectively (FAOSTAT)

**Figure 2. Wheat imports by selected SN countries by trading partner (measured in value of imports in USD)**



Source: Own preparation based on data from FAOSTAT, Detailed trade matrix, 2020 (no data for Palestine).

### 1.3.3. A growing interdependence

While the war in Ukraine may aggravate the gap between both sides of the Mediterranean, and while there are serious risks for an increasingly volatile Southern Mediterranean, it also highlights the interdependence of both rims.

Importantly, plans to become less dependent on Russian fossil fuels (indeed, the EC outlined a plan to become fully independent from Russian gas and oil by 2030)<sup>31</sup> mean that the EU will now invest in the Gas for Gaza pipeline and that gas imports from Algeria are likely to increase. Moreover, Egypt, presently responsible for just 0.04 % of the EU's natural gas imports, is keen on expanding its liquefied natural gas (LNG) exports, although given the current state of the infrastructure this is more of a medium- to long-term possibility (Espanol, M.). The Eastern Mediterranean pipeline project might regain attention from the EU, which as of end-2021 was reportedly hesitant about its viability both in environmental and commercial terms. At the same time, given Turkey's opposition to the project and the importance of Ankara as a key NATO ally in the face of Russia's invasion of Ukraine, any negotiations over future energy infrastructure endeavours might prove challenging.

On the other hand, work on the development of less contentious projects on renewable energy will be accelerated, especially since such efforts are in line with the European Green Deal. In particular, the EU may want to accelerate cooperation under the MENA Hydrogen Alliance launched in 2020 — a consortium of partners representing all sectors potentially interested in clean hydrogen from across the Mediterranean, which, among others, implements pilot projects on a small and large scale and advocates for favourable policy and regulatory frameworks (Dii Desert Energy). Such an acceleration would be in line with the measures proposed under REPowerEU (European Commission, 2022c), which mention, among others, the

<sup>31</sup> Currently, 45 % of the gas, 25 % of the oil and 45 % of the coal that the EU imports comes from Russia. (European Commission, 2022b)

creation of a hydrogen accelerator. This might imply a further tightening of cooperation with current net energy importers such as Morocco and Jordan over imports of renewable hydrogen.

## 2. Swimming against the tide: the beginning of a new phase in Euro-Mediterranean relations?

### 2.1. The Joint Communication on the New Agenda: the method, the new and the not-so-new

#### 2.1.1. The process leading to the New Agenda

The political rationale of the February 2021 Joint Communication on a 'Renewed partnership with the Southern Neighbourhood: a new Agenda for the Mediterranean' (henceforth: Joint Communication) was three-fold. First, the EC was eager to transfer its new policy priorities to its SN policy. The second intention was to update the southern dimension of the ENP in the light of the COVID-19 crisis. Third, there was political momentum to release an initiative in the wake of the 25<sup>th</sup> anniversary of the Barcelona Declaration and try to re-dynamize the ENP against the context of the relative fatigue and disillusion described above (see Section 1.1.1). As mentioned previously, this Joint Communication is the third of a series of similar policy documents initiated by DG NEAR (the first being a Joint Communication on the Eastern Partnership and the second being a Communication from the European Commission on the Western Balkans).

However, the Joint Communication was not branded as a full-fledged review of the ENP, as the 2015 review was. To a large extent, it can be understood as a repackaging of existing policy initiatives and is characterised by an important degree of continuity with the same approach prevailing since the last review of the ENP in 2015. This may explain partly why the EC and the EEAS did not deem it useful to carry out a large consultation exercise with civil society as part of the preparation of the Joint Communication as it had done in 2015, although such a structured consultation was conducted ahead of the Joint Communication on the EaP in March 2020 (European Commission, 2020f). It is only following the publication of the document that a broader range of stakeholders (including financial institutions) have been involved in discussing the implementation of the New Agenda.

There was indeed a sense of urgency that materialised in the relatively swift preparation of the Communication, with consultations being limited to official channels with governments. The idea of a Joint Communication was first presented by the EU to its SN partners in Barcelona in November 2019. On this occasion, a new Ministerial format was inaugurated back-to-back with the annual Foreign Ministers meeting of the UfM, where only EU Ministers would meet with their SN ENP partners (leaving the Western Balkans, Turkey and Mauritania aside). In the wake of this first collective exchange, Commissioner Várhelyi took the lead in running bilateral consultations on the content of this Joint Communication, especially with the objective to include a reference to flagship projects that would really reflect the priorities of the partner countries. Commissioner Várhelyi organised multiple phone calls and video conferences with his counterparts in the region. The consultations were particularly intense and thorough with Morocco (interview 6) and much less with Algeria because of political tensions between Brussels and Algiers (interview 16).

#### 2.1.2. Assessing the continuity of the main ENP principles

There is clear sense of continuity with the previous ENP review exercise in terms of the main principles and methodological paradigms. The Joint Communication reiterated its commitment to already established principles, including differentiation (referring to the need to 'take into account the region's diversity, interests, and needs'), support to the Union for the Mediterranean and the regional dimension ('Efforts will

continue to enhance regional, sub-regional and inter-regional cooperation. The role of the Union for the Mediterranean remains indispensable'), the importance of the neighbours of the neighbours ('There is also a need to strengthen coherence between what the EU does with Northern African partners and the rest of the African continent. Similarly, inter-regional cooperation with the Gulf and Red Sea regions is important...') and co-ownership ('Continuous and forward-looking dialogue between the EU and its partners will ensure mutually beneficial partnership and co-ownership').

The Joint Communication also suggests that the EU is keen on activating triangular cooperation frameworks, a concept in which the EU has invested in recent years, at least discursively. However, interviews conducted by the authors seem to suggest that, at the time of writing this report, the EU had not started to actively explore concrete ideas with Gulf partners, e.g., how to join forces with the EU and contribute to the expected multiplier effect of the European Investment Plan (interview 49), although there are expectations that the Joint Communication to be released in March 2022 would include language on this. In this regard, the delays with the Gaza desalination plant, a project funded mostly by the EC and a consortium led by the Islamic Development Bank (based in Saudi Arabia), seem to illustrate the complexity of such triangular endeavours (interview 42). Some interviewed officials argued that the fact that Gulf countries were covered by Directorate-General for International Partnerships (DG INTPA), which deals with developing countries, was an anomaly (interviews no. 27 & 42).

As mentioned above, the Joint Communication neither breaks with established practices under the ENP nor proposes brand new initiatives. However, it does amplify and provide a new spin on existing practices. One example is on political dialogue. Both the Joint Communication and the ensuing April 2021 Council conclusions on the SN express the intent to reinforce political dialogue mechanisms. The precedent of the Foreign Ministers meeting in the ENP's format, back-to-back with annual meetings of the UfM Foreign Ministers, which was inaugurated in 2020 as mentioned above, is consecrated by the Joint Communication. The Joint Communication even proposes to convene sectoral ministerials or meetings of senior officials in this format, as well as a meeting of the Heads of State and Government, a format that some MS are keen to exploit (interviews no. 25 & 27), while others are more reluctant due to fear of duplicating the UfM format (interview no. 42). The above-mentioned 2021 April Council conclusions (Council of the European Union, 2021a) on a renewed Partnership with the Southern Neighbourhood contain particularly keen language on the intention to use this framework in order to reinforce political dialogue in the ENP format.

Another example is communication. The importance of visibility and communication has routinely been mentioned in ENP-related documents. However, this Joint Communication acknowledges the importance of strategic communication and countering disinformation in the SN context in a reinforced manner. The EU embraced a strategy to counter disinformation in 2015, but the focus has been most prominently on Russian disinformation activities in the EaP. The work is conducted by the EEAS Strategic Communication Division and its Task Forces (STRAT.2), placed within the Directorate for Strategic Communication and Foresight of the EEAS — in the case of the SN, the Task Force South. The mandate of the task forces was broadened in 2019, with the role of the Task Force South being to 'promote EU policy actions in the MENA region through strategic communications' as well as 'fostering healthier information environments in the region, by facilitating support to independent media as well as contributing to civil society resilience against disinformation, information manipulation and interference' (European External Action Service, 2021d). Currently, each EU Delegation in the South host a Disinformation and Strategic Communication Officer. Additionally, the position of EU Regional Media Officer, based in Beirut, was created (at the time of writing, he had more than 27 000 followers of his Twitter account).

### 2.1.3. The contentious questions of conditionality

The principle of conditionality deserves further attention. At first sight, continuity seems to prevail when it comes to the principle of conditionality, which is indeed stressed in the Joint Communication ('The level of EU financial support will be proportionate to each partners' ambitions and commitment to shared values, the agenda of reforms, including on governance, and their implementation'). It echoes Article 19 of the Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI – Global Europe) regulation, which establishes that 'The commitment to and progress in building deep and sustainable democracy, the rule of law, good governance, human rights, and the fight against corruption' is one of the criteria used to justify the differentiated treatment of beneficiaries. The corollary of this principle of conditionality is indeed the incentive-based approach according to which 'The level of support will be adjusted to each partner's respect for commitments and their level of implementation as regards shared values and reform progress, in particular on governance and the rule of law'. The envelope earmarked for the incentive-based approach is 10 % of the overall financial allocation foreseen for the EU's neighbourhood.

However, there is an open discussion regarding the implementation of the principle of conditionality in the future, which is articulated around three issues.

First, there is a difference between the European Neighbourhood Instrument (ENI) regulation and the new NDICI – Global Europe regulation when it comes to the incentive-based approach. It is interesting to note that 'cooperation on migration' as well as 'economic governance and reforms' have been added to the previous list of criteria which would determine the allocation of funds under this incentive-based approach. The criteria mentioned in Article 19 are as follows:

*'Performance and progress towards democracy, good governance and the rule of law including cooperation with civil society, human rights including gender equality, cooperation on migration, economic governance and reforms, in particular those reforms that have been jointly agreed'.*

There is also a trend to give more weight to the socio-economic dimension of human rights, the concept of right to development, education and health, where it is easier to reach an understanding with partner countries (interview no. 23), which could possibly result in paying less attention to more political aspects of human rights.

Second, and partly related to the previous point, there are doubts concerning the relative weight of human rights, support to rule of law and democracy in this list of criteria. In a context where migration has become the main priority of the EU, where SN partners are increasingly reluctant to any form of interference (interviews no. 26 and 29), and where EU competitors are much more realist in their approach and do not condition their assistance (interview no. 6), some think that it is counterproductive for the EU to spend too much capital on the defence of human rights. In this respect, there is a rift within the Council of the EU between northern EU countries much keener on human rights conditionality and southern European countries (interviews no. 25 and 26). At the time of writing this report, negotiations between Egypt and the EU on the financing agreement are still ongoing, whereby Egypt refuses the conditionality language, which it sees as too asymmetrical (interview no. 29).

The third relevant aspect here is that, despite the apparent continuity of the language used in the Joint Communication, there is the concern that the human rights conditionality may lose its actual substance under the new approach dominated by the investment paradigm (interview no. 16). The argument is that the human rights conditionality is very loose or absent in the agreements of European financial institutions with their partners (interview no. 27). At the time of writing, it is still difficult to substantiate this claim. It is also true that the European Fund for Sustainable Development Plus (EFSD+) is covered by the NDICI –

GLOBAL EUROPE regulation and therefore by its human rights clauses. Moreover, and more broadly, the EU has been more adamant about its prioritisation of human rights, having adopted the global human rights sanctions regime in December 2020 (Council of the European Union, 2020). The EU is expected to closely steer its financial institutions and the terms of their lending agreements with some countries and make sure it includes some language on human rights (interview no. 24). This is in line with the consistent trend of reinforcing EU policy steer over its financial institutions, about which a report of the Committee on Development (DEVE) of the European Parliament is expected<sup>32</sup>.

#### 2.1.4. A more flexible and consolidated approach?

Arguably, the main novelty in the EU's financial approach towards the SN is a move towards consolidation, simplification, more flexibility and geographizations (well as the 'policy first' principle)<sup>33</sup>. The latter means that geographic rather than thematic programming forms the basis of the NDICI – Global Europe, with the rapid response pillar complementing both. Indeed, in financial terms, out of the overall EUR 79.5 billion allocated, just over two-thirds (76 %) are dedicated to geographic programming (of this, 'at least' EUR 19.32 billion is to be dedicated to both the Southern and Eastern Neighbourhood), with EUR 6.358 billion foreseen for thematic programmes, EUR 3.182 billion — for the rapid response mechanism, and an additional EUR 9.53 billion for a 'cushion' for 'unforeseen circumstances, new needs, emerging challenges or new priorities' (European Parliament and Council of the European Union, 2021b). The ongoing war in Ukraine may affect the distribution of funds towards the SN, although presumably the 'cushion' money may be used for that purpose first (no decision to this effect has been taken as of April 22, 2022, however). Moreover, increasing reliance on the use of guarantees in order to achieve leveraging effects can be noted.

These principles are in line with the broader approach towards external policy exemplified by the recently (1 December 2021) launched Global Gateway strategy (European Commission, 2021f). While its technicalities are not known yet, it has been introduced as an umbrella that should cover all the EU's external actions and help the EU to position itself globally (interview no. 46). This global connectivity strategy will be applied to the funds available under the NDICI – Global Europe, the 'main instrument for EU cooperation and development with partner countries' established through the regulation of 9 June 2021 (European Parliament and Council of the European Union, 2021b). Moreover, its ambition is to mobilise up to EUR 300 billion in additional investment between 2021-2027 in order to 'to boost sustainable links around the world' (while there is no reference to the Chinese Belt and Road Initiative (BRI) anywhere in the document, in some ways the Global Gateway might be seen as a response to BRI). Another bid to reduce fragmentation was through the creation of Team Europe, under which funding from the EU, MS, the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD) was gathered to provide partner countries with support in battling the effects of the COVID-19 pandemic (see more in Box 1).

Finally, under the consolidation and simplification theme, and within the spirit of 'tear(ing) down artificial boundaries between instruments' (European Commission, 2020g), the NDICI – Global Europe itself integrates seven instruments (and — at least partially — 12 previous legislative pieces) from the previous MFF (2014-2020).

The new investment framework of the NDICI – Global Europe, building on the experience of the External Investment Plan, will comprise the European Fund for Sustainable Investment (EFSD+) and the External Action Guarantee, combining blending and budgetary guarantees. The EFSD+ was designed to be more consolidated as well, covering all investment products and all countries under a 'common set of rules and

<sup>32</sup> See the draft opinion here: [https://www.europarl.europa.eu/doceo/document/AFET-PA-704787\\_EN.pdf](https://www.europarl.europa.eu/doceo/document/AFET-PA-704787_EN.pdf)

<sup>33</sup> European Commission, 2020d. For more information see, e.g., Lilyanova, V.



single governance’ (European Commission, 2020d). Under the 2021-2027 MFF, funding will be allocated in two ways: (i) sovereign and non-commercial sub-sovereign funding will continue to constitute the sole mandate of the EIB and (ii) other types of operations will be funded under ‘open architecture’, whereby European and international financial institutions can compete for funding.

As funds have not been pre-allocated, a certain element of competition will be present when allocating funds from EFSD+ (interviews no. 32, 39, 42 & 46). Within the ‘open architecture’ window, financial institutions will be applying for funding under open calls (yet to be launched). However, national governments in partner countries will be applying for the sovereign and non-commercial sub-sovereign funds available under the EIB mandate<sup>34</sup>. While such an approach allows for more flexibility in allocating funding for individual projects, on a regional and multi-country level as well, it raises the question of the capacity of each country to make the most of the opportunities offered. Importantly, in order to benefit from the EFSD+, countries must be able to contract debt; this is something that Algeria is not willing to (albeit joining the EBRD in October 2021 [Zgheib, N.] is a sign this attitude may change in the future) and Lebanon is not able to do, and the capacity of Tunisia is under question as well (interviews no. 21 & 39). The risk of lack of capacity of individual countries to fully benefit from this part of funding prevails despite the fact that under the EFSD+ regulation ‘special attention will be given to riskier areas/countries which until now have benefitted less from blending and guarantees’ (European Commission, 2021i). Given the already mentioned lack of conducive legislative and institutional frameworks in the majority of the SN countries, it is welcome that an indicative 10 % of each guarantee programme should be dedicated to technical assistance, and that technical assistance can be offered on *ad hoc* basis (European Commission, 2021i). In line with the ‘policy first’ approach, each operation proposed by the EIB will go through a three-stage approval process, giving the EC stronger oversight in a bid to ensure only proposals with the largest potential impact are selected (interview no. 46).

Funds from the EFSD+ will be channelled to the SN through a dedicated EIP accompanying the Joint Communication. Funds might be used in particular for priority areas 2.2 Strengthen resilience, build prosperity and seize the digital transition and 2.4 Green Transition of the Regional MIP, which have individual specific objectives corresponding to, respectively, (i) Flagship 2 ‘Modern effective administrations, governance and accountability’; Flagship 4 ‘Sustainable economies’; Flagship 5 ‘Connected economies’; Flagship 6 ‘Inclusive Economies’; and Flagship 7 ‘Digital transformation, research and innovation’ and (ii) Flagship 11 ‘Resource Efficiency, Including Water and Waste Management, and Biodiversity’ of the EIP.

Currently, a number of doubts remain as to how it will be rolled out. Indeed, one year since its publication on 9 February 2022, awareness regarding the details of the implementation of the EIP for the SN remains limited and questions remain regarding its technicalities (interviews no. 6, 25 & 26). The fate of the EIP is tightly dependent on the larger programming exercise of the NDICI, which has been delayed. The late adoption of the NDICI – Global Europe regulation and the delayed negotiation of partnership priorities with countries in the region<sup>35</sup> has, in turn, delayed the programming exercise. The Regional South Multiannual Indicative Programme was adopted in December 2021. Yet, the adoption of similar multiannual country programmes depends on the adoption of partnership priorities. Furthermore, there

<sup>34</sup> It is also worth mentioning at this point the changes in the functioning of the EIB, which is effectively becoming the EU’s development bank. Originally designed to operate in a low-risk environment — and requiring a guarantee from the EC otherwise — under its newly (2022) formed arm, EIB Global will operate in higher risk countries as well (in a move condoned by some of the interviewees [interviews no. 38 & 39], the EIB will move to open more offices beyond the EU).

<sup>35</sup> At the time of writing, negotiations seem to be more advanced with Jordan and Egypt.

are still many questions regarding how the EFSD+ will work, including from officials from MS following this region and EU officials posted in EU Delegations.

The above-mentioned uncertainty applies to the funds that the EC hopes to mobilise from public and private investors on top of the funds allocated to the SN under the NDICI – Global Europe (interviews no. 21, 38 & 39)<sup>36</sup>. Indeed, up to EUR 30 billion is expected to be raised, with the overall foreseen leverage factor of the NDICI standing amounting to an ambitious 10 (Tagliapietra, S.). This sum was perceived by the interviewees as ‘highly ambitious’ (in particular in countries with a deteriorating political and economic situation and thus investment climate, like Lebanon and Tunisia, where even the guarantees offered might not be enough to encourage potential investors) — but at the same time potentially insufficient to address all the issues listed under the New Agenda. This lack of clarity regarding how the amounts of funding are determined was raised in regard to the previous financial frameworks as well (see, e.g., Ghoneim, A. and Sidlo, K.).

As of the writing of the report (February 2022), the EIP ‘is indicative and non-exhaustive and may evolve depending on progress on policy and political issues and in bilateral relations between partner countries’ (European Commission, 2021g). Indeed, the Regional Multiannual Indicative Programme (MIP) provides indicative allocations only for the period of 2021-2024 (European Commission, 2021i). For the SN, EUR 474 million was allocated for that period (against EUR 632.24 million dedicated to the Eastern Partnership countries). This is on top of the EUR 1 248 million indicatively allocated to support blending under the Neighbourhood Investment Platform (NIP) and for the budgetary guarantees under the EFSD+ (against EUR 929.88 million for the EaP). Further allocations ‘as well as the possible modification of other substantial elements of this MIP, will be subject to a decision by the EU’ (European Commission, 2021i) and the review process will be held concurrently for the MIP and the Joint Communication (the technicalities of the review procedure remain unknown for now).

While this is not a new approach — indeed, under the ENP allocation of funding beyond 2004-2007, funding was to be allocated based on progress towards the implementation of Action Plans (European External Action Service) — few details are known beyond that progress in the implementation of flagship initiatives will be assessed and that the evaluation process will be conducted in consultation with ‘authorities and other stakeholders of the Neighbourhood Regional South countries’ (European Commission, 2021i) from partner countries. According to interview no. 32, new revision criteria compared to the previous financial horizons include progress on economic reforms and on migration cooperation.

The criteria for revision of the funding allocations for the EaP are more explicitly stated in its respective MIP (European Commission, 2021i), whereby only disbursement of the exceptional macro-financial assistance (MFA) shall be subject to ‘the fulfilment of the political pre-condition — respect of human rights and effective democratic mechanisms, including a multi-party parliamentary system and the rule of law. MFA is also conditional on the existence of a non-precautionary credit arrangement with the International Monetary Fund (IMF) and a satisfactory track-record of implementing IMF programme reforms. MFA funds are released in tranches strictly tied to the fulfilment of conditions aimed at strengthening macro-economic and financial stability, including by supporting structural reforms.’

Finally, it should be noted that compared to EIPs for the EaP and Western Balkans, the EIP for the SN is somehow vaguer and appears more early stage in terms of settlement on details. Moreover, when calculated in per capita terms, the funds allocated to (and expected to be leveraged for) the SN are less generous than those foreseen for the EaP and significantly less so than for the Western Balkans – although

<sup>36</sup> Similar doubts were recently raised regarding the EUR 150 billion expected to be raised for the Global Gateway, see: [https://www.europarl.europa.eu/doceo/document/E-9-2022-000734\\_EN.html?s=03](https://www.europarl.europa.eu/doceo/document/E-9-2022-000734_EN.html?s=03)



comparable to the funds foreseen for (Sub Saharan) Africa under the Global Gateway. To be precise, according to the preliminary estimates, in the SN the funds to be disbursed in the form of grants, blending, and guarantees under NDICI – Global Europe should amount to EUR 28 per capita and additional EUR 120 per capita is expected to be leveraged from public and private investors. In the EaP, those numbers stand at EUR 32 per capita and EUR 233 per capita respectively, and in the WB – at EUR 514 per capita and EUR 1 142 per capita respectively. At the same time, under the EU-Africa Global Gateway Investment package, approx. EUR 132 per capita is foreseen (EUR 150 billion in investments in total)<sup>37</sup>. Needless to say, the political and socio-economic situation in the SN differs significantly from that in the other two neighbourhoods — in particular in terms of the investment climate — and with the region being less homogenous this necessarily affected the process of the preparation of the plan.

How should the weight that the EU confers to investment and financial instruments in the Joint Communication be interpreted? Arguably, this comes as a response to a sense of disillusion with the impact of more classical instruments thus far, as described above (see section on ‘EU dilemmas’). The EU indirectly acknowledges the limitations of classical cooperation and even budget support, as well as the mixed results it has generated over the last decade in terms of transformative power (interview no. 20). For some, this new strategy means that socio-economic development becomes the first priority, and that the EU expects this would trigger changes in the governance as a result rather than as a condition (interview no. 16). In front of the scale of the systemic issues to be addressed in the SN and the urgency for the EU to support the socio-economic development of its neighbours to preserve its own interests, cooperation envelopes are often seen as insufficient (interviews no. 6, 7 & 9). The multiplier effect expected from the investment plan of the EU is presented as the right, if difficult to attain, response to the scale of the issues.

Official reactions to the New Agenda from SN countries, as exemplified by results of the Euromed Survey released in April 2021<sup>38</sup> as well as interviews conducted by the authors (e.g., interview no. 11) of this report, seem to indicate that this new approach is overall welcomed by the EU’s southern partners, who signalled that this corresponds to their priorities and is likely to serve their interests.

## 2.2. Accompanying the green and digital transitions in its Southern Neighbourhood: a consistent approach, up to the EU’s ambitions

### 2.2.1. Supporting the digital transition in the Southern Neighbourhood, beyond the slogan

Cooperation between the EU and its SN partners on digital matters in order to foster inclusive and sustainable growth in the Mediterranean is one of the key policy areas listed in the Joint Communication. Indeed, as underlined in the Digital Agenda for Europe (European Commission, 2010), digital transition is expected to boost socio-economic growth and the well-being of societies by virtue of, among others, creating new jobs, stimulating innovation and improving access to public services. This belief is applicable both to the EU itself and to its neighbourhoods (and beyond, as outlined in the EU’s Digital for Development Strategy). At the same time, even among the EU MS, the progress of the digitalisation process is uneven (European Commission — Digital Economy and Society Index, 2021b) and, on average, EU

<sup>37</sup> See more: [https://ec.europa.eu/info/strategy/priorities-2019-2024/stronger-europe-world/global-gateway/eu-africa-global-gateway-investment-package\\_en](https://ec.europa.eu/info/strategy/priorities-2019-2024/stronger-europe-world/global-gateway/eu-africa-global-gateway-investment-package_en)

<sup>38</sup> Inclusive growth is the number one challenge identified by southern Mediterranean respondents to the survey. Promoting the socio-economic agenda is also seen as the clearest opportunity for a renewed cooperation between the EU and partners. Respondents also identified that the EU’s strongest added value in the region was to contribute to sustainable and inclusive economic development.

countries are lagging behind economies such as United States, Iceland and Australia — or indeed Israel (which necessarily limits the scope of the EU's intervention in this field in that particular country — on multiple measures included in the International Digital Economy and Society Index (I-DESI) (European Commission, 2020c). Consequently, there is the question of the EU's capacity to support its neighbours while still undergoing the digital transition itself, as well as the best means of achieving its goals.

The Joint Communication structures the work in this area under four pillars: (i) governance, policy and regulatory frameworks; (ii) developing infrastructure and supporting universal access to enhanced, affordable and secure networks; (iii) digital literacy, skills and entrepreneurship; and (iv) digital services.

### **Governance, policy and regulatory frameworks**

With the exception of Israel, SN partner countries score low on the 'governance' pillar of the Network Readiness Index (ITU, 2021c), which includes indicators on regulation such as the legal framework's adaptability to emerging technologies, e-commerce legislation or regulatory quality.

One area where legislation is particularly weak and where change would be welcome is e-commerce (Youssef, A. B.). While throughout the pandemic the use of online shops increased (Scrase, J.; ASDA'A BCW, 2021b), many of them function in an informal sector, with payments made on delivery — in Tunisia, the informal e-commerce sector is reportedly four times the size of the official one (Youssef, A. B.). This is an issue for the state but also for consumers, whose rights are not protected and who are experiencing fraud, which undermines trust in e-trade. The rights of e-consumers and, more broadly, the rights and data of internet users must be protected more efficiently. Related to this, regulation pertaining to online payments should be strengthened as well — while growth in the use of the e-wallets throughout the region since the outbreak of the pandemic is a welcome development, allowing populations who do not own a bank account to transfer funds (see, e.g., Moslem, A.; Ghoneim, A. and Sidlo, K.), efforts to improve financial inclusion in the region should not be abandoned.

The lack of an institutional framework that would ensure coherence among numerous digitalisation-related public policies introduced at the individual country level is another major obstacle, leading to conflicts of competence, clashes between policies introduced by various governmental agencies and a general lack of consistency (Abdelkhalek, T. et al.; see also Sidlo, K. W. et al.). In Morocco, for instance, this resulted in the 'blockage of the Moroccan single window for foreign trade operations for over a decade' (Abdelkhalek, T. et al.). Related to this is the question of the continuity of the implementation of digitalisation strategy — in Jordan, the National Digital Transformation Council, which is predominantly comprised of private sector representative, was introduced in an attempt to ensure that the Jordan Digital Transformation Strategy (MoDEE Jordan, 2020) is followed (Wilson Center, 2021).

Given the rise in teleworking, it is important to introduce legislation regulating this type of work as well as to ensure worker's rights, including 'the right to disconnect' (Abdelkhalek, T. et al.).

Finally, an acute threat of digital authoritarianism is present in the region (see, e.g., Aidi, H.; Powers-Riggs, A.; Alais, O.). The blocking of websites and applications has been used by governments in the region on multiple occasions, with the most recent (2019-2021) examples, e.g., from Egypt (Freedom House), Jordan (Mahasneh I.) and Palestine (Committee to Protect Journalists) (for the impact of pandemic on the digital authoritarianism threat, see Box 1).

### **Developing infrastructure and supporting universal access to enhanced, affordable and secure networks**

Overall, when thinking about the types of networks facilitating the transition towards a digital economy, what is important is access to: (i) telecommunication networks; (ii) data centres to host digitalised services;

and (iii) hardware (computers, smartphones, among others) (Abdelkhalek, T. et al.). The question faced is of both availability and access. First and foremost, on the most basic level, access to electricity is crucial — this varies significantly throughout the region. Across the entire region as of 2019, 100 % (99.8 % in Algeria) of the urban population has access to electricity; among rural populations in Syria and Libya, this percentage is lower, if difficult to establish due to the political situation (data for Libya from 2011 puts this number at 7.9 %) (World Health Organization, 2021). What this data does not show, however, is that in Lebanon for instance, daily power cuts all over the country have been a reality even before the economic crisis entered into full swing — in the summer of 2020, state-provided electricity in Beirut was available for only two hours a day (Moussa, L. S. and Issa, L.).

Importantly, as one of the interviewees commented, you ‘should not mix up having mobile phones with digitalisation’. Indeed, in the SN countries, smartphone penetration rates are overall very high, between 132, 128 and 126 per 100 inhabitants in Israel, Morocco and Tunisia, respectively, and 77 in Jordan and 62 in Lebanon at the other end of the spectrum (against the global average of 75; ITU, 2022). However, when it comes to the proportion of households that have access to the internet, the situation is less optimistic — from 37.34 % in Jordan to 51.44 % in Tunisia, 76.02 % in Israel and 84.49 % in Lebanon (ITU, 2022). Access to fixed broadband measured as number of subscriptions per 100 inhabitants in the SN region is one of the lowest in the world (if one excludes Israel, with a proportion of 30.06), ranging from 11.29 in Tunisia to 7.31 in Palestine and 4.83 in Libya (compared to the world average of 15.2/100) (data for 2020 [2017 for Libya]; ITU, 2022). This can only partly be explained by the fact that households in the region are on average larger than those in, e.g., the EU. Satellite broadband, which can be helpful in bringing the internet to more remote areas, is somehow popular only in Morocco (ITU, 2021b; Abdelkhalek, T. et al.). This is a serious issue since mobile connections are sufficient for communication but not suitable for, e.g., e-commerce. Overall, quality of connection is not equally good within countries, especially in rural areas (Sidlo, K. W. et al., 2020).

When it comes to prices, all SN countries except Jordan and Lebanon meet the UN Broadband Commission on Sustainable Development’s 2 % affordability target of the data-only mobile broadband basket (ITU, 2021c). However, only Israel meet this target for the fixed broadband basket (in Jordan, the cost equals 12.08 % of gross national income per capita). Part of the reason for this is that in Jordan and Tunisia, excessive taxes (by 30 %) are charged in the communications sector (GSMA); however, the problem is much broader.

In terms of security, there is plenty of room for improvement here as well. For instance, according to one report, Tunisia witnessed the highest number of cyber-attacks on the African continent and the sixth highest number of computer viruses detected globally as of 2020 (Youssef, A. B.). Against this background, while it is welcome that actions listed under Flagship 7 of the Joint Communication include ‘promoting the deployment of relevant internet and mobile infrastructure’ on the regional level, the focus should however be on the provision of affordable high-speed fixed broadband connections.

### **Digital literacy, skills, and entrepreneurship**

The need to adapt education and vocational training to the requirements of digitalisation is seen as crucial by policymakers, experts (Bahsoun, R.) and private sector representatives alike<sup>39</sup>. Training courses in information technology, entrepreneurship and, most broadly, the use of digital tools are all present in the countries in question (Blom, A., Nusrat, M., and Godlin, N.), offered by local institutions, within projects from international donors and through online platforms offering courses in Arabic.

<sup>39</sup> In the broader MENA region, the lack of key digital skills was pointed out as a serious threat to development of their businesses by CEOs in the region. See Bahsoun, R..

However, the needs are bigger than what is presently being offered, and offers by the private sector can supplement but not substitute for systematic solutions that must be introduced by the governments (Blom, A., Nusrat, M., and Godlin, N.). Schools throughout the region must be given resources — human, financial and infrastructural — in order to introduce digital skills in all parts of the curriculum at all levels of education. At the same time, and in the shorter term, the digital divide that is visible along gender, educational and age lines must be addressed (Raz D.). The gender internet penetration gap in 2019 stood at 12.2 p.p. in Algeria, 11.4 p.p. in Tunisia, 8.5 p.p. in Egypt, 8.4 p.p. in Morocco and 3.4 p.p. in Palestine; worryingly, in Arab states, on average, the gap increased by 5.2 p.p. between 2013 and 2019. Equally important, attention must be paid to the illiterate segments of the society, which require specially designed programmes (Youssef, A. B.).

### **Digital services**

The pandemic highlighted the need and usefulness of being able to access certain services online (which, as pointed out by one of the interviewees, in the medium to long term has an additional advantage of potentially diminishing corruption, which in itself is a big problem in the region).

Currently, access to digital services is limited, although performance is heterogenous among the countries in the region, with Israel being the best performer (ITU, 2021a). For instance, in Jordan, approximately 10 % of all services offered by the state are digitised now (Wilson Center, 2021).

The rollout of online vaccine registration platforms was successful in, e.g., Tunisia (interview no. 12; Youssef, A. B.) and Jordan (Wilson Center, 2021). This was, among others, due to the fact that one person possessing sufficient digital skills in each household was sufficient to register the entire family. Because of this, less successful is, e.g., an online public consultation initiative conducted presently in Tunisia, which in order to be truly inclusive would require each citizen having sufficient skills and resources to access it on individual level. This highlights the risk of the introduction of digital services without proper preparation and due attention to segments of the population that continue to require traditional, face-to-face and paper-based assistance (interview no. 12).

There is a large untapped potential for the development of the e-education sector in the region (a potential danger here is the widening of the digital gap between private and public schools, should sufficient funds and attention be not directed by the governments), as well as the management of utility services, in particular of water management.

As stressed by some interviewees (no. 9 & 25), when it comes to promotion of digitalisation, it is important to be ambitious but realistic given all the challenges described above and the limited progress of the ambitious digitalisation programmes implemented thus far (for instance, in the case of Tunisia, '[o]ut of more than 72 major projects programmed under the Tunisia Digital 2020 strategy, only 5 % have been completed, 20 % are in progress and 75 % are still in the project idea phase') (Youssef, A. B.).

### **2.2.2. The EU as the privileged partner to accomplish the green transition**

When it comes to all green transition-oriented flagships (green, circular and blue economies; sustainable production and consumption; green growth and climate action; energy transition and energy security; resource efficiency, including water and waste management, and biodiversity; as well as food systems, agriculture, and rural development), the SN countries are far from mainstreaming sustainable principles into their political and socio-economic agendas (interview no. 4 & 5)<sup>40</sup> or green growth overall — and their

<sup>40</sup> See for example: Arab Republic of Egypt, 2015 (Egypt); Gouvernement du Maroc, 2021 (Morocco); or République Tunisienne, 2021 (Tunisia).

actual coordination being interrupted by technical and financial matters is still troublesome. Additionally, as highlighted by some of our interviewees, tackling the environmental and climate crisis is barely a priority for some of the countries in the region. As pointed out in the sections above, even before the pandemic, the governments struggled with high poverty, unemployment and inequality rates, and the outbreak of COVID-19 only aggravated this trend – the less 'immediate' threats related to the changing climate have not been at the top of the list<sup>41</sup>. At the same time, attitudes among young people are changing — while according to the 2008 Arab Youth Survey, only 11 % of respondents were seriously concerned by climate change, in the 2021 edition, this number increased to 56 %, with 43 % wishing their governments did more than other countries to address this issue (ASDA/A BCW, 2021a). Yet, despite the fact that ever-growing CO2 emissions reflect the historical actions undertaken predominantly by developed countries, the SN countries are now expected to pay the price for this extensive industrial policy even though they contributed to the climate crisis far less. What is more, climate and environmental endeavours are typically siloed from core economic and social policies, making their uptake in other local, regional or even national contexts (South-South cooperation) less likely (interview no. 4).

Yet, COVID-19 provided an opportunity to generate and streamline recovery-oriented actions that may improve not only the socio-economic but also the environmental status quo. Coupled with the developments of the European Green Deal — in July 2021, the EC adopted the Fit for 55 Package (Council of the European Union, 2021c) as well as a number of regulations that constitute the actual EU Climate Law (European Parliament and Council of the European Union, 2021a) — they set the foundation for green economic growth not only in the EU but also elsewhere by establishing green partnerships with the EU's allies and neighbours. Yet, the green transition will only be possible with the EU's technical and financial support under a 'Green Deal diplomacy' umbrella. This new paradigm provides a window of opportunity for the EU and its southern neighbours to capitalise on the opportunities that some of external actions around the European Green Deal and the SN around the water-energy-food nexus bring. For example, DG NEAR has already introduced actions around this nexus, also in accordance with the European Green Deal and the UfM Ministerial on Environment and Climate Change of October 2021. As such, the circular and green economy (SwitchMed programme) are high on the priority agenda together with the de-pollution of the Mediterranean and the protection of biodiversity (initiative programmed for 2023 in principle). As discovered during the interview process, a test initiative has also been launched with local authorities in the region in order to contribute to their adaptation measures. If this proves successful, it will be expanded.

Although it is too early to assess the repercussions of the European Green Deal for the southern neighbours, some externalities are more likely than others and are thus often mentioned both in the literature<sup>42</sup> and during interviews. The reduced need for fossil fuels is, for instance, a potential issue for the oil- and gas-producing countries across the SN region. These disruptive geopolitical implications of the Green Deal were identified in January 2021 by the Council of the European Union in their conclusions on climate and energy diplomacy which 'could — in the medium term — have adverse impacts on some, (...) including in the EU's broader neighbourhood' (Council of the European Union, 2021b). The exact impacts will vary depending on a number of factors such as the level of fossil fuel export dependency on the EU market or the ways and means of fossil fuel transport. Yet given the newly introduced plans towards becoming independent from Russian oil and gas, imports of these resources from the SN are likely to

<sup>41</sup> At the same time, it is important to keep things in context. Algeria and Egypt, for instance, are the two largest CO2 emitters in the SN region, the emissions of which (nearly and more than) doubled between 2000 and 2018: from 78 590 kt up to 151 670 kt for the former and from 112 860 kt to 246 260 kt for the latter; however, their emission levels are still below that of EU countries such as Germany or France. In per capita terms, only Israel and Libya were as of 2018 emitting more CO2 than the EU (7.0 and 8.8, respectively, compared to 6.4) (World Bank, 2021c).

<sup>42</sup> See for example Berahab, R. and Dadush, U. or Teevan, C., Medinilla, A. and Sergejeff, K.



increase in the short term (see Chapter 1.3). In a mid- and long-term perspective though, apart from the direct effect on these countries' incomes, indirectly, they could be hit even harder, as other countries might soon follow the decarbonisation path accelerated by the EU's bold move. At the same time, at least until 2030, the need for imported natural gas will determine the maintenance of the current transmission systems and existing infrastructure, limiting the pool of resources for investments in green energy infrastructure (i.e., energy storage) (Leonard, M. et al.).

In addition to being oriented towards the phase out of fossil fuels, the Fit for 55 package includes a draft of a long-discussed carbon policy measure, the EU Carbon Border Adjustment Mechanism (EU CBAM) (European Commission, 2021a), which would be complementary to the EU's Emission Trading Scheme (ETS). This mechanism was developed to block carbon leakage and encourage EU allies and neighbours to adhere to decarbonisation principles. CBAM certificates would be binding to importers based on the actual emissions intensity of the products imported to the EU. Even though, for example, Morocco and the EU are strong economic partners, if CBAM is adopted, Morocco might be significantly affected (Berahab, R. and Dadush, U.) due to substantial costs added to Moroccan exports, especially if CBAM is extended to all industries in the future (initially applicable to aluminium, cement, iron and steel, electricity and fertiliser). As one of our interviewees pointed out (interview no. 4), CBAM could indeed have an impact on trade among Mediterranean countries, and every effort should be made to avoid negative potential economic and social impacts in the SN as environmentally harmful energy subsidies are still in place in these countries. However, that may also act as a stimulus for taking measures to remove fossil fuel subsidies, for instance. In their opinion, climate experts and activists have called for the cost of carbon-based pollution to be factored into the price of fossil fuels for years as that would be a way to provide certainty and confidence for the private and financial sectors. But companies still need to adjust their business models, ensuring that finance is directed to the green economy, and financial institutions need to invest in carbon-free portfolios. The proposed CBAM — whether or not will be adopted — is a wake-up call signalling that carbon emission regulations and taxation will increase and that the SN needs to accelerate its own decarbonisation efforts, which until today, have been insufficient.

Other risks and trade-offs for the SN partners related to the EU Green Deal could be related to food production, biodiversity, critical raw materials, the circular economy, new technologies or finance.

At the same time, all these potentially troublesome issues stemming from the broader paradigm of the 'Green Deal diplomacy' have been carefully addressed in the Joint Communication and the EIP in which sustainability has been designated as one of the areas which still has space to scale up Euro-Mediterranean cooperation. The narrative is simple: it is possible for the EU and its neighbours to become 'champions of climate ambition' if the incentives from the Joint Communication are designed, implemented and monitored ambitiously (interview no. 4). This is particularly relevant for climate-related innovations and experiments, such as common hydrogen projects and partnerships mentioned — in the future, green hydrogen from the SN could be transported using current infrastructure (gas pipelines) without additional disruption to the natural environment, while supporting EU's decarbonisation, developing local hydrogen expertise and creating new industrial sets of products at the same time. However, the success of the Joint Communication depends on the engagement of local and regional authorities (LRAs), who are typically at the forefront of anything related to the climate crisis. Hence, the innovative territorial dimension of public policies should not only have been acknowledged, but also promoted within the framework of the Joint Communication (CPMR Intermediterranean Commission). Lastly, it is worth mentioning that an approach to food systems reinforcement could be even more ambitious. As highlighted by the Committee of the Regions' Opinion (European Committee of the Regions, 2021), this could be done through enforcement of legal obligations on strict food safety standards as well as plant and animal health and welfare in accordance with the Farm to Fork Strategy or the promotion of benefits related to agro-ecological



transition (European Commission, 2020e; although it must be noted that the majority of the SN countries already struggle to apply the EU's sanitary and phytosanitary standards, see, e.g., European Commission et al., 2021). According to our interviewees (interviews no. 4 & 5), the European Green Deal and the following European Climate Law will have significant impacts on the bloc and globally, and some of these repercussions will be negative for the EU's southern neighbours. To ensure a fair and just transition, the EU needs to work together with its Mediterranean partners to identify and anticipate any other negative externalities in advance and mitigate them accordingly, while leveraging the positive effects stemming from the new regulatory environment. Yet, it should consider the structural differences of SN countries *vis-à-vis* the EU when programming concrete incentives towards the promotion of truly green partnerships in its neighbourhood and perhaps push for intersectoral cooperation — ensuring that shifting development pathways are shared by all sectors, not just administrations in charge of the environment — instead of pursuing bilateral negotiations at the national level only (interview no. 4). At the same time, the ENP South could benefit from initiatives that support broader system thinking instead of ad hoc projects (Abdullah, H., Elgendy, K. and Knaepen, H.). While pushing this internationalisation of the European Green Deal, the EC could start by earmarking the EU development policy budget to limit the current adaptation gap keeping the incentives and capacity building mentioned in the EIP strong, i.e., phasing out environmentally harmful subsidies and incentivising sustainable options, while empowering local authorities and stakeholders to implement nationally or internationally agreed commitments and measures (interview no. 4; International Institute for Sustainable Development). In this programming phase, the EC and other financial institutions should make use of the new Team Europe-Partner countries and regions for sustainable investment across the SN — an instrument aimed at mobilising 'at scale development resources for greater impact toward a sustainable and inclusive COVID-19 recovery' (Bilal S.). Finally, this year's Conference of the Parties (COP27) will be held in Egypt (International Institute for Sustainable Development), providing a good occasion to focus on the needs of the SN in making their green transition just.

## 2.3. 'Inclusiveness': the policy potential of a new paradigm

### 2.3.1. Supporting the implementation of social reforms, including the size of the informal sector and social protection

The COVID-19 pandemic has showcased that, despite the fact that issue of social protection has been on the political agenda for a long time, not much has changed in a positive direction both in terms of the coverage and targeting of social protection policies. According to the ILO, only approximately 4 in 10 persons in the MENA region is effectively covered with a 'social protection scheme of some kind' (compared to the global average of 47 %) (ILO, 2021c). This number is even lower for children (23 %) and persons with disabilities. Among those above the retirement age, at 40.5 %, the proportion of those who receive pensions is well below the world average of 77.5 %. On top of that, just 1 in 10 unemployed persons has access to unemployment benefits (data before the outbreak of the pandemic). The situation varies from country to country; in Lebanon, only 13.9 % of the population is covered by at least one social protection benefit, while in Egypt, this number stands at 34.7 % (and 54.9 % in Israel) (International Labour Organization, 2021b)<sup>43</sup>. Throughout the duration of the COVID-19 pandemic, as one recent study shows (Krafft, C., Assaad, R. and Marouani M. A.), targeting the poorest households with assistance improved in Morocco but deteriorated in Egypt.

<sup>43</sup> No data for Syria and Palestine.

Persons in informal employment are one particular group that, as the pandemic stressed, are outside of the social protection system. The size of the informal employment sector in the region is estimated between 44.9 % in Jordan and 79.9 % in Morocco (ILO, 2018). While men and women are on average equally likely to be informally employed, refugees and migrants more often work in the informal economy. Amid the pandemic, the majority of the governments provided emergency cash transfers for informal workers (Egypt, Jordan, Morocco, Lebanon, Palestine and Tunisia), but few made the decision like Jordan to extend social protections towards them, importantly due to budgetary constraints (International Labour Organization, 2021c).

Another significant part of the problem is that spending on general subsidies has been exceeding that of social safety nets. Between 2009-2013, 9 % of the regions' GDP was spent on (mostly food and energy) subsidies (Vidican Auktor, G. and Loewe, M.). In 2012, the cost of subsidies amounted to 7 % of GDP in Morocco and 14 % in Egypt (Vidican Auktor, G. and Loewe, M). In 2015, the MENA region countries spent on average 6 % of their GDP on general subsidies but merely 0.7 % on targeted social safety nets which were 'fragmented, [having] limited coverage and (...) poorly targeted' and as a result had a limited impact on fighting poverty and inequality (World Bank Group, 2015), despite being a heavy burden to the national budgets. Reluctance to decrease those numbers was connected with the particular social contract whereby subsidies were provided by the rulers in exchange for a lack of political participation. Despite the fact that various governments did implement some limited subsidy reforms, the issue remains a contentious one.

The topic of social protection is at the heart of the Regional UN Issue Based Coalition (IBC) for Social Protection, coordinated by UNICEF and the ILO. A declaration published as a follow-up of a November 2021 Arab Ministerial Forum 2021 'The Future of Social Protection in the Arab Region: building a vision for a post COVID-19 reality' (UNICEF, 2021a) organized by the IBC<sup>44</sup> stressed the need to enhance — 'in line with national priorities, progressive realization of commitments to international agreements, conventions and charters, and within available capacities and resources' — (i) coverage (including for workers in informal employment, refugees, migrant workers and 'people on the move'; (ii) resilience; (iii) financing; and (iv) the governance and coordination of social protection systems in the Arab region (UNICEF, 2021b). The issuing of the declaration is a welcome move, although it should be noted that the needs and actions listed in it remain to a large extent the same as the problems listed in similar documents and under similar initiatives 5 (World Bank Group, 2015) or 10 years ago (World Bank, 2021g).

Under the New Agenda, the EU does have an opportunity to support the much-needed changes. Under Flagship 6 (Inclusive economies), the need to promote social protection systems is stressed and an action point in the case of Morocco and Tunisia to that effect was noted, as was the need to transition towards formal employment on a regional level. However, significant effort will need to be made to move beyond these general-level statements and move towards more tangible and actionable solutions. Technical assistance will be of crucial importance when it comes to designing resilient and tailor-made social protection schemes.

At the same time, effort will be required on the part of the SN governments on quite another dimension. Interestingly enough, at the same time, 'improving social protection schemes and equitable delivery of basic services' was seen as the most effective way to foster more inclusive economies by just 5 % of the interviewees from the SN (top choices included investments in human capital [36 %] and infrastructure [33 %]) (European Institute of the Mediterranean, 2021). One of the reasons for this might be that while the latter two allow individuals to more directly improve their livelihoods on a personal or private-sector level, there is limited trust in governments and their ability to take care of their citizens — although this varies

<sup>44</sup> In collaboration with UN-ESCWA, Policy Centre for Inclusive Growth (IPC-IG) and the socialprotection.org platform.

greatly depending on the country (and indeed the survey methodology applied, see, e.g., differences in the results between the Arab Barometer [Kayyali, A. W.] and KAS [Konrad Adenauer Stiftung, 2021]). Regaining trust and renegotiating the social contract must be seen as part of the social protection system and efforts to move towards formal economy.

### 2.3.2. Promoting inclusive economic models

#### **Social economy**

The Joint Communication pays greater attention than previous ENP strategic documents to the inclusive growth and new inclusive economic models which look beyond economic efficiency and take into consideration social and environmental aspects. The Joint Communication explicitly mentions support for the green, blue and social economies and this new focus on the social economy is particularly worth highlighting. In the document, the social economy's business models are perceived as promising in addressing 'many societal challenges', and helpful in building 'society's resilience in times of crises'<sup>45</sup>. The Joint Communication envisaged working together with the partners on supporting social and cooperative entrepreneurship. It also assumed fostering a social economy through 'innovative financial vehicles' and the 'development of adequate regulatory ecosystems'. These objectives were further operationalised under Flagship 1 of the EIP and in the European Commission's Social Economy Action Plan, which mentioned boosting access to finance for social entrepreneurs in the SN countries (as well as in the Western Balkans and Eastern Partnership) among the key Commission actions (European Commission, 2021c). However, despite these declarations, there is an impression that something more specific on financing the social economy should be done (interview no. 30). In this regard, special attention and, if needed, technical assistance to the countries that are already working on the development of their strategies and the adoption of social economy laws should be provided (Social Economy Europe). Furthermore, the proposals made by the UfM online workshop 'Social Economy and the Post-Pandemic Recovery: Challenges and Prospects' (Union for the Mediterranean, 2020b) are particularly noteworthy, as they were named a 'roadmap' to the 'Euro-Mediterranean work agenda for Social Economy' (Union for the Mediterranean, 2021d). These recommendations mentioned not only improving the access to finance that aims at supporting the development of the social economy in the region but, also, such issues as fostering social economy initiatives in innovative sectors related to the blue economy or green transition and promoting the presence of the social economy and its values and enterprise models in the education system. Last but not least, as the outcome document of the UfM Social Economy Workshop 2021 'Towards a new Social Economy agenda for a sustainable and inclusive Mediterranean' notes, establishing a working forum for the members of the UfM would contribute to advancing the creation of social economy in the Mediterranean region (Union for the Mediterranean, 2021d).

#### **Supporting employment of youth and women**

Converging analyses have warned that the social grievances that led to the Arab Uprisings have remained unaddressed 10 years later. Among other phenomena in the region, persistent high levels of inequality, youth unemployment (Ghafar, A. A., 2022), skills mismatch, low female labour force participation and a high share of informal employment are serious causes for concern which can contribute to instability. The Joint Communication pays greater attention to these issues than previous similar strategic documents and the term 'inclusive growth' has been used across the board by the EC, which has increased its initiatives and programmes aiming at supporting the employability of the youth, women and disenfranchised groups in the region. It is worth noting that the Joint Communication seeks to be consistent with other EU policy

<sup>45</sup> The Joint Communication, p. 9.

documents, such as the third EU gender action plan. Moreover, various initiatives are implemented to bring gender equality in the region, e.g. the Intergovernmental Monitoring Mechanism on Gender Equality launched by the UfM in 2020<sup>46</sup> and the first UfM progress report on gender equality which was published in March 2022<sup>47</sup>.

Although still at a very early stage, more detailed discussions have started on the possibility to put the Youth Guarantee scheme into action in the region. It is important, however, to keep in mind that this requires many further steps before it could be implemented (interview no. 30), such as building the capacities of funding and public and private employment services or reforming the vocational education and training (VET) and apprenticeship systems of the SN countries.

Despite the EU's efforts, its actions which aim at supporting youth employment may still be perceived in the region as insufficient (interview no. 12), and some unresolved, contentious topics persist, for example, the risks associated with the 'brain drain' problem<sup>48</sup>. Considering the great importance associated with the challenge of youth and women unemployment, the EU should scale-up its commitment. One exemplary initiative<sup>49</sup> is the EU-ILO METI programme (Mainstreaming Employment into Trade and Investment – METI) launched in 2020 which aims at integrating employment in trade and investment policies in the SN countries. It is worth noting that it focuses not only on the quantity but also on the quality of jobs, and it seeks to benefit in particular women, youth and employers (especially SMEs). Among the actions intended within the programme are technical training, workshops, the promotion of public-private policy dialogue and provision of reliable data and analysis (International Labour Organization, 2020). Furthermore, to promote SMEs and address the funding gap, the Joint Communication envisaged the use of new financial instruments, such as venture capital and business angels. However, it is unclear to what extent these actions could support job creation in the SN countries, given the limited size of funding. Moreover, as noted by the European Committee of the Regions, to promote job creation, particular attention could be given to the local context of the business environment, among other things (European Committee of the Regions).

### 2.3.3. Boosting the inclusiveness of public services

#### Healthcare

The COVID-19 pandemic has exposed the vulnerabilities of the health care systems in the SN countries. In many countries of the MENA region, the healthcare systems were underfinanced and ill-prepared to face this crisis (Gatti, R.V. et al.). The focus on inclusiveness and the social dimension in the Joint Communication was inspired by the willingness of the EU to help its partners mitigate the effects of the pandemic not only in macroeconomic terms but also in social terms. This may boost cooperation between the EU and its partners in sectors where working together has thus far been under-exploited, such as in the healthcare sector. In this context, the Joint Communication clearly referred to the need of supporting the

<sup>46</sup> See more: Union for the Mediterranean, 2021a.

<sup>47</sup> See more: Union for the Mediterranean, 2022.

<sup>48</sup> Although these risks are explicitly mentioned in the Joint Communication and will possibly be addressed through the Talent Partnerships, some experts pointed out that this initiative does not do enough to tackle concerns about the 'brain drain' problem; Dempster, H. and Clemens, M. For more on how the Talent Partnership can be effective, see also Section 2.4.1 of this study.

<sup>49</sup> In this context, it is also worth mentioning the CLUSTER project, coordinated by IEMed. This project focuses on the problems of social exclusion and poverty, and more specifically among youth and women in the countries on both sides of the Mediterranean Sea. The project highlights the importance of the social economy, the technical and vocational education and training institutions and the private sector in employment policies. See more at <https://www.enicbcmmed.eu/cluster-launches-profiling-activities-analyse-needs-young-people-and-women-entering-labour-market>.

preparedness of healthcare systems. While mitigating the effects of the pandemic in its neighbourhood, the EU will mobilise EFSD+ and seek renewed cooperation with international and European financial institutions. It also reiterated the EU's continuous commitment to the COVAX facility and expressed its readiness to set up an EU vaccine-sharing mechanism which should pay special attention to the SN (and the other neighbouring regions).

Interdependency in the global health area highlighted by the COVID-19 pandemic brought together the Mediterranean partners and boosted their cooperation<sup>50</sup>. The support provided to fight the pandemic in the region was perceived by some as effective<sup>51</sup> or as a means of instilling a sense of trust between the two parties (interview no. 16). The COVAX facility provided the SN countries with over 102 million doses of the vaccine<sup>52</sup>, and Team Europe is one of its principal donors, while its overall contribution to the programme amounted over EUR 3.6 billion<sup>53</sup>. Regardless of these efforts, the vaccination campaign in the SN moves at varying paces, while in some countries the rate of fully vaccinated people has reached relatively high levels (e.g., 67 % in Israel, 64 % in Morocco and 54 % in Tunisia) and in others it was very low (e.g., 15 % in Libya, 13 % in Algeria and 5 % in Syria)<sup>54</sup>. In this context, the EU faced criticism over blocking the suspension of patent rights of the COVID-19 vaccines, mostly from the part of developing countries<sup>55</sup>, as some of them are willing to produce the vaccines locally (among the SN countries, COVID-19 vaccines are produced in Algeria, Egypt and Morocco) to speed up domestic and regional vaccination campaigns<sup>56</sup>. Supporting the local production capacity of COVID-19 vaccines in the SN countries could, therefore, be perceived as an important step towards mitigating the imbalanced distribution of vaccines across the Mediterranean<sup>57</sup>. Furthermore, the EU could consider increasing its support for improving the situation of public services in the SN countries, and especially health care sector and social protection measures, through connecting it with debt forgiving or restructuring initiatives (Claes, T. and M. Furness, M.).

## Education

Population growth is a huge challenge and along with the frustration caused by the lack of employment opportunities among young people in the SN countries, there is an urgency to invest more in education (interview 38). The recent necessity of online learning brought to the forefront new inequalities, which may aggravate the existing gap in quality of education between the high income and less developed countries (ESCWA, 2021b). In addition, skills mismatch is an important issue in the region as it is difficult for employers

<sup>50</sup> For more information on the EU's initiatives in response to the COVID-19 crisis in the SN, such as the EU Initiative for Health Security, a regional emergency response facility to COVID-19 within the EU Emergency Trust Fund for Africa - North Africa window, or the EU Regional Trust Fund in Response to the Syrian crisis, see: [https://ec.europa.eu/neighbourhood-enlargement/eu-response-coronavirus-pandemic\\_pl](https://ec.europa.eu/neighbourhood-enlargement/eu-response-coronavirus-pandemic_pl)

<sup>51</sup> The results of the 2020 OPEN Neighbourhood opinion polls indicated that in the opinion of the majority of respondents in the Maghreb (66 %) and Mashrek (63 %) regions, the EU's support to their countries during the pandemic was 'very or fairly effective' (EU Neighbours South, 2020a).

<sup>52</sup> Apart from Israel; according to data available on 14 February 2022 on the UNICEF COVID-19 Vaccine Market Dashboard: <https://www.unicef.org/supply/covid-19-vaccine-market-dashboard>

<sup>53</sup> As of 28 January 2022; author's own calculations based on data derived from: [Gavi COVAX AMC Donors Table Jan 28 2022.xlsx](#).

<sup>54</sup> As of 14 February 2022; data derived from: <https://coronavirus.jhu.edu/vaccines/international>

<sup>55</sup> Among the SN countries endorsing a temporary waiver of the COVID-19-related medical products part of the Trade-Related Aspects of Intellectual Property Rights (TRIPS) agreement are the members of the African group at the WTO: Egypt, Morocco and Tunisia (World Trade Organization, 2021).

<sup>56</sup> See more on the EU's position on TRIPS and COVID-19 vaccines at the WTO: Atanasova D.

<sup>57</sup> A step forward has been taken in the margins of the 6th EU-AU summit, which was held on 17-18 February 2022 in Brussels. Six African states, including SN states such as Egypt and Tunisia, would receive the COVID-19 mRNA technology transfer. In addition, several other supporting measures dedicated to the healthcare sectors and vaccination campaign in Africa were announced during the summit. See European Council, 2022.



to find employees with the relevant skills and experience. According to the preliminary findings of a 2021 UNESCO study, some countries of the Southern Mediterranean (namely, Algeria, Jordan, Lebanon, Palestine and Tunisia) are 'likely to face continuing problems of imbalance and mismatch' and 'there is a clear need for policy interventions to address concerns on both the demand and supply sides of skills development' (UNESCO, 2021). The Joint Communication recognises the challenge of skills mismatches and attaches greater importance to education in comparison to the ENP review, as the topic stands now as a component of one of the two action points under the 'good governance and the rule of law' key policy area, and features as one of the four main areas supported under Flagship 1 of the EIP.

In the opinion of EuroMeSCo Euromed Survey respondents, '[f]ostering inclusive economies can be best achieved through a combination of reforms in the field of education, vocational training and re-skilling, with the development of vital infrastructures (such as energy, transport, digital, health and housing)' (European Institute of the Mediterranean, 2021). Furthermore, according to the survey's results, the focus on supporting education and its role in boosting inclusiveness in the Southern Mediterranean countries is regarded as a crucial element in both parties' mutual relations. The EU's support to civil society, diversity, culture and education was perceived by the respondents on both shores of the Mediterranean as the EU's most successful action in the region, whereas Horizon 2020<sup>58</sup> and Erasmus+<sup>59</sup> were the programmes that the respondents mentioned to exemplify the EU's successful engagement<sup>60</sup> (importantly, cooperation on Horizon Europe and, more broadly, 'digital, research and innovation' is one of few areas where Israel participates closely as well).

According to some experts interviewed for this study, there is high demand for expanding mobility programmes in higher education (interview 12) and VET<sup>61</sup> (interview 30); some of them also noted the necessity to boost efforts to increase awareness of the existing possibilities in this area (interview 37). In its 2021 study, the Mediterranean Universities Union (UNIMED) recommended, among other things, the enlargement of the Erasmus+ programme (especially the Erasmus+ traineeship initiative which is currently available only at the EU level) to the SN countries and enhancement of the thematic South-South cooperation. It also identified virtual exchanges as a complement to physical mobility, a cost-effective tool which can provide a 'highly inclusive opportunity to access international and intercultural learning and soft skills development' — especially at a time of limited possibilities during the pandemic (UNIMED). In general, the internationalisation of post-secondary education is considered as one of the priority policy areas in the Mediterranean region, and here, regional cooperation is key to developing joint initiatives (Hoogeveen, J. G. and Lopez-Acevedo, G.; Union for the Mediterranean, 2020a) in the Mediterranean..

All in all, poor quality of education (especially at the primary and secondary level) remains an important obstacle to more inclusive economic growth in the region, and the EU can play an important role in

<sup>58</sup> As of December 2021, Israel has an already applicable association agreement with the EU on Horizon Europe in place, and the negotiations on such association were concluded with Tunisia, although its signing is yet to be seen due to the political situation following dissolution of the Tunisian Parliament in July 2021 by Tunisia President Kais Saied. The negotiations with Morocco have not concluded yet (European Commission, 2021k).

<sup>59</sup> As of 2020, within the Erasmus+ programme, Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia were included as partner countries. Furthermore, the universities from this region participated in the Erasmus Mundus Joint Master's Degrees programme. See more: European Commission, EU-Southern Mediterranean cooperation through Erasmus+.

<sup>60</sup> The EU's education programmes were also named as the most known programmes among the respondents from the EU's SN according to the 2020 OPEN Neighbourhood opinion polls (EU Neighbours South 2020a).

<sup>61</sup> The Joint Communication mentions the greater engagement of the partners from the Southern Neighbourhood in such initiatives as the Centres of Vocational Excellence, but here the talks are still at a very early stage (interview 30).



improving it through supporting efforts in this area within the UfM framework and comprehensive reform programmes together with other international donors (Dabrowski, M. and Domínguez-Jiménez, M.).

### 2.3.4. Unaddressed social grievances

Level of satisfaction with the government's performance varies greatly across the region. According to the Arab Barometer, level of satisfaction ranges from 70 % in Morocco to 52 % in Algeria, 19 % in Tunisia and 4 % in Lebanon (Arab Barometer)<sup>62</sup>. Concerning trust in government, it is fairly low in Morocco at 48 %, although it is decisively higher than in Tunisia or Lebanon (15 % and 4 % respectively) (see also Section 1.2.4).

Moreover, lack of judicial independence, transparency and freedom of speech remain issues that have not been addressed in a systematic way since the wave of Arab Uprisings in 2011. Corruption is a critical problem (see Section 1.2.4). In fact, the proportion of those who believe that the extent of corruption in state institutions in their country is medium to high increased from 78 % in 2010 to 84 % in 2019 (Arab Barometer). In 2021, 89 % of the Lebanese and Tunisians were of this opinion, along with 86 % of Libyans, 78 % of Algerians, 74 % of Jordanians and 61 % of Moroccans (Néfissa, S. B.). At the same time, Moroccans are the most content with their government's efforts to crack down on corruption; 72 % of Moroccans who believed in widespread corruption were of this opinion. In contrast, only 12 % of the Lebanese and 34 % of Tunisians believed the same. The need for *wasta* (connections) to secure a job is a common belief, showcasing how widespread corruption is a significant barrier to reducing inequalities, one of the key factors behind the emergence of the popular uprisings in the region in 2011 as well as in 2018-2020. Wealth accumulation by elites and intra-state inequalities are a particularly visible problem in Lebanon, but are an issue everywhere in the SN.

Support for the development of 'effective, independent and accountable justice and prosecutorial systems' (Flagship 2 of the New Agenda) is therefore very much welcome, as is the planned help in the 'development and implementation of public administration reform (PAR) initiatives'.

Importantly, for the EU to effectively promote the rule of law and principles of good governance in its neighbourhood, it must ensure their reinforcement among its own MS (see also discussion on conditionality in Section 2.1.3). As confirmed by interviewees (e.g., interviews no. 12 & 40), the issue of the legitimacy of EU's 'preaching' in this regard has been raised on numerous occasions by policymakers from the SN.

## 2.4. No solution in sight to address major Euro-Mediterranean policy bottlenecks

### 2.4.1. Migration

In relation to migration and mobility, the Joint Communication for the Mediterranean refers primarily to the New Pact on Migration and Asylum (Council of the European Union, 2021a) and in fact does not put forward any new proposals relating to cooperation with Mediterranean partner countries. In this context, it mentions 'comprehensive, tailor-made, balanced and mutually beneficial partnerships' without providing a coherent and convincing formula on how to achieve them. Action points listed in the document are hardly to be seen as a ready to-do list as they involve one-way exchanges and cannot guarantee the much-needed ownership and leadership on the side of Mediterranean partners.

<sup>62</sup> Needless to say, receiving answers to this type of sensitive question is challenging, especially in countries with more repressive political systems; thus, all answers need to be approached with a degree of carefulness.

The reasons for such state of play are manifold. The New Pact on Migration and Asylum (European Commission, 2020a), proposed by the EC in September 2020, puts externalisation — a concept which has been key to European policies on migration since 1990 — in its centre. The focus of the package is thus clearly internal. It further determines the approach to the EU's international cooperation, introducing in it a strong element of coercion. The external dimension of the EU's policy on asylum and migration remains instrumental to ensure the effectiveness of its internal aims (Martín, I.). In this context, the Pact does not differ much from its predecessor, the 2015 European Agenda on Migration (European Commission, 2015a).

The key question posed by the authors of the Pact is thus how the EU can make other countries do what is in the EU's interest (Spijkerboer), while maintaining the 'mutually beneficial partnerships' discourse used in the document. Previously, the intended practice has been to give third countries 'more' in exchange for obtaining 'more' from them, and, most frequently, visa facilitation and liberalisation is intended to be exchanged for readmission agreements. The principle, known as 'more for more' (or, in reverse, 'less for less'), proved to be working for the EU's Eastern Neighbourhood, at least to some extent, but has been far from efficient in Euro-Mediterranean cooperation. While the EC maintains its mandate to negotiate readmission agreements with countries such as Tunisia and Morocco and from time to time notes a rather symbolic progress in talks, negotiations with Algeria, for example, has not begun as the country refuses to take its seat at the table. The most important brake on conversations on readmission with SN countries seems to be the lack of a sufficiently attractive 'reward' for cooperation from the EU side. While visa liberalisation programmes could be such an 'reward', the EU has never presented them as an option.

At the same time, when considering policies that could contribute to improved cooperation on returns, SN countries refer primarily to bilateral visa facilitation mechanisms (IEMed, forthcoming). Visas are highly important for the citizens of the Mediterranean partner countries: according to the EU Neighbours South survey conducted in 2020, concerning citizens of the Maghreb countries, the information most frequently searched for in relation to the EU was visa information (35 % respondents) (EU Neighbours South, 2020b).

For many partner countries, bilateral channels of cooperation have proved to be more effective and less time consuming than negotiating with the EU as a whole. Their reluctance to discuss readmission might also have its source in the fact that their economies are to a significant extent dependent on remittances sent back home by those living and working abroad, be it regularly or not (Sundberg Diez, O., Trauner, F. and De Somer, M.). Even during the COVID-19 pandemic, these transfers have been characterised by a high degree of resilience, as previously discussed in Box 1. Putting readmission in place can also be costly for SN countries due to the reforms — both structural and institutional — needed to implement the formalised agreements (Sundberg Diez, O., Trauner, F. and De Somer, M.).

On the other end, not all EU MS are keen on having EU readmission agreements in place (interview no. 44). More powerful countries and those who have stronger ties with relevant third countries tend to choose bilateral channels as well. By doing so, they put ensuring the returns' effectiveness ahead of the effort- and time-consuming joint EU-wide initiatives.

The EU's devotion to readmission agreements, commonly believed to lead to a higher rate of returns of irregular migrants, might surprise because the evidence shows that they have less impact than widely assumed, often leading only to a temporary increase in the return rates (Stutz, P. and Trauner, F., 2021). Moreover, in its 2018 impact assessment accompanying the proposal amending the regulation on the Visa Code, the EC — the main author and owner of the New Pact on Migration and Asylum — stated that 'apart from anecdotal experience in the EU (...) there is no hard evidence on how visa leverage can translate into better cooperation of third countries on readmission' (European Commission, 2018).

The ‘development of legal pathways to Europe’ mentioned in the Agenda is supposed to be realised primarily through the introduction of Talent Partnerships. This initiative, launched in June 2021 under the New Pact on Migration and Asylum, aims at providing ‘a comprehensive policy framework, as well as funding support to boost mutually beneficial international mobility based on better matching of labour market needs and skills between the EU and partner countries’ (European Commission, n/d). The funding for this initiative is channelled through the NDICI – Global Europe instrument<sup>63</sup>, 10 % of which is earmarked for migration and forced displacement (for information on financing mechanisms, please see Section 2.1.4).

For Talent Partnerships to be effective in the future, they should meet certain baseline criteria. The most fundamental one is avoiding negative conditionality as it might irritate partners and further weaken their willingness to cooperate, which is the starting point for any action (Rasche, L.). Second, Talent Partnerships should have clear and realistic objectives — being overambitious and promising too much for each side is a real risk, especially considering that the EC has no power to propose legal instruments that have a direct impact on the number of workers to be admitted into EU MS labour markets. Furthermore, Talent Partnerships could be more sector-specific, rather than skills-specific (Schneider, J.). Last but not least, while developing Talent Partnerships, the risk of brain drain from the SN region and its implications should be adequately assessed and addressed (see: Section 2.3).

According to the Euromed Migration survey<sup>64</sup> (IEMed, forthcoming 2022) visa facilitation as well as professional and university training schemes were among the top suggestions with regards to developing further legal mobility pathways to the EU. Yet, EU MS might not be that willing to facilitate the travel of third country nationals and open up access to their labour markets to degrees which would be satisfactory for partner countries, especially in the context of the post-COVID-19 recovery and related labour market protection. Despite persisting skills shortages and labour gaps in certain sectors, opening up labour markets to migrants from the SN might also be challenging for those EU MS where populism is on the rise.

In relation to cooperation in the area of international protection, the Joint Communication does not open any new pathways. By highlighting and providing for the broader application of border procedures, the New Pact on Migration and Asylum prioritises the ‘protection of the EU borders rather than (...) of the people’ (Rouland, B.). To date, the Regional Development and Protection Programme for North Africa (RDPP), managed by a Consortium of EU MS and led by Italy, has proved to work well in the case of Egypt while it has been progressing in Morocco; cooperation with Algeria and Tunisia has been challenging (interview no. 43).

Although, rhetorically, the above-mentioned documents place a strong emphasis on co-ownership, in fact, the involvement of EU MS and partner countries in the implementation of the proposed measures is highly questionable. In addition to the above-discussed obstacles, third countries are not even consulted on related action plans (interview no. 43). At the European Council meeting held on 21 and 22 October 2021, eight action plans for countries of origin and transit were presented (European Council, 2021), ‘some of

<sup>63</sup> NDICI plays a more important role in migration management also due to the newly introduced form of conditionality, namely the ‘flexible indicative approach’. According to Article 8 Point 10 of Regulation 2021/947 — Neighbourhood, Development and International Cooperation Instrument, ‘A more coordinated, holistic and structured approach to migration shall be pursued with partners, taking into account the importance of addressing the root causes of irregular migration and forced displacement. It shall maximise synergies and build comprehensive partnerships, while paying specific attention to countries of origin and transit. That approach shall combine all appropriate tools and the necessary leverage through a flexible incitative approach [...]’ ([https://www.eumonitor.eu/9353000/1/j4nvk6yhcbpeywk\\_j9vvik7m1c3gyxp/vljn7p7icqyt](https://www.eumonitor.eu/9353000/1/j4nvk6yhcbpeywk_j9vvik7m1c3gyxp/vljn7p7icqyt)).

<sup>64</sup> The online survey ‘Towards sustainable and mutually beneficial migration partnerships in the South Mediterranean’ was conducted by IEMed and ICMPD between 15 June and 17 July 2021; 139 government, think tank, civil society and academia representatives from Maghreb (59 %) and Mashrek (37 %) countries and Israel (4 %) took part in the survey.

them for the Southern Neighbourhood' (interview no. 43). These documents have not been made public since they have not been consulted with partner countries and as such are rather the fruit of coordination between the EC and EU MS<sup>65</sup>. This approach might affect third states' willingness to take part in the implementation of concrete activities under such plans and thus limit their impact.

At the same time, the Joint Communication points at 'exploring further' the cooperation at the regional and multilateral level, mainly under the Joint Valetta Action Plan (JVAP)<sup>66</sup>, and the Khartoum<sup>67</sup> and Rabat Processes<sup>68</sup>. The meetings organised within the framework of the latter two are rather highly valued by its participants since they provide space for frank conversations and a platform for the exchange of views and experiences, with Morocco and Egypt being particularly active (interview no. 43). These Regional Consultative Processes (RCPs) are still not seen by the EU as relevant platforms for discussing issues such as action plans directed to partner countries and thus as a means of enhancing their buy-in and co-ownership.

According to the EU Neighbours South survey, migration (in general) is perceived as a critical area in which the EU should have a greater role to play in partner countries (70 % respondents from Maghreb and 54 % respondents from Mashrek countries) (European Council, 2021). According to the Euromed Migration survey (European Council, 2021), building economic opportunities and addressing the root causes of irregular migration is the most important policy area of the SN countries, followed by countering smuggling and trafficking in human beings. At the same time, most respondents taking part in this survey assessed the EU's contribution towards tackling outward irregular migrations as insufficient.

In this context, it is worth underlining that the EU's approach based on conditionality in migration and mobility issues does not seem to work in the case of irregular migration and can also undermine its ambition of establishing 'mutually beneficial partnerships'. Further pursuing of such an approach *vis-à-vis* Mediterranean partners might eventually weaken the EU's position as a relevant actor in the region in the context of the emerging players such as China, Russia or the Gulf countries (Rasche, L.) (see also Section 1.2.2). In addition, the EU's decision to activate the Temporary Protection Directive for Ukrainians in connection with the war in Ukraine has caused controversy among the SN partners. Among other things, the EU has been accused of applying double standards, which has further damaged its image in the SN, as discussed in Section 1.3.

## 2.4.2. Trade

Trade between the EU and the SN countries, with the exception of Syria and Libya, is governed by the trade chapters of Association Agreements that entered into force between 1997 and 2006 (henceforth, free trade agreements, FTAs)<sup>69</sup> as well as by subsequent agricultural protocols concluded with Israel, Egypt, Morocco, Jordan and Palestine.

For these countries (except Palestine), the EU is collectively the main trade partner. However, for the EU, the SN represents only 4 % of its external trade (even though it remains an important source of energy and agri-food imports, as well as an important market for exports [European Commission et al.]). This negative trade balance for goods is a concern expressed by the partner countries (European Commission et al.; Van der Loo).

<sup>65</sup> For more about the consultations with stakeholders, see the disclaimer at the beginning of the Study and Section 1.1.

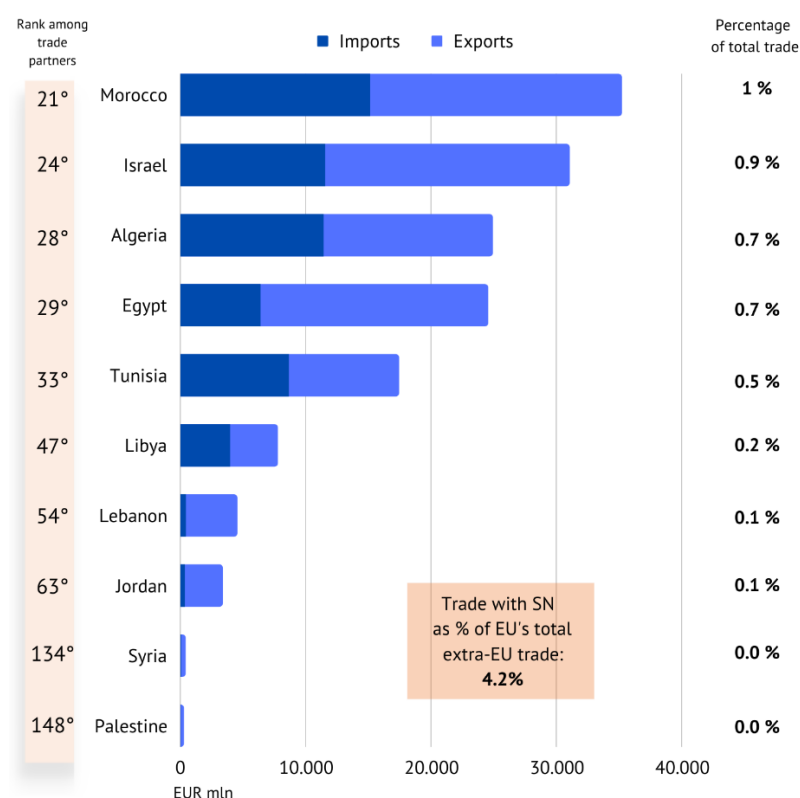
<sup>66</sup> The full text of the Plan can be accessed on: [https://www.consilium.europa.eu/media/21839/action\\_plan\\_en.pdf](https://www.consilium.europa.eu/media/21839/action_plan_en.pdf)

<sup>67</sup> For more information, please consult: <https://www.khartoumprocess.net/>

<sup>68</sup> For more information, please consult: <https://www.rabat-process.org/en/about>

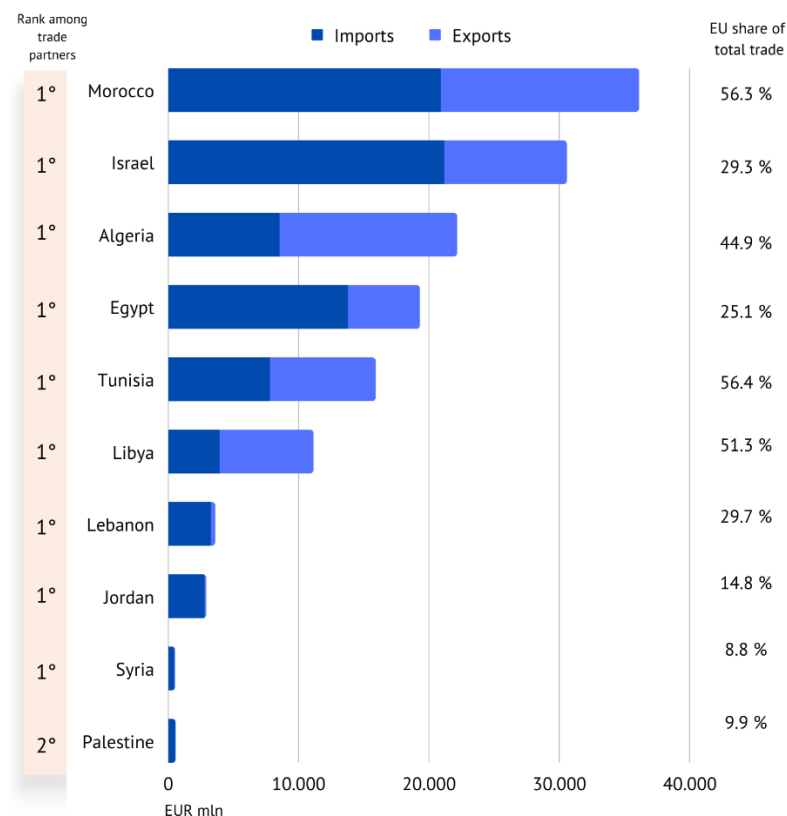
<sup>69</sup> In the case of Palestine, an Interim Association Agreement.

**Figure 3. Importance of SN countries as trade partners for the EU (2020)**



Source: Own elaboration based on data from <https://ec.europa.eu/trade/policy/countries-and-regions/statistics/>

**Figure 4. Importance of EU as a trade partner for the SN countries (2020)**



Source: Own elaboration based on data from EC <https://ec.europa.eu/trade/policy/countries-and-regions/statistics/>

The evaluation of the FTAs between the EU and Algeria, Egypt, Jordan, Lebanon, Morocco and Tunisia found that, overall, their performance was mostly in line with the objectives that were set for them

(European Commission et al.). Their impact on trade, GDP and welfare have been small, but positive, and the partner countries benefitted proportionally more than the EU. They also helped to achieve the broader goals of the ENP and supported initiatives within the Euro-Mediterranean region. At the same time, the enforcement and implementation of the FTAs varied from country to country, with some partners not following the pre-agreed rules<sup>70</sup>. Moreover, with time and changes in the political and economic environment, they became less relevant since they 'do not address the "newer" challenges in international trade' (e.g., services, FDI, nontariff barriers) (European Commission et al., 2021). Overall, the prevailing opinion on the FTAs in the partner countries has been rather negative, even though in particular those in Morocco and Tunisia acknowledged they helped to increase trade exchange with the EU. Some of the main criticisms were connected to difficulties meeting strict EU standards and the lack of investment flowing into the partner countries (European Commission et al., 2021). While some of the stakeholders conceded that an unsupportive business climate and internal bureaucracy were to be blamed for this as well, the prevailing mood was that of criticism of the EU side.

In 2011, the EU adopted negotiating directives regarding concluding Deep Comprehensive Trade Agreements (DCFTAs) with Egypt, Jordan, Morocco and Tunisia. The objective of the DCFTAs was not only to further liberalise trade in goods, but also trade in services as well as other trade-related areas such as public procurement, with the end goal of partial integration of the legislation of the partner countries with that of the EU. However, this was met with significant resistance both among the public and private sectors in the partner countries. Eventually, negotiations were launched only with Tunisia and Morocco (in 2015 and 2013), but they remain stalled (European Commission - Southern Neighbourhood; Van der Loo).

While there appears to be no appetite on the side of the partner countries to enter into new agreements, modernisation of the existing ones is a possibility (interviews no. 8 & 31) — as indeed stressed in the Trade Policy Review.

Moreover, during the 11<sup>th</sup> Union for the Mediterranean (UfM) Trade Ministers Conference that took place in November 2020, a joint statement was published to the effect that 'the trade provisions of some of the (FTAs) should be modernised to enhance integration with the EU market, through mutual market access opportunities and alignment of standards, and to extend their scope by for example strengthening environment-related provisions and considering a dedicated chapter on trade and sustainable development, as well as to deepen the commitments on key rules governing trade policy' (Co-Presidency of the Union for the Mediterranean [UfM], 2020). However, the often-limited contribution from SN countries in the preparation of these documents within the UfM (interview no. 9) puts under question the extent to which the abovementioned joint statement reflects the actual views of the SN governments.

The modernisation and harmonisation of trade and investment laws and regulations was also supported as a means to expand and/or diversify Euro-Mediterranean trade and investment by 93 % of businesses surveyed within the EBSOMED project (CEEBA, ASCAME, BUSINESSMED). Additionally, a '[p]act for the modernization of trade and investment between the European Union (EU) and the Kingdom of Morocco' was adopted by Business Europe, the Moroccan Employers' Association and EuroCham Morocco in September 2021 (Alliance of Mediterranean News Agencies).

This is in line with what the Joint Communication proposes. In particular, liberalisation of trade in services (where partner countries have diverging views, with, e.g., Morocco being open to the process but Tunisia not necessarily so [interview no. 31]) as well as investment are crucial, covering issues such as market

<sup>70</sup> Most recently, the EU requested consultations with WTO following the introduction of compulsory import registration rules by Egypt (European Commission, 2022a).



access. Further liberalisation in agriculture, beyond the already existing protocols, will be challenging as well.

A difficulty will undoubtedly lie, as in the case of the DCFTAs, in the issue of granting temporary movement rights for business purposes — a ‘key demand’ from both the Tunisian and Moroccan sides under the DCFTA negotiations which they wished to negotiate alongside talks on the Visa Facilitation Agreement that the EU remains unwilling to grant (Van der Loo – as noted by the author and confirmed by some of the interviewees [no. 31 & 42], this is mostly due to opposition from the MS). Indeed, the free movement of businesspeople was listed among the main obstacles to increasing European investment in the Mediterranean in a recent survey of over 56 000 businesses from the Euro-Mediterranean region, alongside lack of reliable verified information, red tape and lack of professional investment promotion (96 % each) (unconducive business climate was not one of the options available) (CEEBA, ASCAME, BUSINESSMED; interview no. 21).

Indeed, as pointed out by some interviewees (interview no. 31), modernisation is a challenging route that despite official statements might not be viable in the near future. Should that be the case, attempts to revive the existing FTAs might be made. As suggested in the Trade Policy Review, stand-alone investment agreements might be considered as an option.

At the same time, for the EU, as stressed in the Joint Communication, what is crucial is ‘a renewed commitment to improving the business climate (...) in order to build the trust of local and international private sector operators, attract investors and increase trade’. Thus far, the EIP does not mention any particular action points pertaining to this crucial task. While assistance in strengthening interconnectivity is very important (Flagship 5), in particular, in view of the promotion of synergies with the African Continental Free Trade Area (AfCFTA) — as stressed by an interviewee (interview no. 31), infrastructure is a priority for some of the partner countries as well as the recently (December 2021) launched Global Gateway (see more in Section 2.1.4) — this will be challenging in light of regional tensions and conflicts of a political nature. An additional challenge might be offering an infrastructure development model that is sustainable and environmentally friendly.

Concrete actions geared at improvement of the business climate should be developed at the later stages of the preparation of action points under the EIP. Having full buy-in from the local governments will be crucial here, and other actors such as the private sector and civil society should be engaged in negotiating concrete actions and holding the local policymakers accountable.

Importantly, those, as well as any other actions to be included in the EIP, should be broadly negotiated beyond talks with just the governments, going beyond the stakeholders consulted prior to preparation of the EIP (whose list was limited according to the interviews and focused exclusively on national governments), but including national parliaments, representatives of LRAs, the private sector, civil society, financial institutions and ‘other relevant actors’ as stressed in the Trade Policy Review (interviews no. 12, 31 & 40).

Without the improvement of the business climate, the much-talked about reshoring of production to the SN, i.e., moving some of the EU’s production to the SN countries — and indeed, more broadly, better integration of the SN in global supply chains — is very unlikely to happen (as stressed by multiple interviewees). Conversations at the political level focus on the benefits such change would bring both to the countries in the region and to the EU. The latter is keen on diversifying and thus strengthening the resilience of its supply chains following the disruptions amid the COVID-19 pandemic. More broadly, reshoring some production sites to its closest neighbourhood would directly serve the rationale of strategic autonomy, which is defined in a study released by the European Parliament ‘as the ability to act

autonomously, to rely on one's own resources in key strategic areas and to cooperate with partners whenever needed' (Anghel, S. et al.).

However, unlike in the case of state-owned enterprises, a model popular, e.g., in China, the EU's private sector makes its own decisions based on business calculations. The guarantees envisaged under the EFSD+, as well as the supportive role of the EIB, EBRD and other financial institutions, are indeed of great importance for mitigating the risks for potential investors. More broadly, the provision of technical assistance and encouraging partner countries to utilise the tools already available, such as the Euromed trade helpdesk, will provide much needed support as well. However, it cannot be stressed enough that all these actions and instruments will not be sufficient should reforms geared at strengthening the judiciary system, eliminating red tape and enforcing existing legal obligations not be implemented.

## 2.5. Peace and security: the 'weak link' of the New Agenda

### 2.5.1. The EU and the conflicts in its Southern Neighbourhood

The idea of the Joint Communication (on the SN) came after the Communication of the European Commission on the Western Balkans, published in October 2020 proposing an EIP for the Western Balkans (European Commission, 2020b), and the Joint Communication on the EaP of March 2020 (which was followed by a Joint Staff working document presented in July 2021, which included an annex containing an EIP for the EaP). However, the EEAS proposed to expand the scope of the former (interviews no. 27&42) beyond the investment plan itself and to include other issues, such as security. Although the title of the Joint Communication suggests that the 'New Agenda' is indeed a comprehensive one, it still has a strong European Commission footprint and its third section on peace and security is rather weak. Some regret that this was a missed opportunity to articulate a strategic and geopolitical vision of the Mediterranean (interview no. 16) and make connections with other important debates such as the strategic autonomy of the EU.

Concerning peace and security, the Joint Communication mainly enumerates different initiatives of the EU and presents the track record of the EU under a rather positive light, describing the EU as a 'security provider' and a 'trusted partner (...) uniquely placed to bring together conflicting parties' that has been called by 'many southern partners (...) for increased engagement'. There are some reasons to be slightly less positive about the track record of the EU in this field, including in relation to two specific initiatives mentioned in the New Agenda. To illustrate its support to sub-regional cooperation, the Joint Communication reads that 'In the Eastern Mediterranean, the EU will support peaceful dialogue based on international law, including through a multilateral conference that could address issues on which multilateral solutions are needed', echoing thereby a task the European Council had given to the HR/VP in its October 2020 conclusions (European Council, 2020). The Joint Communication also makes explicit reference to the 'recent normalisation of relations between Israel and a number of Arab countries' and expressed its readiness to explore trilateral cooperation initiatives in the light of these developments. However, no tangible progress has been made in realising these two opportunities. The tensions in the region and the pre-conditions of some countries before engaging in this kind of dialogue have made it impossible for the EU to move ahead with the idea of the multilateral conference (interviews no. 19 & 29). When it comes to exploring the potential to reap the benefits of the normalisation process between Israel and Arab countries, it is worth observing that the Council conclusions following the publication of the Joint Communication did not echo this reference to the normalisation process<sup>71</sup> and that thus far, the EU has not taken any initiative to position itself in this process, although the EU Special Representative for the Middle

<sup>71</sup> This was 'duly noted by Israel' (interview no. 71).

East Peace Process is actively in contact with a number of countries in the region to explore possible opportunities.

One of the underlying arguments of this study is that, while the European Investment Plan and the focus on socio-economic development are to be welcomed, this is not enough. A comprehensive approach including a more decisive role of the EU as a security provider in its SN is more than ever a necessity, if not for other reasons, at least to serve its own interests. Contributing to solving conflicts in its neighbourhood is likely to have a much bigger impact on the socio-economic development of the region — and therefore on EU stability — than EU investment. Stabilising Libya in particular is key to the EU's interests. In a recent report (Economic and Social Commission for Western Asia [ESCWA], 2021a), the UN Economic and Social Commission for Western Asia describes the dividends of peace in Libya for the whole region, and in particular for countries such as Egypt and Tunisia. A combined effect of remittances, trade, job creation and labour migration would result in important benefits for those countries. Before the revolution, an estimated range of 1.5 million to 2.5 million foreign workers were living in Libya and in 2012, Egypt and Tunisia registered USD 3 billion in remittances from Libya (interview no. 1). According to this report, peace in Libya could, for instance, reduce unemployment by about 10 % in Egypt. Therefore, complementarily with the EU's direct contribution to the socio-economic development of its SN partners, the EU should also engage with Egypt, Tunisia and Algeria to determine how Libya's neighbours could best take advantage of Libya's reconstruction and development.

The debate on strategic autonomy, which is likely to gain further traction under the French Presidency of the Council of the European Union, is an opportunity to develop a robust strategic plan for the EU's action in its neighbourhood, based on a more realist approach. The MENA dimension of this debate has not yet blossomed. There has not been any discussion yet, for instance, in the Maghreb Mashrek Working Group of the Council or in any other Council formation on this (interview 27). Applied to its SN, the strategic autonomy debate is relevant for at least two reasons. The first reason is that, to some extent, the neighbourhood countries can be considered a cornerstone of the EU's ambition to alleviate its trade and energy dependency on China and Russia, respectively (for the latest developments in the context of the Russian invasion of Ukraine, see Section 1.3.3). The concept of nearshoring has quickly become an important paradigm in DG Trade and DG NEAR, despite serious doubts regarding its operational nature in the current circumstances, as described above (see Section 2.4.2). Likewise, the SN is a key part of the energy equation for the EU, not only because Libya and Algeria offer important gas reserves but also because the SN can be a strategic source of renewable energy exports to the EU. According to one interviewee, the UfM could be an acceptable forum for a strategic partnership to emerge, whereby the EU would invest massively in renewable energies in its SN in exchange for secure energy supplies in the future (interview no. 9)<sup>72</sup>. The war in Ukraine has made the need for such a strategic discussion even more acute.

The second relevant angle to the strategic autonomy debate when it comes to the EU's SN starts with the assumption that the southern neighbours may be themselves sources of vulnerability and dependency for the EU. Recent developments have shown that the EU has developed a more realist toolbox when it comes to relations with countries such as China or Russia (including reference to China as a systemic rival in a 2019 EU Joint Communication and EC proposals in December 2022 of new trade defence measures to be able retaliate any pressures exerted on EU member states). There is a case to be made for the EU to become also more realist in its relations with its southern neighbours. In line with the words of the HR/VP in his foreword

<sup>72</sup> A discussion on securing a sufficient domestic supply and avoiding a situation whereby green energy is exported to the EU while producing countries in the SN continue to rely on conventional energy for domestic consumption must be underlined here as well.

to the strategic compass<sup>73</sup>, the instrumentalization of migration should be considered as an unacceptable threat to the EU, which should find new strategies to deal with blackmail. Overall, the strategic compass could increase the security clout and credibility of the EU, giving it more room for action to impose its strategic autonomy (Fiott, D. and Lindstrom, G.), which should not be seen as contradicting its principles and values. As mentioned in a report of the European Parliament Research Service published in 2020, 'The efforts to bolster the EU's credibility as a geopolitical actor with strategic autonomy should be seen as prerequisites to sustain multilateralism' (Anghel, S. et al). An EU official primarily involved in cooperation programmes with neighbourhood countries further established a link with increased EU credibility in terms of security and military power on the one hand and increased effectiveness of its overall cooperation programmes on the other (interview no. 9).

This is not to say that the EU is inactive in conflict theatres around the region. In Libya, the EU Delegation has been active on the ground since the summer of 2021, after operating from Tunis. The EU co-chairs the Economic Working Group of the Berlin Process and has had a discreet yet important role in the process leading to the unification of its exchange rates. The EU as such is recognised by the Libyans as a neutral actor with a mandate to prepare the ground for the reconstruction process (interview no. 1). The EU has two Common Security and Defence Policy (CSDP) missions deployed in and around Libya. The Operation European Union Naval Force Mediterranean (EUNAVFOR MED) IRINI is implementing its core mission, which is to prevent the illegal flow of arms and oil in and out of Libya. It is facing difficulties in developing its complementary mission, which is to train the Libyan coastguard. The EU Border Assistance Mission (EUBAM) in Libya has been operating since 2013 and remains committed to its mandate, although deploying its activities in the south of the country proves a challenging task under the current circumstances. Through a project financed under the Instrument contributing to Stability and Peace (European Commission, 2021j), the EU has also played a discreet yet important role in facilitating the Montreux Agreement (United Nations Support Mission in Libya), (whereby key Libyan stakeholders agreed on an 18-month political timeframe, including holding elections) which led to the October 2020 ceasefire (European Commission, 2021j). The decision of EU foreign ministers in December 2021 to impose restrictive measures on the Wagner Group also has relevance in the Libyan context, where the Wagner Group is present, as documented in a publication (Kharief, A.) already mentioned in this study.

In Syria, the EU has been very consistent in its humanitarian efforts. It will host the sixth edition of the Brussels Conference in May 2022 with the triple objective to 'generate funding for the Syrian people and for refugee-hosting communities, to give a voice to Syrian civil society, and to increase momentum for a political solution to the conflict' (Council of the European Union, 2022). Thus far, the EU has also been consistent with regards to its political position, and the January 2022 conclusions of the Foreign Affairs Council stress that the war is not over and excludes any process of normalisation of relations with the Assad regime under the current circumstances.

The EU appointed a new EU Special Representative (EUSR) for the Middle East Peace Process in May 2021, who has been trying to restore the significance of the Quartet — an initiative established in 2002 bringing together the UN, the EU, the United States and Russia with the mandate to help mediate Middle East peace negotiations and to prepare for an eventual Palestinian statehood. EUSR Sven Koopman has also been trying to explore how the EU could take advantage of the momentum surrounding the normalisation process as a leverage to solve the Israeli-Palestinian conflict. However, the war in Ukraine makes the

<sup>73</sup> 'The world is full of hybrid situations where we face intermediate dynamics of competition, intimidation and coercion. Indeed, the tools of power are not only soldiers, tanks and planes but also disinformation, cyber-attacks, the instrumentalization of migrants [...]'- Borrell, J.

reactivation of the Quartet an unlikely scenario, while a possible failure of the Joint Comprehensive Plan of Action (JCPOA) may also further complicate the mandate of the EUSR.

Through the EU Coordinating Office for Palestinian Police Support (EUPOL COPPS), the EU has also contributed to confidence building, facilitating links between Israeli and Palestinian police forces, although some of its initiatives have been paralysed because of the political situation (interview no. 10). EUBAM Rafah is a dormant CSDP mission, but the reopening of the Rafah border point could constitute a significant step if a political dialogue were to resume between Egypt, Palestine and Israel.

At the time of writing this study, a discussion has started on how to possibly mobilise the European Peace Facility to support the Lebanese army in reinforcing its control capacity in the south of the country (interviews no. 10 & 19). On 22 March 2021, the Foreign Affairs Council adopted Council Decision 2021/509 establishing the European Peace Facility (EPF) as an off-budget instrument comprising, among others, the 'Assistance Measures Pillar' in the framework of which the EU may finance actions in order to strengthen military and defence capacities of third countries and support military aspects of peace support operations. However, there are some doubts on whether this is the adapted instrument to support the urgent financial needs the Lebanese Armed Forces, in particular to remunerate soldiers. If not through the EPF, there may be other avenues to explore to support the military, including under the thematic programmes of the NDICI (Peace, Stability and Conflict Prevention) or the rapid response mechanism of the NDICI.

Moreover, the EU remains committed to supporting multilateral tracks, involving not only the UN but also the League of Arab States, the African Union or ad hoc mediation initiatives under the Instrument contributing to Peace and Security (European Commission, 2021i) and, from now onwards, under the NDICI (see for example Priority Area 5 of the Regional Multi Annual Indicative Programme on 'Support to the main drivers of regional integration').

The EU has also continued to hold regular consultations with its partners in the MENA region at different levels. At the level of the EEAS Managing Director for the MENA region for instance, there have been specific consultations on the MENA region in 2021, including with Russia, Japan and the United States (interview no. 2).

Despite these efforts, there are legitimate reasons to wonder whether the 'strategic shrinkage' prophecy and the risk of the EU becoming a 'bystander', as mentioned by the HR/VP in the foreword of the Strategic Compass (Fiott, D. and Lindstrom, G.), haven't already started to materialise. While acknowledging its importance, some question whether the EU foreign policy niche as a strong supporter of multilateral institutions is enough. In an interview, an official of one MS argued that 'a by-default support to the UN position is no longer sufficient' (interview no. 25). While support to multilateral solutions and under the radar initiatives through projects can be useful in some diplomatic and conflict resolution interventions, visibility is also an important factor in foreign policy, and the EU often does not attract sufficient visibility for its initiatives. As already mentioned above, the EU did not attract the visibility it deserved for instance with its support to the COVAX mechanism (interview no. 42).

The EU toolbox is not adapted to dealing with conflicts in its SN where other major powers are involved (interview no. 10). This can be often explained either by divisions among its MS on the stance to take or by the political interest of some MS to become involved, participating themselves in conflict resolution formats. According to another observer, the EU toolbox is not adapted to deal with certain stages of the conflict cycle and is also not very good at 'carrots and sticks' in politically sensitive phases. In Libya, for instance, EU MS' diplomacy prevails at the moment, and the EU is waiting for its turn to intervene as part of the reconstruction process (interview no. 1). The EU is also routinely criticised for not capitalising on its instruments, and in particular for not transforming the presence it has through CSDP missions or financial assistance into political gains and a seat in conflict resolution mechanisms. An interviewee provided the



example of countries that benefitted from large CSDP military training missions and turned to other powers for military equipment or uniforms (interview no. 25).

### 2.5.2. Counterterrorism, preventing and countering violent extremism, promoting cooperation in the field of law enforcement and judicial cooperation

In many regards, the cooperation between the EU and its SN partners in the field of law enforcement reflects the broader dynamics of Euro-Mediterranean cooperation as described in other parts of this study. Euro-Mediterranean cooperation in the field of law enforcement is necessary for the partners to meet their objectives in terms of counterterrorism and the fight against organised crime, including, for example, human smuggling. Yet, law enforcement and judicial cooperation between the EU and its southern neighbours is less advanced than with its Eastern neighbourhood. The MENA region is, to a large extent, a missing piece of the law-enforcement cooperation puzzle (interviews no. 44 & 50), and tangible progress has been rather slow, for at least four reasons. First, political instability and the high turnover of interlocutors have made it difficult for the EU and competent agencies to establish lasting relationships and to develop cooperation in a continuous and incremental way. Second, if we take the case of Europol, it is only since 2017 that the Agency has been able to establish technical contacts with these countries, independently from the formal mandates it would receive from EU institutions. Europol continues to be constrained by many conditions when it comes to exchanging information with third countries. Third, and in relation to the previous point, SN countries are sometimes reluctant to engage in cooperation that is seen as non-reciprocal or not very operational. They do not always see the added value compared to their operational and less demanding bilateral cooperation with MS. Overall, it seems that the EU is predominantly on the demanding side when it comes to establishing this type of cooperation (interview no. 44). The exception is Israel, the most advanced country in the region in terms of its law enforcement cooperation with the EU. Fourth, and less structurally, the pandemic has also made it difficult for relationships between European officials and their counterparts to prosper over the period of 2020-2021. A visit of Moroccan officials to Europol, for instance, which had been scheduled has not yet been able to take place (interview no. 50).

Before 2017, there was no contact as no country of the region was included on the list of countries with which such a cooperation could take place, as determined by the Council of the EU. The 2017 Europol regulation paved the way for a more flexible cooperation ahead of the adoption of formal agreements. There are three main levels of cooperation. First, Europol may establish contact with its partners in the framework of EU-financed regional programmes (e.g., Euromed Police<sup>74</sup>, CT Inflow<sup>75</sup>, Cyber South<sup>76</sup>), to which the Joint Communication refers, calling for their 'swift implementation'. At that stage, Europol also has the possibility to develop ad hoc police partnership projects, a concept developed under the Portuguese Presidency in 2021 that provides Europol the possibility to develop structured relationships with these countries and identify common interests (interview no. 50). In this context, Europol has already started approaching counterparts in Morocco and Tunisia. These relationships constitute a steppingstone for a second level of cooperation. Europol may indeed establish 'working arrangements' with partners at its own initiative which result in a possible exchange of strategic information (excluding operational ones, except in very exceptional circumstances). Third countries engaging in such an arrangement may send a liaison officer to Europol and thus be part of a network of about 200 liaison officers. Liaison officers gain access to the Secure Information Exchange Network Application (SIENA), a Europol tool supporting the

<sup>74</sup> <https://www.cepol.europa.eu/projects/euromed>

<sup>75</sup> <https://www.cepol.europa.eu/projects/ctinflow>

<sup>76</sup> <https://www.coe.int/en/web/cybercrime/cybersouth>



exchange of information with 2 400 units connected in MS and third countries. From the EU's SN, only Israel has this type of arrangement with Europol, since 2018. Israel has also expressed interest in moving to the third level of cooperation, a formal agreement negotiated on the EU side by the Commission and adopted by the European Parliament and the Council, based on which an operational exchange of information becomes possible. These agreements require among other things a solid data protection framework from third parties (Coman-Kund, F.), which is arguably not a priority for many countries of the region (see also Section 2.2.1; interview no. 44).

Another important dimension in the Joint Communication (European Commission, 2021g) under the peace and security chapter is 'Terrorism and its financing, radicalisation, violent extremism, and the phenomenon of Foreign Terrorist Fighter'. No new initiatives or radical changes of strategic orientation have been announced in the Joint Communication (European External Action Service, 2021c). Yet, the focus on socio-economic development in the Joint Communication as a whole should come with a renewed effort to understand in a more holistic way 'the environmental factors that are suggested to create the conditions in which violence extremism can and cannot flourish' (Torrekens, C. and de le Vingne, D.). Ongoing projects such as Connekt (Connekt, n/d), a Horizon 2020<sup>77</sup> EU-funded research project that explores the drivers of radicalisation and violent extremism among young people, should help in this regard. In the last decade, an increased access to and sophistication of communication channels have driven research to the study of narratives and counter-narratives, religious leaderships and religious education (Chirchi, T. and Jrad, E.). A focus on religion (enhancement of interreligious and intercultural dialogue) combined with an emphasis on the digital environment have pushed an agenda in and outside the EU which is predominantly tailored to the understanding of religious radicalisation and the countering of narratives via online and social media (Torrekens, C. and de le Vingne, D.). As relevant as this might be, it tends to obliterate the intersection with several other of the abovementioned factors and the persistence of known or unexplored contexts and drivers of radicalisation. The lack of socio-economic opportunities, education, political grievances and claims of social marginalisation need to be added to the radicalisation equation, since they have a direct impact on perceptions and expectations which intervene strongly in any radicalisation process (DARE). EU bias and its specific agenda regarding preventing and countering violent extremism have also sometimes prevented the EU from properly contextualising the problem in each of the neighbouring countries and from taking into account the specificities and demands of local stakeholders. Finally, there is a continued trend in regarding prevention as a stage prior to the violent act, instead of regarding prevention as a long-term social investment intervening before the process of cognitive radicalisation is engaged (Torrekens, C. and de le Vingne, D.). The possibilities to address the structural factors which allow for an explanation of the exacerbated perception of inequalities and marginalisation have curtailed efforts to build community resilience against radicalisation and violent extremism as a cornerstone of prevention (CONNEKT Seminar Report, 2020).

The current context of polarisation (McNeil-Wilson, R. et al.) in the EU regarding European Muslim communities feeds the previous longstanding religious approach and is strongly unfavourable to a shift in the preventing and countering violent extremism paradigm (Torrekens, C. and de le Vingne, D.). Following the debate on Muslims and Islam in France, Muslim activism tends to be associated with the Islamic political ideologies that were on the rise after the popular uprisings (Arab Uprisings) in 2011 and that now experience a harsh political demise in their countries of origin (Islam, S.). In that sense, European political leaders seem to have adhered to the discourse of several Arab governments, which have assimilated political Islam with violent extremism regardless of its stances towards the use of violence. The consequences of this shift in the apprehension of political Islam actors both within and outside the EU

<sup>77</sup> <https://ec.europa.eu/programmes/horizon2020/en/home>

translates into a more robust support for rather authoritarian political systems on the southern shore of the Mediterranean. Such support and the EU's predisposition to cooperate in counterterrorism matters reinforces and legitimises their repressive policies towards dissidence, either due to their adherence to Islamist tenets or due to the fact that non-Islamist dissident political actors are assimilated by the state as Islamists as a way to de-activate their political engagement and legitimacy (the case of Egypt can exemplify this process of support-legitimation).

European pragmatism and the quest for stability have prevailed over nuances regarding who is and who is not a terrorist, and this has reinforced repressive and authoritarian stances on this issue. At the European level, this has reinforced the idea that European Muslims are outsiders and that Muslim activism, no matter its nature and purposes, poses a threat to European core values. This polarising context has several drivers — economic, social, political and digital, among others — which intervene in the complex equation of radicalisation processes.

Regarding violent extremist groups in the SN, it is important to acknowledge the backlash that ISIS suffered in Syria and the evident diminished capacity of the organisation on the ground and abroad. The international coalition and the SDF (Syrian Democratic Forces) managed to regain the territory formerly controlled by ISIS, but the organisation's capacity and functioning has not fully disappeared. The attack to the Hasaka prison in early 2022 where jihadi prisoners were held proved that the organisation is a hydra that has capacities to survive despite its shrinking territory, recruitment capacity and after the killing of its two previous leaders. Thus, the territoriality of ISIS might not emerge as a problem, but their replication potential presents a considerable level of uncertainty. ISIS has prompted new local groups that enjoy greater capacity to attack in their immediate local environments, as proved by ISIS-K in Afghanistan. The remains of ISIS in other SN countries such as Libya might re-emerge, either under the ISIS umbrella or under new local configurations. At the same time, al-Qaeda has not ceased to exist and still has a certain influence in some weak states or conflict theatres. To such end, cooperation is still needed to apprehend the new morphologies of what remains of ISIS, the local groups operating domestically and the renewal potential of al-Qaeda in order to assess and evaluate the threat that they might potentially pose.

Finally, it is important to remember the situation of ISIS combatants and their families who enjoy European citizenship. Particularly worrying is the situation of women and children born or raised under ISIS rule in recent years and after the fall of Raqqa and Baghouz. Over 60 000 people, most of them women and children, are held in the detention camps of Al-Roj and Al-Hol in Northeast Syria under very harsh conditions. Estimates indicate that 13 500 'foreign' women and children (non-Syrians or Iraqis) are held by Kurdish forces mainly in al-Hol, in addition to 1 000 or 2 000 male foreign fighters detained in Hasakah. Of them, there are currently estimated 640 European children and some 400 adults in the detention camps.

Despite deteriorating conditions in the camps, European governments remain hostile to the repatriation of their nationals from Syria. Although most of them emphasise the right of children to return, and some Court decisions have demanded the repatriation of children, often with their mothers, they have been unwilling to do so except in a select few cases. Certain countries have even stripped their nationals in Syria of their citizenship, avoiding thus any obligation of repatriation (Belgium, France, Denmark and the Netherlands, for example). The option of an 'international tribunal' has been explored since 2018 but is considered unpractical. The option of trials in Iraq and Syria has implications regarding international law and geopolitical balances but remains as an alternative to repatriation. Even though repatriation has been pointed out as the most suitable solution for security, legal and ethical reasons — and that of children is seen as an obligation under international law — the threat posed by returnees discourages political initiatives in this sense. All in all, cooperation with the Southern partners appears to be inevitable in the short and medium term, as the management of these detention camps and the future status of European

detainees should not rest only on the shoulders of Kurdish forces. Furthermore, whichever options may be on the table, they will all require concertation among the actors from the different countries involved, whether for organising trials or coordinating repatriation processes.

On another note, the EU should pay increasing attention to terrorism trends in Sahel countries and their destabilisation effects on the EU's direct southern neighbours. Mali is a case in point and the EU should invest much more in military and counterterrorism operations in the country (interview no. 25). Mali's situation can have devastating effects on Morocco or Algeria. The EU's cooperation with its partners in different fora is important. In this regard, it is worth noting that the EU will co-chair the Global Counterterrorism Forum (GCTF) Coordinating Committee<sup>78</sup> meeting in March 2022, after having co-chaired the capacity building working group for the East African region<sup>79</sup> in this forum since 2017.

### 3. Recommendations

#### **The need for a more strategic framework to steer the EU's actions in the Mediterranean**

The Joint Communication offers a useful roadmap on how the EU may contribute to the inclusive and sustainable socio-economic development of its SN partners. However, it cannot be considered an integrated and comprehensive strategy *vis-à-vis* its SN. In the light of the structural trends underpinning Euro-Mediterranean relations and recent developments, additional strategic effort is needed to guide the EU's actions in its SN. More specifically:

- The EU must invest renewed efforts in better understanding how it is perceived by its SN partners and how these perceptions have evolved in recent years among different groups of stakeholders: national governments, local and regional authorities, the private sector and different population segments (youth, rural and highly educated, among others). The evolution of the debate on Islam or migration in some MS has had a direct impact on the EU's relations with its SN partners. The EU needs to be aware of how its domestic developments and own actions may jeopardise mutual understanding and a larger Euro-Mediterranean partnership in the spirit of the Barcelona Declaration of 1995.
- The need for such a review of the EU's image in the SN has become urgent in the light of the Russian invasion of Ukraine. The EU should carefully analyse the official positions and reactions of its partners to the war in Ukraine and determine to what extent such reactions reflect a realignment of alliances of SN countries. While seeking political and diplomatic support from its SN partners, the EU will need to find balance between firmly defending its legitimate interests without feeding sensitivities and exposing itself to criticism of interference. The EU should engage in a very frank dialogue with its partners, taking into account their concerns and interests while seeking to clarify the strength and the meaning of Euro-Mediterranean relations. Beyond engagement with governmental partners, the EU will need to carefully analyse public reactions, tailor accordingly its communication in the region and address disinformation (see below) when there is evidence that social media were used to amplify or trigger hostile discourses against the EU. The EEAS could be tasked with initiating a discussion involving other EU institutions and bodies, including the European Parliament, on how the region fits into the ongoing debate on the EU's strategic autonomy. In this context, the SN should be seen as both a possible partner to reduce the EU's vulnerability and dependency in some cases, but also a possible source of dependency in others.

<sup>78</sup> <https://www.thegctf.org/What-we-do/Coordinating-Committee-Meetings>

<sup>79</sup> <https://www.thegctf.org/Working-Groups/Horn-of-Africa-Capacity-Building>

## **Shaping the optics**

- While efforts undertaken by the EU when it comes to strategic communication and the fight against disinformation are welcome, more coordination and alignment of common messages are needed between the different EU bodies as well as between the individual positions designated for work on these issues. Moreover, while good progress has been made with allocating more resources to these topics and engaging with SN audiences, as well as launching communication in Arabic, the human and financial resources remain insufficient especially when compared to the efforts of some individual MS or partners like the United States, and further efforts need to be made to create and convey tailored messages to specific audiences in SN countries.
- Additionally, when it comes to disinformation, it appears that EU efforts focus solely on countering mis- and disinformation regarding the EU and its actions in the SN. This is a very important aspect, but the actions taken by the Task Force South in the EEAS should mirror more the monitoring and debunking work done by its sister arm in the EaP, even if this type of work is much more sensitive in the SN than the EaP.
- More coordination and alignment of common messages remain needed across different EU bodies and institutions. Along the same lines, a comprehensive web platform to showcase actions from all EU institutions and bodies in different countries of the region is still missing.

## **Revisiting policy paradigms when they do not work, reforming the European Neighbourhood Policy**

- The EU also needs to acknowledge that some of the paradigms it has consistently promoted under the ENP have been equally consistently rejected by its SN partners. This calls for adjustments and the development of new policy concepts. One of the best examples is how the EU has insisted on linking visa facilitation with the signing of readmission agreements, which has been systematically rejected by SN countries. This case also illustrates that some EU MS and SN countries alike see limited added value in these agreements and prefer engaging through more pragmatic and bilateral channels.
- Notably, the different trajectories of the EaP and the SN, illustrated for instance by the fact that some Eastern partners have been granted visa liberalisation or have signed DCFTAs — and indeed formal requests to join the EU have been submitted by Ukraine, Georgia and Moldova following the Russian invasion of Ukraine — question the very existence of a single umbrella framework for both the eastern and southern neighbours of the EU.
- A well-calibrated discussion on the parameters of the SN dimension of the ENP could be considered, provided it is done in an inclusive way. Accordingly, and using the provisions of the Joint Communication in terms of political dialogue, a summit at the heads of state and government level could be convened during the Spanish Presidency of the Council of the EU in 2023.
- Any reform of the southern dimension of the ENP should also aim at making it less rigid and less scripted, and at reducing the amount of energy absorbed by carrying out routinary and protocol exercises to the detriment of more flexible and strategic initiatives.

## **Revisit the project approach of the UfM, empower the role of the UfM as a convener of policy dialogues**

- Given its shortcomings, the project approach of the UfM — currently based primarily on the concept of labelling — should be revisited.

- Based on encouraging precedents including the pre-COP UfM discussions on climate change, UfM member states should increasingly use this institution as a facility to reach common policy positions and objectives and define win-win strategies, including in the field of energy.

### **Reinforcing the weight of some specific aspects of the New Agenda**

- The levels of corruption in the region and the perception of impunity largely explain the mistrust of citizens with their representatives, which were significant causes leading to the popular movements across the region. Corruption also hampers the socio-economic development of these countries across the board. Therefore, the EU should more explicitly incorporate corruption into its incentive-based approach and define more specific benchmarks accordingly. Country and regional projects in support of anti-corruption should lean against a thorough analysis of how successful EU anti-corruption actions have been thus far. A multi-stakeholder event — involving international (Council of Europe, Transparency International), regional, national and local organisations and civil society — on corruption in Mediterranean countries could also be organised.
- The Joint Communication has arguably opened new horizons for cooperation between the EU and its partners on social aspects. This should be intensified and constitute one of the key aspects of how the EU communicates about its action in the region.
- The EU should continue to pay special attention to supporting women and youth while ensuring this support is integrated in all activities on top of employing dedicated programmes. More focus should be placed on removing barriers to women's political participation. Moreover, women rights organisations and NGOs focusing on youth activation should be consulted while designing interventions and long-term support (both financial and technical), beyond project-cycle assistance (For lessons learnt from the EU's Gender Action Plan II, see, e.g., Brechenmacher, Henckes and Lledo).
- In order to support the transition towards a formal economy and to reform social protection systems, the governments in the SN must focus on regaining the trust of their citizens and renegotiating existing social contracts. Indispensable in this process is cooperation with civil society and third sectors, which the EU should continue to support.
- Furthermore, in order to support improvements in the situation of public services in the SN countries, and especially in the health care sector and for social protection measures, the EU should consider an extension of debt forgiving or restructuring initiatives.

### **On programming and the Economic and Investment Plan**

- Regarding the process of programming the EU's actions in the SN, going forward, it would be beneficial for both internal and external consultations to be more inclusive. First, more internal actors should be involved at the early stages of programming to ensure that the proposed actions, in particular those enlisted in the EIP, are both politically desirable and economically viable, and so to secure a better buy-in.
- Second, in order to truly reflect the interests of both the EU and its MS and SN partners, consultations in SN partner countries should go beyond talks exclusively with the governmental counterparts, as it appears to have been the case with the Joint Communication. Involving LRAs, civil society and the third sector could help to ensure that the actions undertaken by the EU in the region will truly benefit the people of the SN. Importantly, a more inclusive process would also give more legitimacy to its outcomes and, consequently, the implementation of the incentive-based approach — in other words, conditionality — which is arguably the most contentious aspect of the EU's relationship with the SN.

- It would be beneficial for the credibility of the plan to leverage up to EUR 30 billion in public and private investment if more information on the methodology behind the EU's financial estimations was published.

### **Prioritising improvement of the business climate in the region**

- The much talked about potential to re-shore EU production to the SN will have a chance to be fulfilled only if the environment to conduct business in the region is improved; predictable legislation, a trustworthy and efficient judiciary and a simplified bureaucracy — all these elements must be present before businesses will consider embarking on the resource-consuming process of moving their production.

More broadly, the same applies to ensuring that the much-needed investment is flowing into the region. While efforts towards the mitigation of investment risks such as credit guarantees and increased support from EU financial institutions are steps in the right direction, expectations should be managed both within the EU and in conversations with partners in the SN regarding the effectiveness of these measures should the business climate in the region not improve. In this sense, tying investment to the implementation of much-needed reforms, for example, on rule of law and good governance is warranted.

### **Digitalisation with a human face**

- While maintaining an ambitious approach is important, digitalisation goals must be kept realistic. A starting point should be working on ensuring access to fixed broadband and, in the case of public administration, adequate hardware.
- Particular attention should be paid to narrowing of the digital gap across gender, geographic, ethnic and demographic (age) lines.
- The EU should provide technical assistance for developing data protection laws, building on its own experiences in drafting and implementing the GDPR.

### **Towards clean energy**

- The EU should evaluate whether the funds assigned for climate-related actions in the SN region are sufficient to tackle all the challenges and compensate SN countries for potential losses and disadvantages. This is particularly important in view of the relative lack of prioritisation of environmental actions among policymakers in the region, especially in the coastal low-lying (below the altitude of 5 metres) and very densely populated areas, such as the Nile Delta. Limiting the current adaptation financing gap would be a step in the right direction.
- In order to phase out environmentally harmful subsidies for fossil fuels across the region, the EU should instead incentivise sustainable options — for example, in the form of tax relief for those investing in energy efficient solutions, as well as at the sub-national level so that local authorities and stakeholders also become accountable for the implementation of nationally or internationally agreed commitments and measures such as SDGs.
- Merging the environmental protection goals of the EU and the investment needs of the SN, the partnership can be built around the commitment of the EU to invest in renewable energy and clean hydrogen in the SN to both help their economies and secure energy exports to the EU in the future.
- In the light of a looming food-related crisis due to shortages of wheat and fertilisers on the market previously imported from Russia and Ukraine, further investments towards making SN food systems



more self-sufficient and resilient are needed in accordance with the COM agenda. Priority should be given to low-carbon fertilisers, produced using for example 'green' ammonia.

### **Finding multipliers and allies to reinforce the EU's approach and contribution to the inclusive and sustainable socio-economic development of its SN partners**

- Complementarily with the EU's direct contribution to the socio-economic development of its SN partners, the EU should also engage with Libya's neighbours Egypt, Tunisia and Algeria to see how they could make the most of Libya's reconstruction and development and the EU's plans in this regard.

A pragmatic dialogue should be intensified with Gulf countries in order to identify how and under what conditions they could be involved in or complement the EIP, in particular when it comes to investing in the field of energy transition and large infrastructure projects such as the already-mentioned hydrogen-related ones in accordance with the recent COM REPower EU communication. More broadly, closer coordination with other donor and investor countries is warranted to enhance the efficiency and effectiveness of funding. The dialogue also should include — beyond the Gulf Cooperation Countries, United States and other 'Western' donors — China and Turkey in order to identify any opportunities for common activities or at least to avoid the duplication of efforts. Infrastructure projects are in particular a good candidate for shared actions.

- Any new schemes introduced by the EU to alleviate unemployment will require a rigorous assessment of (not only financial) the capability to implement such programmes on the partner countries' end. For example, although new financial schemes oriented specifically on fostering the social economy in the SN countries are needed, the EU's support should go beyond this and strengthen the broad range capacity building of the stakeholders. Thus, complementary to financial support, this can also be provided in terms of experience sharing, technical assistance or facilitating necessary training.
- Further EU support for the local production capacity of vaccines in the SN countries (including technology transfers) is needed to alleviate the disproportion in the distribution of vaccines across the Mediterranean and to respond to the criticism which appeared due to blocking the suspension of patent rights of the COVID-19 vaccines.

### **Educating for the future**

- Skills mismatch is one of the key problems in the SN region. While populations in the region, in particular women, are increasingly — at least formally — well educated, high levels of unemployment among the younger generation prevail, and employers in the region complain how difficult it is to find skilled employees. Governments in the region should be given support in designing educational programmes based on an assessment of the needs of the market while giving priority to skills such as critical and creative thinking, which will allow students to adjust more easily to the realities of the labour markets of the future. Furthermore, the EU together with its partners in the SN countries could work on the promotion of new, inclusive economic models in the education system.
- Supporting the introduction of digital education alongside every step of the educational path must be ensured. Trainings of teachers and aid in purchasing appropriate school equipment are some of the ways in which this can be accomplished.

- Much-needed vocational training programmes should go beyond supporting handicrafts. Financial support to VET programmes must be awarded following strict analysis of the needs of the local markets.
- The EU should work with its partners on making the Erasmus+ programme more accessible to the students from the SN countries and supporting the South-South cooperation in this field. In this context, it is worth highlighting that virtual exchanges appeared as a modern, cost-effective and inclusive tool which can complement physical mobility.

## **Migration**

- The EU should revisit the costs and benefits of its externalisation policies and, on the basis of this exercise, align these policies with its overarching long-term goals, including those contained in the New Agenda.
- While introducing legal migration instruments such as Talent Partnerships, the EU should seek to avoid negative conditionality which might further irritate the SN partners. Any instruments of this kind should also take into account and address the consequences of a possible related brain drain from the SN countries.
- Further efforts have to be invested in ensuring the effective implementation of the European Regional Development and Protection Programme (RDPP), especially in Algeria and Tunisia.
- The possibilities of cooperation with the SN partners within the framework of RCPs on migration should be further explored and exploited. The already functioning fora such as the Khartoum or Rabat Processes have been serving as platforms for seeking common solutions on the political level (ministerial conferences) as well as introducing specific solutions on the operational level, including via joint projects.

## **Foreign and security policy**

- Most of the shortcomings of the EU's action in the region are not specific to the SN and rather relate to more the structural limitations of the EU's foreign policy. As such, they deserve structural responses that go beyond the scope of this report and relate to ongoing discussions on decision making in the EU's CFSP (qualified-majority vote instead of unanimity) and the increased military and security credibility of the EU, an effort that the Strategic compass has started to make.
- Tensions with Russia may complicate the task of the EUSR for the Middle East Peace Process to reactivate the Quartet. In the short term, his efforts should concentrate on harnessing the potential of the normalisation agreement between Arab countries and Israel and turning the EU into an active facilitator of this process, provided this is done in a way that directly helps in solving the Palestinian-Israeli conflict. While doing so, renewed dialogue between the EU and its Gulf partners will be key.
- Overcoming stumbling blocks to finalise the Gaza desalination plan will send an important signal in this regard.
- The EU should also explore with Egypt and other partners the possibility to create a Gaza seaport in Sinai.
- On the contrary, the EU should be very firm in policy dialogues with its partners, including Israel, that the geopolitical consequences of the normalisation agreement should avoid creating new dividing lines and introducing new sources of tensions in the region.

- In line with the European Council tasking and as mentioned in the Joint Communication and the Council conclusions, the EEAS should intensify its efforts towards convening a multilateral conference on the Eastern Mediterranean.
- In the light of the renewed focus on the inclusive and sustainable socio-economic development of its partners, the EU should use ongoing research projects working in the SN, such as Connekt, as a basis to definitively change the prevailing discourse on the drivers of radicalisation and violent extremism and to recognise the importance of the socio-economic environment. The EU's response to extremism must not lead to the community's stigmatisation.
- Coordination among EU and SN countries on exchange of information, best practices and countering violent terrorism coordination is necessary to respond globally to a threat that is also globally posed. Furthermore, bilateral coordination and cooperation should be promoted with those countries presenting similar problems regarding foreign fighters (and their potential repatriation). Finally, efforts should be invested in exploring approaches to the prevention of radicalisation and violent extremism that compel issues of inclusion, social cohesion, socio-economic opportunity and positive socio-political engagement.
- As part of its counter terrorism strategy, the EU should express unequivocally its readiness to help its North African neighbours in dealing with terrorism coming from Sub-Saharan African countries.
- When it comes to cooperation on law enforcement, it appears that — with the possible exception of Israel — it is rather the EU (including Europol) that is on the demanding side when it comes to advancing this cooperation. The EU should spend renewed efforts in explaining to SN partners the added value of this cooperation, both complementing and reinforcing the bilateral cooperation channels of these countries with individual MS.

### **Supporting evidence-based policymaking**

- The EU should support the generation of local data that is disaggregated by various socio-economic measures, including gender, age, region and educational attainment. National statistical offices as well as tertiary education institutions should be offered technical assistance and financial support to collect up-to-date, publicly available data. This is crucial for better policymaking not just within the SN, but also for the EU, which oftentimes (also for the abovementioned evaluations) relies on a variety of indices which themselves are based on whichever data is available.
- At the same time, the EU should use its experience introducing the General Data Protection Regulation to provide technical assistance to the SN countries in the introduction of personal data protection policies.

### **On the role of the European Parliament**

- Focusing on the role of that the EP can play in the implementation of the Joint Communication, two main aspects stand out: through oversight and parliamentary diplomacy. Regarding the former, while the EP has various powers over the design and implementation of EU acts (including veto power over Delegated Acts) and is involved in high level dialogue with the EC, its scrutiny powers were somehow limited by making it an observer rather than a member of the EFSD+ strategic board and, consequently, not granting it authority over the use of blending and guarantees. Moreover, the EC has the sole mandate to decide on the disbursement of the emerging challenges and priorities cushion, although the EP will have to be informed 'in detail (...) before the mobilisation of the cushion and (the EC committed to) fully take into consideration its remarks' (European Parliament, 2021).

- When it comes to parliamentary diplomacy, this can be implemented mainly through the work of parliamentary bodies within regional and international organisations and maintaining direct diplomatic relations with counterpart parliamentary as well as governmental bodies (see, e.g., Jancic, D. et al.). The Parliamentary Assembly of the Union for the Mediterranean (UfM), even when accounting for all the issues with the functioning of the UfM itself (as listed throughout this study) as well as the varying degree of powers of the parliamentary representatives in the SN countries, remains a valuable forum for discussion and exchange of opinions. Election observation missions will be key to protecting the process during the upcoming elections in Lebanon for instance. In Tunisia, in the light of the socio-economic and political situation, the EP can support the process of carrying out a structured critical analysis of the EU's engagement in the country since 2011 and identify how its support could have been more decisive in helping the countries reform and develop for the benefit of all their citizens.

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