Oxfam Briefing Paper

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The Euro-Mediterranean Agreements

Partnership or Penury?

Foreign Ministers are due to meet in Naples to discuss the next steps in the Euro-Mediterranean Partnership on December 2 and 3. The vision behind the free trade zone is to bring greater stability and prosperity to the whole region. However, the EU stands to gain most from the deal at a time when poverty in the Middle East and North Africa is rising. Almost a quarter of the population earns just $2 per day. Arab economies need better safeguards if poor people's livelihoods, particularly in agriculture, are to be protected. Oxfam believes that true partnership requires a more equitable trading relationship that can benefit both the EU and Arab countries.

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Introduction

In December 2003 the Foreign Ministers of the Euro-Mediterranean Partnership will meet in Naples to discuss progress achieved in strengthening political, cultural, and economic cooperation across the Mediterranean basin. At this meeting, the Foreign Ministers[1] are expected to agree upon the next steps for establishing a Mediterranean Free Trade Area, including steps for reciprocal liberalisation in agriculture and services. '*Set to become the world's biggest market place*,'[2] the free trade area would foster free trade in industry and services, and progressive liberalisation in agriculture between the Arab Mediterranean countries and the European Union (EU).

To create this free trade area by 2010, the Arab Mediterranean countries[3] are in the midst of negotiating or implementing trade agreements with the EU, their largest trading partner.[4] According to the EU, establishing the free trade area is a necessary step to fulfil the Euro-Mediterranean Partnership's objective of creating an area of '*shared prosperity*'. However, the benefits of the agreements on economic growth in the Arab Mediterranean region cannot be taken for granted. The most optimistic scenario envisages a 3 per cent increase in economic output in the Arab countries over the entire implementation period.

The impact of the trade agreements on poverty reduction is even more uncertain. In the short term, it is not likely that the agreements will bring benefits to the vast majority of people living in the Arab Mediterranean region. Indeed, there will be high costs in terms of employment, agriculture, and social services. Industrial free trade, for example, is expected to lead to the following consequences:

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[1] Communication from the Commission to the Council and the European Parliament to prepare for the VI Meeting of the of Euro-Mediterranean Ministers of Foreign Affairs, Naples, 2-3 December 2003 (Barcelona VI), 15.10.2003, http://europa.eu.int/comm/external_relations/euromed/conf/naples/com03_610en.pdf

[2] Combined with the European Free Trade Area, the Mediterranean Free Trade Area will eventually encompass some 40 States and 600 to 800 million consumers.

[3] The Euro-Med Partnership involves the European Union and 12 Southern partners. In addition to the Arab Mediterranean countries, the Partnership involves two accession countries (Malta and Cyprus), a candidate country (Turkey), and an industrialised country (Israel).

[4] Five of the agreements are in force (Jordan, Lebanon, Morocco, the Palestinian Authority, and Tunisia), two are awaiting entry into force (Egypt and Algeria), and one (Syria) remains to be negotiated.

- **Severe employment losses,** resulting from the opening of the heavily protected industrial markets of the Arab countries to EU exporters: for example, only 30 per cent of local industries in Morocco are expected to survive under conditions of free trade.
- **Decline in government revenues:** with the dismantling of tariffs, government revenue losses will vary between 1 and 5 per cent of gross domestic product. It is estimated that Lebanon, a highly indebted country, will incur a loss equivalent to some 5 per cent of economic output when tariff rates on EU industrial goods are set to zero. The danger is that **these losses will lead to cuts in spending on social welfare programmes**.

This paper argues that if the EU is serious about its commitment to comprehensive partnership in the Mediterranean region, it must be **equitable in its trading relations.** The trade agreements should not go beyond the parameters that were agreed at the **World Trade Organisation** (WTO).

The trade agreements include wide-sweeping provisions on services, intellectual property rights, and government procurement. In negotiations on these issues, the EU should not seek commitments on services, and protection of intellectual property rights beyond that enforced by the World Trade Organisation, unless it is in a direction that will benefit low-income communities. The 'Singapore' issues (Investment, Competition Policy, Trade Facilitation, and Transparency in Public Procurement) should not be forced on to the Euro-Med agenda unless requested by the Arab partners. This is all the more important as a number of Mediterranean countries (Algeria, Lebanon, Palestinian Authority, Syria) have not yet acceded to the WTO.

Moreover, although the reform of the EU Common Agricultural Policy (CAP) is beyond the remit of the Euro-Mediterranean Partnership, the adverse effect of EU agricultural **subsidies and protectionism** on Arab Mediterranean producers must be discussed.

To make trade work for poor people, national governments of the Arab Mediterranean region must place **poverty reduction** at the heart of their national policies. The national governments, with the financial support of the EU, must ensure that trade reforms – and their expected impact on industrial employment, government revenues, and agriculture – do not lead to further impoverishment of people living in the Arab Mediterranean region.

Costs and benefits of the agreements

The free trade agreements, called the Euro-Mediterranean Association Agreements (Euro-Med Agreements), replace the 1970s Cooperation Agreements between the EU and the Arab Mediterranean countries. The former trade agreements were characterised by non-reciprocal preferences: i.e. the EU unilaterally opened up its industrial markets to most Arab Mediterranean countries. Most Arab Mediterranean goods have therefore had duty-free access to EU industrial goods since the mid 1970s. Under the present agreements, the EU is asking countries to 'reciprocate' by opening up their heavily protected industrial markets. Over a 10 - 12 year period, the Arab countries will bring their industrial tariff levels from an average of 30 to 40 per cent down to zero.

In exchange for dismantling all tariffs on EU industrial goods, the Arab Mediterranean countries have been granted slight improvements in access to EU markets, and financial assistance to face the high social costs of economic transition.

EU reaps the benefits of the agreements

The Arab countries are hoping that the trade reforms will help to enhance employment and economic growth in the region in the long term by increasing competition and productivity, promoting technology transfer, and increasing direct foreign investment in the region. As traditional sources of economic growth – remittances, oil, the public sector, and foreign aid – dry up, trade is increasingly being emphasised as an engine for employment growth. In a recent interview, a World Bank economist declared, '*right now, the model of closed, protected economies can't provide enough jobs*'.[5]

However, the trade agreements are likely to bring only modest or negligible gains to the Arab Mediterranean countries in the short term. The agreements bring little export advantage to the Arab Mediterranean countries, while they oblige these countries to fully open their heavily protected markets to EU industrial exporters. The **EU is likely to be the main short-term beneficiary of the agreements**.[6] According to one study carried out into the agreement

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[5] 'Cancun 2003: A Look at Trade and Development in the Middle East and North Africa', Mustapha Kamel Nabli, World Bank Chief Economist for the Middle East and North Africa Region, 2 September 2003.

[6] 'The Political and Economic Aspects of the Euro - Mediterranean Partnership', Clara Mira Salama (April 2002), European Development Policy Study Group, Department of Economics, Manchester Metropolitan University.

signed between Tunisia and the EU,[7] the estimated benefits were likely to be eight times higher for the EU than for Tunisia. While the magnitude of these estimates may be questionable, there is no doubt that the lion's share of the potential benefits of the agreements will accrue to the European exporting firms.

Social costs of free industrial trade

There is a unanimous view that the costs of adjusting to free industrial trade will be high for the Arab countries. The predicted costs of trade reforms include severe employment losses in local industries and a significant decline in government revenues.

Severe employment losses in local industries

Arab countries will no longer be able to use high tariffs to shield their industrial markets from EU competition.[8] Free trade is therefore likely to lead to severe employment losses in the industrial sector. In Morocco, for example, only 30 per cent of local industries are expected to survive competition from imported goods.

To help local industries to adjust to the new environment of free trade, national governments are implementing industrial competitiveness programmes, with the financial support of the EU. However, even with such programmes, the impact of free trade on local industries is likely to be severe, especially for small and medium-sized enterprises. The agro-food industry will be the one most negatively affected by the increasing trade openness, given the fact that it is one of the sectors with the highest tariffs.

In a region suffering high unemployment rates, this is a cause for particular concern. According to a recent World Bank report, the Arab countries are facing an unprecedented employment challenge: in the whole of the Middle East and North Africa, around 50 million

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[7] 'Regional Trading Blocks as a Response to Global Poverty: A Critique of the Euro-Mediterranean Agreement', Andrew Mold, Instituto Complutense de Estudios Internacionales, 2002.

[8] The structure and sequencing of tariff-dismantling schedules result in an initial increase in effective protection rates: tariffs are dismantled first on capital goods and intermediate inputs, and only in later stages for domestically produced consumer goods. Detailed reviews of three countries (Egypt, Morocco, and Tunisia) suggest that the agreements led initially to higher effective protection rates for several sectors, and only later to substantial liberalisation (Oxfam-commissioned research).

new jobs will be needed in the next decade just to keep pace with the rapidly expanding labour force.[9] Without rapid job creation in Arab countries, there is a real danger that progress achieved in poverty reduction in the 1970s and 1980s will be reversed. Already, over the past decade, the proportion of the population of the Middle East and North Africa living on less than $2 a day has increased from 21 to 23 per cent.[10]

To limit employment losses, Oxfam recommends the following measures:

- Arab countries should be allowed to retain selective protection on industrial goods.
- Arab governments must also put in place appropriate safety-net packages, to ensure that workers who are displaced by competitive forces receive retraining or other forms of assistance.

Significant declines in public revenues

One of the major costs of eliminating tariffs on EU imports is the expected decline in import tariff revenues for Arab countries, particularly those countries with high dependence on imported EU products, such as Lebanon, Morocco, and Tunisia. It is estimated that public revenue losses will amount to 5 per cent of gross domestic product for Lebanon, when the tariff rates on EU industrial goods are set to zero. Tunisia is expected to incur a loss equivalent to 2.4 per cent by 2008, and Morroco a loss approximately equivalent to 2 per cent.[11]

To compensate for the revenue losses, Arab governments will have to increase tax rates or broaden their tax base. The danger is that if public revenue losses are not replenished by domestic tax or external aid, there will be large cuts in social spending.

- The Arab governments must ensure that domestic tax reforms are not regressive, i.e. that they do not have a negative impact on the poor. The lion's share of the tax burden should not be put upon the lower-income classes, and a fairer tax system should be introduced.

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[9] 'Unlocking the Employment Potential in the Middle East and North Africa: Toward A New Social Contract', World Bank, September 2003.

[10] The total number of poor people in the Middle East and North Africa is now 68 million. See 'Middle East and North Africa: Regional Assistance Plan.', Department for International Development, London, September 2003.

[11] Quoted in 'Economic and Financial Dimensions of the Euro-Mediterranean Partnership', by Jose Maria Garcia Alvarez Coque and Alexander Sarris, Oxfam-commissioned report, March 2003.

Fairer agricultural trade rules

The trade agreements place the onus of trade and domestic reforms on the Arab Mediterranean countries, without raising the issue of the EU's contentious Common Agricultural Policy (CAP), through which it heavily subsidises and protects its own agricultural markets.

The CAP is the world's most **expensive system of agricultural subsidies,** costing the EU some €43 billion a year. The agricultural sector in the EU is supported and protected through a complex system of price support, production quotas, import restrictions, and export subsidies. The case of olive oil, an export of great interest to many Arab Mediterranean countries, is illustrative: in 2001, EU taxpayers supported the olive-oil sector to the tune of €2.5 billion.[12] Almost all of this was paid as production aid to Spain, Greece, Italy, Portugal, and France; the rest of the payment was made in the form of border protection. After the 1998 reform of the EU olive-oil sector, producer subsidies as a proportion of total gross earnings of olive growers actually doubled from 20 per cent in 1992 to 40 per cent in 2000.

Special and differential treatment or reciprocal concessions

According to the terms of the trade agreements, agricultural trade between the EU and Arab Mediterranean countries is to be liberalised on a *partial and reciprocal basis*. In addition to the limited number of provisions on agriculture in the initial trade agreements, further rounds of agricultural protocols are to be negotiated on a bilateral basis. The first rounds of agricultural protocols have been concluded with Tunisia and Morocco, the first countries to sign the Euro-Med agreements.

The main question is whether the EU is using this concept of reciprocity to pursue its **own aggressive market-access strategy**: i.e. whether it is 'trading' higher concessions by Arab Mediterranean countries (generally for 'continental' products like cereals, livestock, and dairy products imported from the EU) in exchange for EU concessions for 'Arab Mediterranean' products. During the negotiations on agricultural clauses of the trade agreements, the EU

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[12] The producer subsidies as a proportion of the total gross earnings of olive growers doubled from 20 per cent in 1992 to 40 per cent in 2002. The Percent Producer Subsidy Estimate in olive oil is above 50 per cent, of which 15 points are due to price regulations (basically border protection) and 35 points are the result of direct payments to producers (Garcia Alvarez Coque and Alexander Sarris, op. cit., 2003).

negotiating teams have persistently insisted on a *quid pro quo* basis for any concessions.[13] The agricultural protocol negotiated between the EU and Tunisia in 2000 is illustrative: Tunisia asked for enhanced market access in order to increase its olive-oil exports to the EU; in return, the EU asked for a further opening up for EU wheat and oilseeds.

The asymmetries in the region are very significant: the GDP *per capita* ratio is 18.5 between France and Morocco, 15 between Italy and Egypt, and 9 between Spain and Algeria. In addition, the scale and methods of agriculture, and its economic and social importance, are markedly different: only 5 per cent of workers in the EU are engaged in this sector, while the share is 40 per cent in Arab Mediterranean countries. Almost three-quarters of poor people in Arab countries live in rural areas, where agriculture is a source of survival.[14] Given the stark differences in development levels and needs between the EU and Arab Mediterranean countries, Arab Mediterranean countries should not be pressured into liberalising their agricultural imports, especially of staple goods, in 'exchange' for enhanced access to EU markets.

Indeed, the Declaration of the Partnership implicitly acknowledges the need for special and differential treatment by stating that '*free trade… and the integration of economies will take into account the respective needs and levels of development*' of participating countries. However, there was no systematic effort to give an operational definition of 'special and differential treatment', i.e. it remains unclear whether this includes longer transition periods for tariff cuts, permanent exemptions, and direct or indirect support basis.[15] Without these special privileges, the poorer countries of the Arab region will not have adequate means to penetrate EU markets, nor the means to meet their food-security needs.

- In the spirit of the Euro-Mediterranean Declaration, the Partnership should adopt and put into operation the concept of special and differential treatment in agriculture. Arab countries should be allowed to retain flexibility to use tariffs and implement safeguards to protect their food-security and rural development needs.

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[13] The case of Lebanon is highlighted in 'Regional Trading Blocks as a Response to Global Poverty: A Critique of the Euro-Mediterranean Agreement', Andrew Mold, Instituto Complutense de Estudios Internacionales, 2002.

[14] Garcia Alvarez Coque and Alexander Sarris, op. cit. 2003.

[15] 'The Euro-Mediterranean Partnership: Unique Features, First Results and Future Challenges, Centre for European Policy Studies, Middle East and Euro-Mediterranean Project', Eric Philippart, April 2003. www.ceps.be/Pubs/2003/MEEMwp10.pdf

This is all the more important as domestic producers in Arab countries cannot be expected to compete with cheap and artificially priced food imports from the EU. Import liberalisation under such unfair trade conditions is likely to be damaging to small producers and their food security. Drawing lessons from the North American Free Trade Agreement, Oxfam's experience with Mexican maize growers suggests that import liberalisation may induce a rapid drop in cereal prices in Arab countries, leading to a substantial loss of income for producers. While poorer urban consumers may benefit from cheaper imports, large losses are likely to be borne by subsistence farmers and poor livestock herders.[16]

Import liberalisation and agricultural subsidies

The Middle East and North Africa region is the single largest importer of food grains in the developing world. Climatic factors, especially water scarcity, combined with the mis-management of the agricultural sector, the inflow of cheap imports, and, in certain cases, civil unrest, have led to a substantial increase in food imports. From the mid-1960s to mid-1980s Algeria increased its dependence on imported cereals from 8 per cent of its consumption to 82 per cent.

Egypt is one of the top destinations for EU wheat, and the second largest market for US wheat exports. In 2000/01, the country imported almost four million tonnes of wheat. The selling price of wheat was less than the cost of production in both the USA and EU.[17] Egypt views export subsidies '*as handicapping domestic production in the net food importers*'.[18] In line with many developing countries, Egypt is advocating the elimination of all export subsidies and trade-distorting support, which create hardships for producers in developing countries.

Market access

Many of the Arab countries feel that the provisions of the CAP, applied to Mediterranean products (fruit, vegetables, olive oil, and cotton), restrict their opportunities to export to the EU. Indeed, one of the recurrent demands of the Arab countries has been greater access

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[16] Experience from other countries suggests that a decrease in tariffs does not necessarily lead to a decrease in food price.

[17] 'Farm-gate: The developmental impact of agricultural subsidies', Tim Rice, ActionAid, August 2002.

[18] At the World Trade Organisation meeting in Cancun (September 2003), Egypt joined the group of developing nations known as G-22, which is calling for developed countries to eliminate all farm subsidies and all forms of trade-distorting support that create hardships for producers in developing countries.

to EU agricultural markets. This has given rise to serious disputes during the negotiations of the trade agreements. Despite regional water shortages, the Arab Mediterranean region has a strong comparative advantage in the fruit and vegetables sector. Syria and Jordan tend to be competitive in livestock, meat, and dairy products, Tunisia in barley, and Egypt in rice.[19]

It is true that a number of Arab products have been granted agricultural trade concessions, i.e. tariff reductions for selected products under quantitative limits. However, in addition to tariffs, the EU also uses a range of measures such as tariff-rate quotas, tariff escalation,[20] entry price system, and product standards and safeguards to protect its agricultural markets. The export potential of Arab countries in both processed and fresh commodities is thus being eroded by the protectionist nature of the CAP: traditionally, this has been the case for Jordanian and Palestinian strawberries, Syrian cotton, Egyptian orange juice, and Arab Mediterranean olive oil.[21] For the Arab Mediterranean countries to become significant net gainers of the agreements, the EU should reduce barriers to its agricultural markets, especially for processed foods. Tariff escalation is largely inconsistent with development efforts to promote value-added activities such as food processing in Arab countries.

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[20] 'Agricultural Trade and Rural Development in the Middle East and North Africa: Recent Developments and Prospects', Dean A. DeRosa, World Bank, 1997.

[21] Tariffs tend to be even higher for processed goods than for fresh commodities. This is an issue that several of the Arab countries have put on the negotiating table, given their comparative advantage in processed goods.

[22] For the Moroccan and Syrian case, see 'Agricultural trade and the Barcelona Process: is full liberalization possible?', Jose-Maria Garcia-Alvarez Coque, *European Review of Agricultural Economics*, Vol. 29:3, 2002, p.399-422. For the Jordan and Palestinian case, see *The Impact of Euro-Mediterranean Partnership on Jordan and Palestine's Agricultural Sectors from a Water Perspective: The Case of Horticultural Exports to EU Markets,* Amer S. Jabari, 2000. According to this study, under the existing agreement, Jordan is allowed to export only 100 metric tonnes of strawberries, whereas the profitable demand *without competing with any other EU producer* is estimated to be about 19,000 metric tonnes. The protection rates for Egyptian juice processing in importing countries are very high, amounting to more than 10 times the protection rates for fresh oranges. For the case of olive oil, see Progressive Policy Institute, 'European Olive Oil Subsidies are Twice the Value of World Olive Oil Trade', 23 July 2003.

- For example, with greater access to EU markets, welfare gains for Egyptian agricultural goods would increase by some 3.3 per cent.[22] The World Bank estimates that export gains for the entire Middle East and North African region could total two billion dollars per year.[23]
- To translate enhanced market access into real gains for poor people, the Arab governments must also ensure that domestic policies extend opportunities to small-scale producers. National policies are needed in order to guarantee income redistribution and markets that work for poor people. Without access to land, credit, market information, and infrastructure, poor people will not be able to benefit from the opportunities created by trade. Policies to promote export-oriented agricultural production should not be pursued to the detriment of policies that promote food security and support the environmental needs of the country.

Sustainability Impact Assessments

After years of promises, in 2003 the European Commission launched a Sustainability Impact Assessment (SIA) 'to obtain independent recommendations on formulation of national and regional policies able to produce the optimal outcome in terms …of sustainable development'. The decision to launch a SIA at last is to be welcomed, as this is an essential starting point in making EU trade policy in the region more sustainable. The region already faces problems such as desertification, soil erosion, loss of bio-diversity, and water shortages. Civil-society organisations are concerned that trade promotion will further jeopardise the quality of the natural environment. However, unless the SIA findings lead to a review of the present agreements and future agricultural protocols, and unless there is evidence that it is influencing EU trade negotiating positions, the SIA will only remain a theoretical exercise.

- The SIA must be integrated into the policy-making exercise, with policy makers and trade negotiators fully engaged in the process, from design to implementation of the results. The SIA should also

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[23] This estimate is based on the EU eliminating all border measures on Egyptian goods over a five-year period. Quoted in Jose-Maria Garcia-Alvarez Coque, op. cit., 2002 .

[24] The World Bank estimates that the entire Middle East and North African region (including non-Mediterranean Arab countries) can gain up to $2 billion a year from improved market access and associated domestic and trade reforms.

be an inclusive process, open to stakeholders, including civil-society organisations.

- The Arab countries should also pass a legal requirement that a Sustainability Impact Assessment be carried out at the national level before further trade reforms are implemented.

Bilateral regionalism and multilateralism

The trade agreements include provisions on services, investment, intellectual property rights, government procurement, and competition policy. The EU must not use bilateral or regional channels of the Euro-Med Partnership to pursue interests that are difficult to obtain through the multilateral trading system, such as the 'Singapore' issues (Investment, Competition Policy, Trade Facilitation, and Transparency in Public Procurement).

Some of the provisions of the Euro-Med agreements have the potential to exceed what is required under the multilateral trading system. In services, for example, the agreements refer to progressive and reciprocal liberalisation of trade in services, consistent with the rules of the World Trade Organisation (WTO) and in particular Article V of the General Agreement on Trade in Services (GATS). The question is whether service-liberalisation measures envisaged under the Euro-Med agreements go beyond the requirements of the WTO. The Arab Mediterranean countries, which are already members of the WTO, made very few commitments under GATS, subjecting only 6 per cent of their service sectors to 'national treatment' and market-access principles. The Euro-Med agreements, however, imply far more stringent requirements for free trade in services.

For example, the agreements with Tunisia, Morocco, and the Palestinian Authority include provisions which could potentially go beyond the requirements of the World Trade Organisation agreement on Trade Related Aspects of Intellectual Property Rights (TRIPS). This agreement stipulates that the countries shall '*provide suitable and effective protection of intellectual, industrial and commercial property rights, in line with the highest international standards*'. The reference to 'highest international standards' points to Intellectual Property Right provisions additional to those laid out in the TRIPS Agreement. The EU should not seek concessions from the Arab Mediterranean countries that go beyond the WTO commitments, unless these are supportive of the Euro-Med's aim of promoting sustainable development in the region.

Conclusion

The stated vision of the Euro-Med agreements is to bring greater stability and prosperity to the region, but this desirable goal will not be realised unless the EU adopts fairer trade rules and practices in its dealings with its Arab neighbours.

Partnership implies that both parties will benefit from closer economic relations in both the short and the long term. As things stand, however, only the EU will benefit significantly in the short term, as Arab countries are forced to open their economies to more competitive and often subsidised European products.

Trade reforms that will have an immediate and negative impact on industrial employment, government revenues, and small producers in Arab countries need to be more equitably designed. In order for this to happen, the partnership agreements need to introduce special and differential treatment of Arab economies, particularly for the agricultural sector that is so crucial to the food security and development needs of poor rural communities.

In order for trade to work for poor people, Arab governments should place poverty reduction at the heart of their national strategies.

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