
DESCRIPTIVE REPORT

BLOCK 1

MEDITERRANEAN PARTNER COUNTRIES AND NEW ACTORS

PROSPECTS OF SUSTAINABLE DEMOCRACY

Main findings

- Tunisia has the most optimistic outlook in terms of democracy, followed by Lebanon and Morocco. Algeria and Syria offer a rather discouraging picture, well below that of the Occupied Palestinian Territories and Libya.
- Views about the role of Islamist parties in the future regional landscape are different in MPCs and EU countries. In the MPCs, Islamist and non-Islamist parties are seen as being equally important while EU respondents consider that the former will have a more relevant role. The same trend prevails when analysing the future role of Salafist parties.
- Free and fair elections are the first choice of respondents when asked to prioritise democracy benchmarks. A second important priority is related to civil freedoms. The independence of the judiciary has almost the same level of priority as the democratic control of the armed forces.
- No major changes are foreseen in the region's foreign policy as a consequence of the Arab Spring. Egypt is seen as keeping its role as an essential broker in the region.

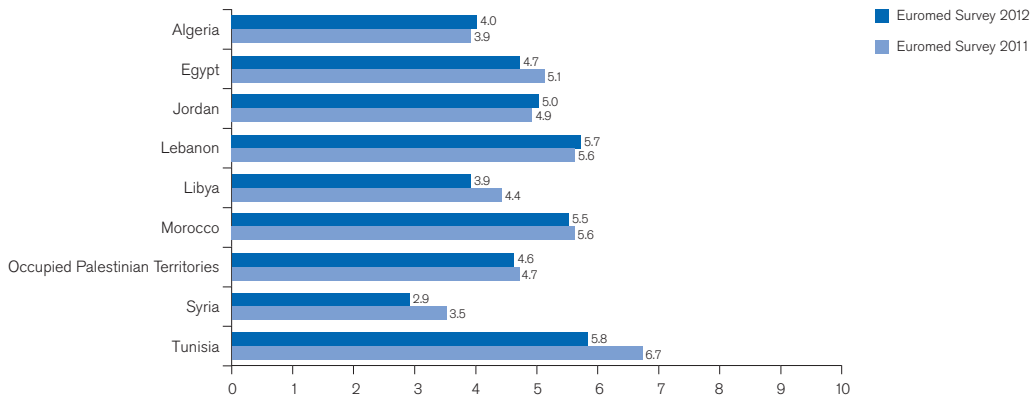
The Survey begins with a question about the progress of democratisation in the region, an issue also included last year, and asks respondents to assess the probability of sustainable democracy in Arab Mediterranean countries.

The results on the probability of deep and sustainable democracy in these countries reveal three defined blocks of countries. Firstly, Tunisia, Lebanon and Morocco, which respondents consider as most likely to have democratic solidity and stability. Secondly, Egypt, Jordan and the Occupied Palestinian Territories form the central group on this scale of probability, showing that respondents as a whole are unclear about whether these countries will advance towards deeper democracy. Thirdly, Algeria and Libya are considered as countries where the prospects of deep and sustainable democracy are not seen as very likely. Finally, Syria deserves a mention apart as it is assessed far below these countries with results determined by its current conflict.

In comparison with the results of the previous Survey (see Graph 12) we should note that the view of respondents on each country has worsened or, at best, has remained unchanged. Thus, the assessment of the prospects of sustainable democracy in Tunisia continues to be the highest but the average has decreased by almost one point from one year to the next (from 6.7 to 5.8). The other countries that have experienced a decrease in grades are Egypt, Libya and Syria. In other words, countries that last year were in transition processes and where the development of events in recent months can explain this worse assessment.

Graph 12: Assessing the prospects of deep and sustainable democracy.

Comparing 2011 and 2012 results (average on a scale of 0-10, where 0 stands for very improbable and 10 for very probable)



Source: Compiled by the IEMed based on the results of the 3rd and 4th Euromed Survey

The results by country show significant differences according to the type of respondents, especially when examining them according to their geographic origin. In the responses from Israelis we see a constant that will be repeated: greater scepticism when assessing the development of deep and sustainable democracy in Arab countries. It is also notable that for all countries respondents make a more optimistic assessment of the development of democracy in their respective countries. On the other hand, Maghreb respondents express significant optimism in their views about Algeria, Morocco and Tunisia (determined by assessments of their own countries) as well as Lebanon and the Occupied Palestinian Territories. Responses from the Mashreq are less optimistic and tend to assess the prospects of sustainable development of democracy in southern Mediterranean countries below the average.

It should be noted that Tunisia is considered to have the greatest probability of deep and sustainable democracy. European and Arab respondents coincide in their outlook with very similar grades that determine the overall average (5.8). By type of institution there is also a notable difference between political actors (more optimistic) and experts (more pessimistic) in a trend which has been repeated (with some variation) in the remaining countries surveyed.

In contrast, Syria obtains the worst results; the confidence in a high probability of development is not even shared by Syrian respondents themselves who, although they do not reach an average of 5 (4.5), nevertheless consider it more likely than the overall assessment.

The process has started. Return is unavoidable but reaching the sustainability level will differ according to each country and most probably the ideal level will surely take some generations.

Turkish respondent

Même avec les derniers événements dans les pays arabes la démocratie reste improbable. S'il y aura une démocratie ça sera dans plusieurs années, pas dans l'immédiat. L'anti-démocratie est une culture dans les pays arabes.

Algerian respondent

This needs to be monitored in the following years, as one cannot expect a deep and sustainable democratisation process just after a “revolution”, whatever you call revolution. Studies show that the Arab societies have engaged in a slow but deep modernisation process (demographic indicators, qualification rate, etc).

Luxembourger respondent

Political Actors' Role

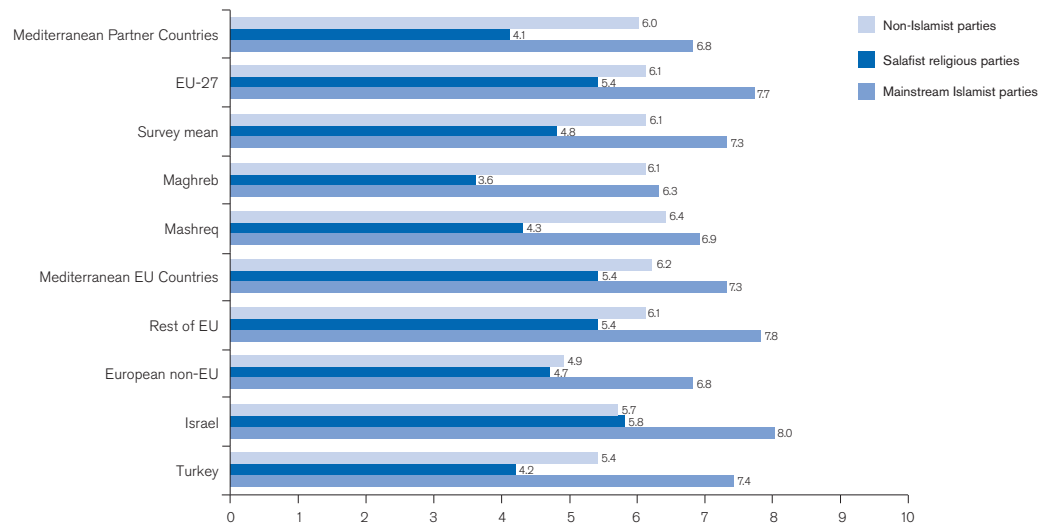
In the second place, the Survey seeks views on the role that mainstream Islamist, Salafist and non-Islamist parties will have in the future.

At a general level, we see two outstanding trends. On the one hand, EU respondents tend to believe that the role of Islamist parties will be more important than respondents from southern Mediterranean countries. On the other hand, we observe that the political or regime’s instability is considered a factor that means that Salafist parties are seen as having a role in the future of these countries.

Looking at the assessments, we see that respondents as a whole consider that Islamist parties will play the most important role (7.3) along with non-Islamist parties (slightly less important, 6.1), while the role of Salafist parties will be less important in the future (4.8).

The results by origin of respondents show some significant variations (see Graph 13). In the case of Islamist parties it is notable that European respondents, along with Israelis and Turks, consider that these parties will have an important role while those from the Mashreq and especially the Maghreb see it as less relevant (although always with a high assessment).

Graph 13: Expected role of the following political actors in the future Mediterranean landscape
(average on a scale of 0-10, where 0 stand for negligible role and 10 for key role)



Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

This trend increases when assessing the future role of Salafist parties. In this case, Europeans and Israelis attach the greatest importance to them, above 5, followed by Mashreq and Maghreb respondents, who consider that their role will be less important (3.6). Moreover, Turkish respondents are an exception here as, in contrast to the previous questions, they make one of the most negative assessments. As for Islamist parties, the previous distribution is not repeated given that both Maghreb and Mashreq respondents achieve grades very similar to the average (see Graph 13).

The analysis should be dynamic. Mainstream Islamist parties in three years time will not be what they are today, whether or not they are then in power. Most likely, they will partly adapt to rules of the international system. One reason is that Arab Mediterranean countries are integrated in the Euro-Mediterranean and the largest international systems and need them. Non-Islamist parties and groups are establishing linkages with each other. The Mediterranean landscape is essential to them. As for Salafists, they are still groping in their international relations: they do not yet know how to deal with the outside world.

Egyptian respondent

Les partis islamistes dominants et religieux salafistes joueront un rôle clé dans le futur paysage politique méditerranéen surtout avec le soutien (financier) qu'ils reçoivent des pays pétroliers et le soutien des classes pauvres, mais l'esprit de démocratie et de révolution incitera les partis non islamistes à jouer un rôle aussi important en opposition à ces partis.

Tunisian respondent

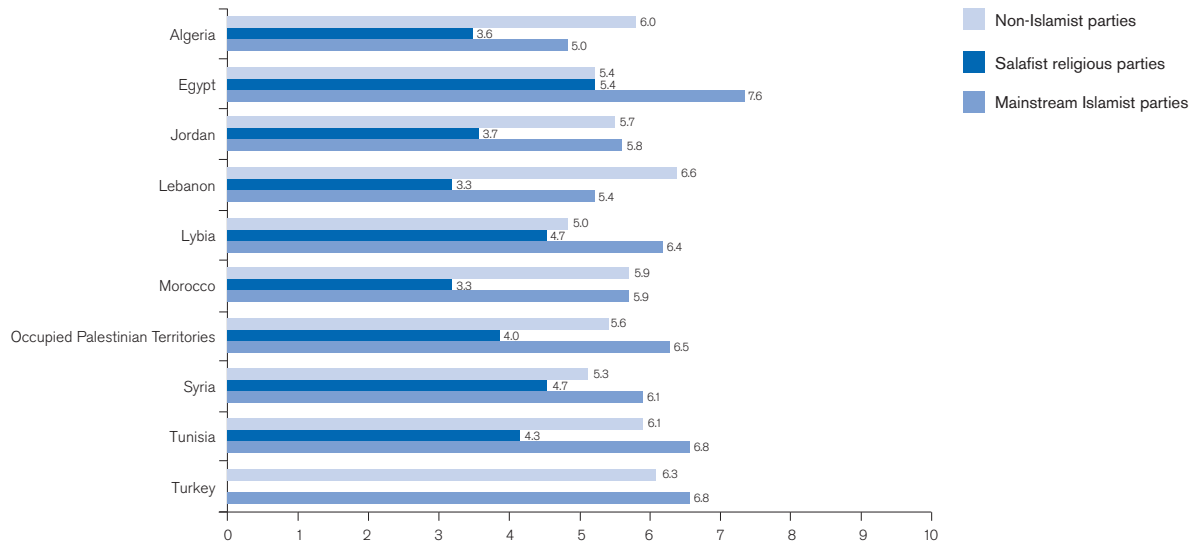
Turkey is an example of how mainstream Islamist parties can change the entire scope of the political balance. Others are likely to follow AK Parti as a role model to achieve power. Salafists, backed by Saudi government, do not seem to have enough support to achieve power. North African societies are not fond of the Saudi system. Non-Islamist parties are likely to stay as active participants in the political system.

Turkish respondent

When looking at each of the countries, these responses vary substantially (see Graph 14). Thus, in countries such as Lebanon or Algeria respondents consider that non-Islamist parties will play a more important role than Islamist parties while in countries such as Egypt, Tunisia, Turkey, Libya, the Occupied Palestinian Territories and Syria the role of traditional Islamist parties is more positively assessed than non-Islamist parties. In other countries such as Morocco or Jordan both types of parties receive a very similar assessment. On the other hand, Salafist parties are only considered as actors that will play a moderate role in the future of countries such as Egypt, Tunisia and Libya.

Graph 14: Expected role of the following political actors in the future Mediterranean landscape

(average on a scale of 0-10, where 0 stands for negligible role and 10 for key role)



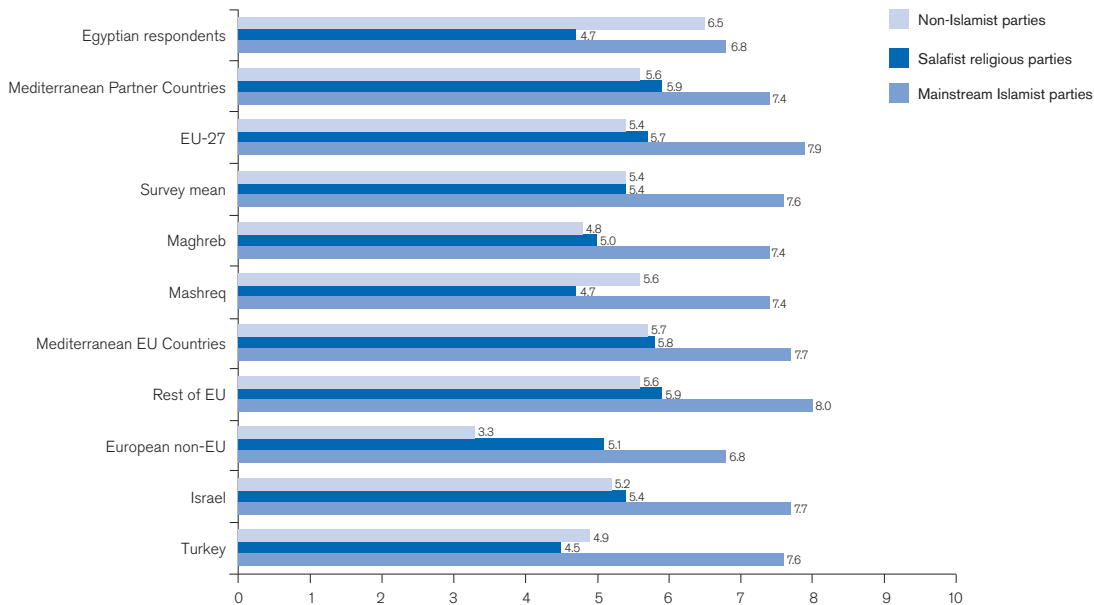
Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

In the case of **Algeria** we have already mentioned that non-Islamist parties can play a more outstanding role than mainstream Islamist parties and considerably more than Salafist parties. When analysing the results by origin of the participants we see how they mainly correspond to Maghreb respondents (and Algerian respondents themselves) and are therefore those who consider that non-Islamist parties will have a more relevant role than Islamist and Salafist parties. Mashreq respondents provide an almost equal assessment of the role of Islamist and non-Islamist parties and similar to the average for Salafist parties. As happened in the general question, Europeans and Israelis attach more importance to the future role of Islamist parties in Algeria than southern respondents, especially those from Mediterranean EU countries, and also to Salafist parties. The view of Turkish respondents is similar to that of Europeans and Israelis except in relation to Salafist parties which, according to them, will have very little importance in future Algerian politics.

For **Egypt** the results are very different: mainstream Islamist parties will (according to respondents) play a very important role in the future of the country (7.6 on average, the highest of all countries, see Graph 15). This high assessment is common to all respondents. Regardless of their origin, the differences are minimal although 8.0 on average by non-Mediterranean Europeans stands out as the highest assessment and 6.8 by Egyptians as the lowest. All respondents give the same grade to the role of non-Islamist and Salafist parties, 5.4. However, the distribution by origin reveals small differences in the distribution of the results. While European respondents tend in both cases to make high assessments, Israelis give assessments very similar to the average, Maghreb respondents slightly below the average and Turks the lowest of all (especially in the case of Salafist parties). The main difference lies in the behaviour of Mashreq respondents as, although they attach greater importance to the role of non-Islamist parties, in the case of Salafists their assessment is one of the lowest. These results seem clearly determined by the behaviour of Egyptian respondents as they have the highest average (6.8) when assessing non-Islamist parties and one of the lowest in the case of Salafist parties.

Graph 15: Expected role of the following political actors in Egypt

(average on a scale of 0-10, where 0 stands for negligible role and 10 for key role)



Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

As for **Jordan**, traditional Islamist parties and non-Islamist parties obtain very similar grades (5.8 and 5.7) but, while in the case of non-Islamist parties there are very few differences depending on the origin of respondents and only Turkish respondents differ from the average with a much lower assessment (below 5), the assessment of Islamist parties is highly varied. While Mashreq respondents have the highest grade (6.6), Maghreb respondents have the lowest (5.1), a very significant difference between the two groups. Europeans and Turks maintain their trend to grades very similar although slightly above the average while Israelis have lower grades. The assessment of the role of Salafist parties in Jordan is very low (3.7). The distribution by geographic areas follows a pattern similar to the general question: respondents from Arab countries and Turkey provide the lowest grades while those from the EU and Israel provide the highest.

In the case of **Lebanon**, the future role of non-Islamist parties is more positively assessed than that of Islamists while the role of Salafist parties is considered almost negligible. All the groups of origin coincide in their assessment of the non-Islamist parties and the differences between them are minimal. We should only point out that Turkey and Israel provide the lowest grades while the highest corresponds to Mashreq respondents. However, in the assessment of the role of traditional Islamist or Salafist parties there are significant differences between the different groups. In a trend already observed for other countries, it seems that there is a North-South division in the opinion of the future role of these parties. Thus, Maghreb and Mashreq respondents consider that their role will be far less important than what EU respondents believe (whether Mediterranean or not). This distribution is applicable both to traditional Islamist and Salafist parties, although with a difference of assessment of each type of party. Israeli respondents are closer to European opinions while Turks assess the Islamist parties like the Europeans but have a lower opinion of the role of Salafist parties.

Libya has results among which the highest assessment of the role of Salafist parties (in comparison to other countries) stands out, almost at the same level as non-Islamist parties. The distribution by areas of origin of respondents shows a similar structure for all four main groups (Maghreb, Mashreq, Mediterranean EU and the rest of the EU). In the three types of parties, Europeans make a higher assessment than the average while Arab respondents are below the average. Notable among these results is the low assessment of Salafist parties by Mashreq respondents in comparison to those of the Maghreb, who are closer to the average. In fact, Maghrebians assess the Salafist and non-Islamist parties almost equally. Respondents of Turkish origin assess the role of non-Islamist and Salafist parties below the average and traditional Islamist parties above it.

The case of **Morocco** is an example of a country in which Islamist and non-Islamist parties are seen as having a similar future role while respondents consider Salafist parties to be of little importance. The results show that respondents from the Mashreq, the Maghreb and Mediterranean EU countries attach less importance to Islamist parties than to non-Islamist parties while non-Mediterranean Europeans, Israelis and Turks make the opposite assessment, the latter with a very low assessment of the role that non-Islamist parties may have (4.5). As for Salafist parties, we see again the trend previously mentioned: European and Israeli respondents consider that they will have a more important future role in comparison to Mashreq, Maghreb or Turkish respondents (this group stands out for the very low assessment by Moroccan respondents of the role of Salafists in the political future of Morocco given that over 60% of them give a grade of 2 or below).

The **Occupied Palestinian Territories** follow the general pattern applicable to all Arab Mediterranean countries: a greater role for mainstream Islamist parties followed by non-Islamist parties while Salafist parties achieve less than 5 for their future role. The distribution by area of origin of the results of mainstream Islamist parties reveals few differences although it does show the trend already observed of EU respondents attaching greater importance than Maghreb and Mashreq respondents. The results for non-Islamist parties stand out above all for the high assessment by Palestinian and Israeli respondents, above the average for traditional Islamist parties. Finally, it is also significant that Maghreb respondents make assessments slightly lower than the average and Turkish respondents assess these parties far below the average, with grades under 5. As for Salafist parties, the low grade given by Mashreq respondents (especially Palestinians) and the high grade (compared with the other groups) provided by Mediterranean EU respondents stand out. From the remaining groups it is also worth noting the low significance that Israelis attach to these parties in the future of the Palestinian territories.

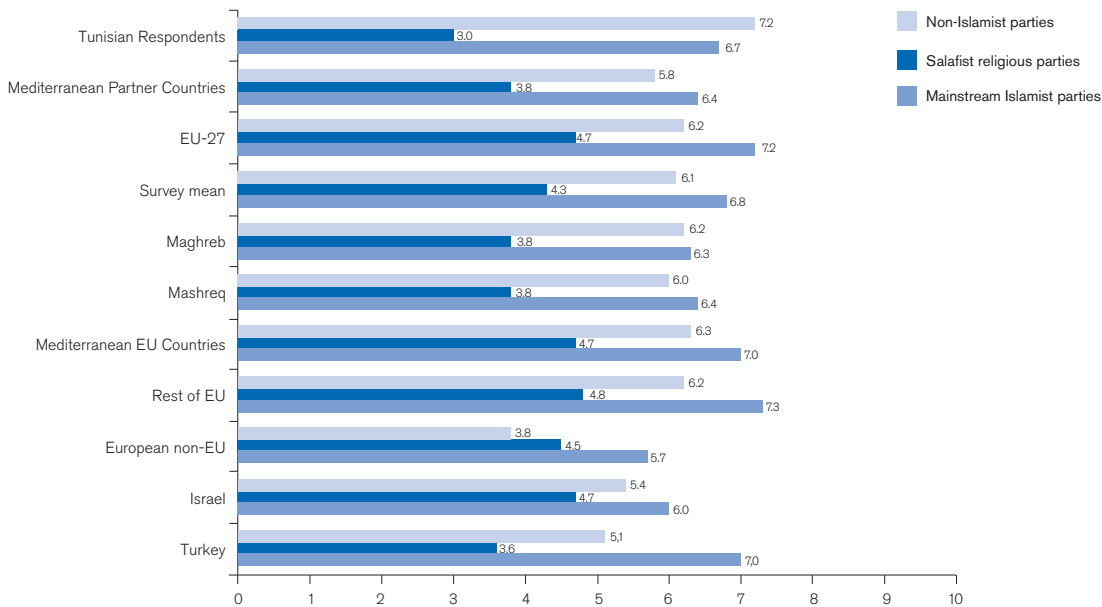
The overall results on **Syria** stand out for the high assessment of the future role of Salafist parties (4.7) and the few differences between the three types of parties. Also notable in the results by area of origin is that Europeans assess the role of traditional Islamist parties and Salafist parties in comparison to Maghreb and Mashreq respondents following a trend similar to other countries. As for non-Islamist parties, there are fewer differences by origin although Mashreq countries stand out with the highest assessment while those of the Maghreb give the same grade as the overall average.

Tunisia is a country in which the results reveal that all parties have achieved grades among the highest (each one in comparison to the results obtained in other countries, see Graph 16). The assessment of Islamist parties again reveals the trend to a more positive assessment by EU and Turkish respondents and more negative by Maghreb and Mashreq respondents and Israel. In the assessment of non-Islamist parties these differences are not seen in the main territorial groups as they achieve grades very similar to each other. Only Israel and Turkey have significantly low grades while Tunisians express the importance of the future role of non-Islamist parties (above their assessment of the role of Islamist parties). For Salafist parties, the trend is maintained, as in other countries, of Europeans and Israelis seeing them as having a

greater role and Maghreb, Turkish and Mashreq respondents as having a lesser role (especially by nationals of these countries, in this case Tunisians).

Graph 16: Expected role of the following political actors in Tunisia

(average on a scale of 0-10, where 0 stands for negligible role and 10 for key role)



Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

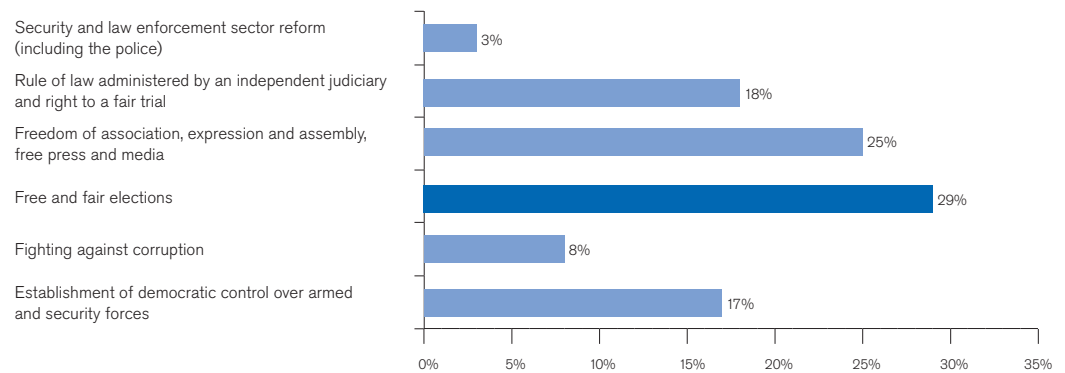
Finally, this block of questions also asks about **Turkey**, although in this case only about traditional Islamist and non-Islamist parties. The results in general denote a view of an important future role for both types of parties although slightly higher in the case of Islamist parties. By origin of respondents, it is notable that Europeans assess the role of non-Islamist parties slightly more positively than Arab Mediterranean respondents and that in terms of Islamist parties, non-Mediterranean Europeans assess them more positively while Maghreb respondents assess them less positively (Mediterranean European and Mashreq respondents have similar grades closer to the average). Two other aspects stand out from the results: on the one hand, the view of Turkish respondents who make almost the same assessment of the role of both types of parties and, on the other, the very positive view by Israeli respondents of the role that Islamist parties will play in Turkey in contrast to non-Islamist parties, which they assess far more negatively.

Priorities in the First Stages of Implementation of New Constitutions

The following question asks respondents to rank by priority of implementation six benchmarks related to deeper and more sustainable democracy within the framework of the new constitutions.

The results for respondents as a whole clearly show how the priority focuses on three of these benchmarks while three others make up a block of lower priority benchmarks (see Graph 17). Free elections and freedoms are the two priority benchmarks for respondents as a whole with very few differences followed by the rule of law and independent judiciary and democratic control over the armed and security forces just below the two previous benchmarks. The block of the two lowest priority benchmarks is formed by the fight against corruption and the reform of the security sector.

Graph 17: Benchmarks that should be prioritised in the first stages of the implementation of new constitutions. Answers as first priority (in %)



Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

The results by origin of respondents or by type of institution do not show great variations in terms of the two main blocks mentioned although there are small differences, especially in the results according to geographic origin. For respondents from Mediterranean EU countries, the two priority benchmarks coincide with the overall average (elections and freedoms) just like the two lowest priority benchmarks (corruption and reform of the security sector). However, for these respondents we should mention the existence of an intermediate block given that the rule of law and control over the armed forces have similar results (closer to each other than to the other blocks). This structure of results is repeated by respondents from the rest of the EU although it is significant that they consider any kind of fight against corruption as a lower priority.

However, Turkish respondents do correspond to the structure of two blocks of the Survey as a whole and practically with the same ranking between the different benchmarks (although free elections stands out slightly as the highest priority), while Israelis also feature two blocks according to the priority of the different benchmarks. However, in this case there is an additional benchmark in the highest priority block: democratic control over the armed forces. This features grades very similar to the rule of law and free elections, albeit a little below the first priority of Israelis: freedoms.

In the two main blocks of the MPCs there are also significant differences. Mashreq respondents do not distinctly prioritise one benchmark over another given that the different options are graded very similarly. Notable among the results of these respondents is how the fight against corruption is considered the lowest priority. Moreover, Maghreb respondents give more priority to the rule of law and free elections, followed very closely by two more benchmarks: freedoms and the fight against corruption, with very similar grades. The different outlook of corruption between both Arab countries is significant. Finally, Maghreb respondents consider the implementation of democratic control over the armed forces and the reform of the security sector as a lower priority.

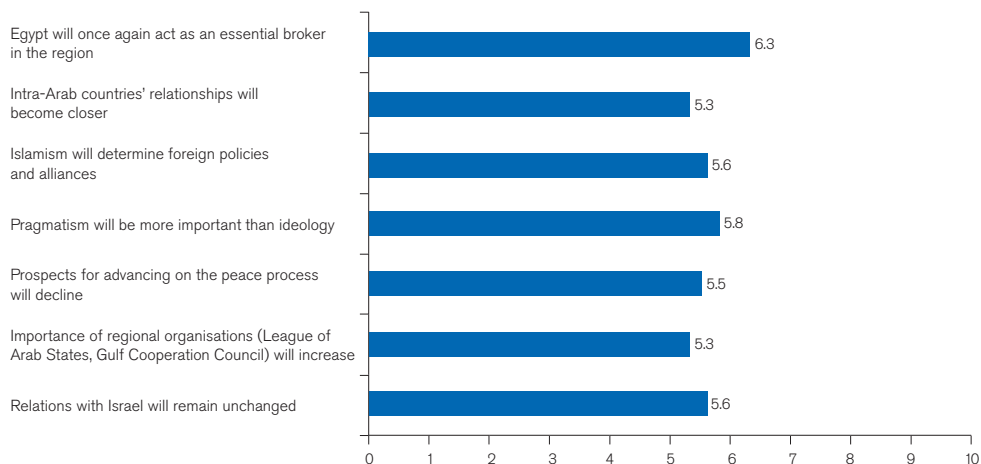
Reshaped Foreign Policy

As for Question 4, respondents believe that the probability that the new actors and new constitutional frameworks will entail a modification of MPC foreign policy in the region is quite high (6.3 on average). Curiously, there are practically no differences according to the place of origin of respondents with grades very close to the average, with the exception of Israeli respondents who are more sceptical than the rest in relation to this probability.

In this context, the question is complemented with the assessment by the respondents of the probability that a series of situations related to the foreign policy of the countries will take place (see Graph 18). The results of all respondents show that all these hypotheses are considered “somewhat” likely but without much variation as the results range from 5.3 on average for the statements on the strengthening of intra-Arab relations or the increase of the importance of regional organisations to 5.8 for pragmatism to be more important than ideology or 6.3 for Egypt being essential again in the region, while the other three statements are placed around 5.5.

Graph 18: Reshaped Mediterranean Partner Countries’ foreign policies in the region: Egypt will once again act as an essential broker in the region

(average on a scale of 0-10, where 0 stands for no probability and 10 for very high probability)

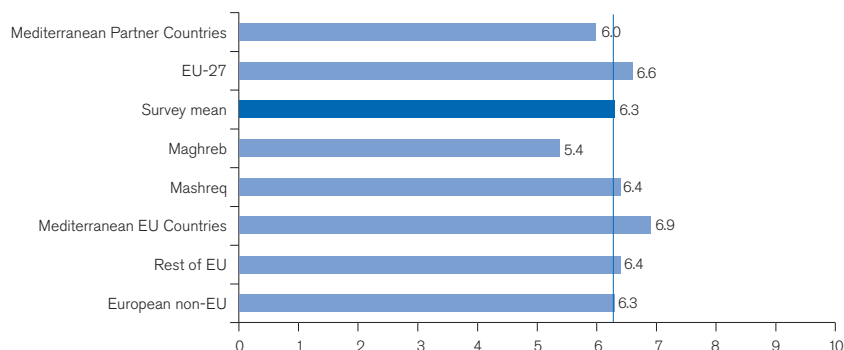


Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

Observing the results of these questions according to the origin of respondents provides a little more insight into the probability that these hypotheses will take place. In this respect, for the statement that Egypt will recover its essential role in the region (see Graph 19) it is notable that Maghreb respondents consider it the most unlikely (5.4) while those from Mediterranean EU countries consider it the most likely (6.9). The remaining groups feature grades very close to the overall average. As for whether the relations between Arab countries will be strengthened, it is highly significant that respondents from Arab countries attribute to it a lower degree of probability (along with Israelis) while Europeans (mainly from Mediterranean countries) see it as more likely (although without distancing too much from the average).

Graph 19: Reshaped Mediterranean Partner Countries’ foreign policies in the region: Egypt will once again act as an essential broker in the region

(average on a scale of 0-10, where 0 stands for no probability and 10 for very high probability)

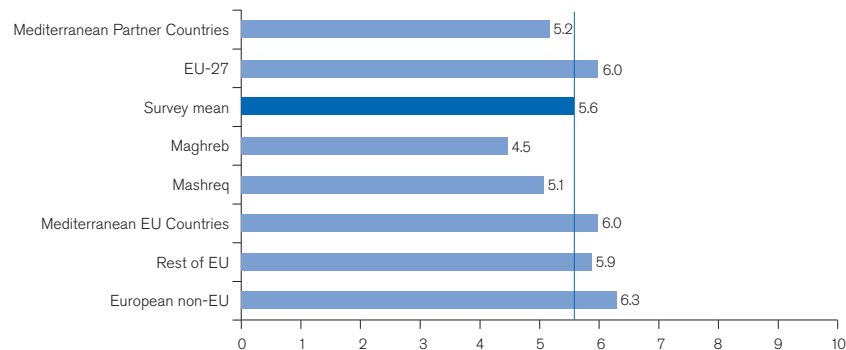


Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

This trend is repeated in relation to the probability that Islamism will determine the foreign policies and alliances (see Graph 20). Arab Mashreq respondents, but above all those from the Maghreb, have the lowest grades (5.1 and 4.5, respectively), while EU respondents (Mediterranean or not) believe that the probability will be higher (6.0 and 5.9, respectively), although Israelis have few doubts that Islamism will determine the foreign relations of these countries (70% grade it above 5, with an average of 6.9).

Graph 20: Reshaped Mediterranean Partner Countries' foreign policies in the region: Islamism will determine foreign policies and alliances

(average on a scale of 0-10, where 0 stands for no probability and 10 for very high probability)



Source: Compiled by the IEMed based on the results of the 4th Euromed Survey

The hypothesis that pragmatism will be more important than ideology was considered one of the most probable by all respondents. The results by groups of origin show that there are few differences between them with grades close to the average in all cases. In any case, it seems that there is a slight trend to considering this hypothesis as more likely among Arabs than among Europeans, although with minimal differences. These minimal differences also exist in the probabilities that there is progress in the peace process. The large groups concentrate on grades close to the average; only Maghreb respondents are slightly distanced and consider this option as less likely. In contrast, it is once again the Israelis who differ from the average and consider it much more likely than the rest of the respondents.

There are more differences between groups in the questions on the statement that there will be a growth in the importance of regional organisations such as the Arab League or the Gulf Cooperation Council. In this case, the most directly involved – Maghreb, Mashreq and Israeli respondents – have the lowest grades, while Europeans and Turks have the highest. Finally, on the statement on relations with Israel remaining unchanged, those who consider this more likely are from the Mashreq (6.3), slightly above Europeans and Turks, while Israelis themselves (although very close to the average) and, above all, Maghrebians consider it very unlikely.

