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# DESCRIPTIVE REPORT

# DOMESTIC AND GEOPOLITICAL CHANGES IN THE EUROMED REGION

## DOMESTIC CHANGES IN THE REGION

### Main findings

- The assessment of political, social and economic elements shows a clear contrast between the negative evaluation of the most recent past and the openly positive view, when asked to think prospectively.
- The rule of law and good governance and freedom of expression and press are widely regarded as having improved, while the optimism is more moderate about the relation between civilian and military power and improvement in the level of corruption.
- In the forward-looking assessment, a constant element is the trend for responses from the Maghreb to be more positive. In contrast, responses from Turkey and Israel tend to be more negative, often above the average for the sample.
- There is a persistent difference between the opinion of respondents on a specific country and what participants say about their own country. Generally, they are considerably more critical about their own country.
- Palestine: looking at the opinion expressed by those in the country itself, it is notable that the rule of law and governance obtain more nuanced results. The assessments of deterioration or improvement are not as acute as in the average of countries in the region.
- For Libya and Syria, the general trend of forward-looking responses is negative, in contrast to the other countries in the region.

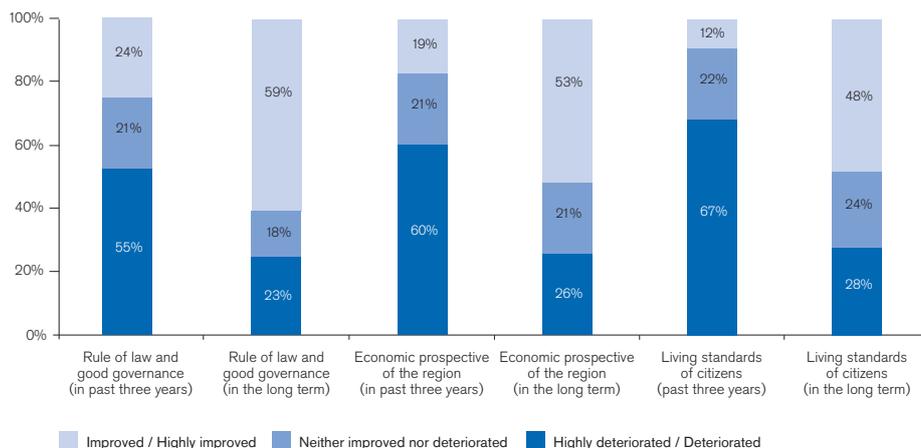
The first block of the Survey aims to take the pulse of the changes in governance and in the socioeconomic policies of the Southern Mediterranean countries by asking about their past and future. In this block there are also questions about the impact of the international actors in the region as well as the consequences of the war in Syria.

Question B.1 and B.5 of this first block are complementary, as the first asks for an assessment of the evolution over the last three years of a series of political, social and economic elements that have been affected by the Arab uprisings. The second asks for an opinion from a long-term perspective about these same elements.

The most outstanding characteristic is the contrast between the negative assessment of the most recent past and the openly positive view of most of these elements, when asked to think prospectively.

As can be seen in graph 11, the three elements considered to have deteriorated most will, according to respondents, have a more optimistic horizon, looking at their possible evolution in the long term. This is a notable factor as it involves prospects for governance (rule of law and good governance) and improvement in the economic situation both from the point of view of people (living standards of citizens) and on a regional level (economic prospective of the region).

**Graph 11: Comparing the improvement or deterioration in the past three years and in the long term: 3 most deteriorated elements**



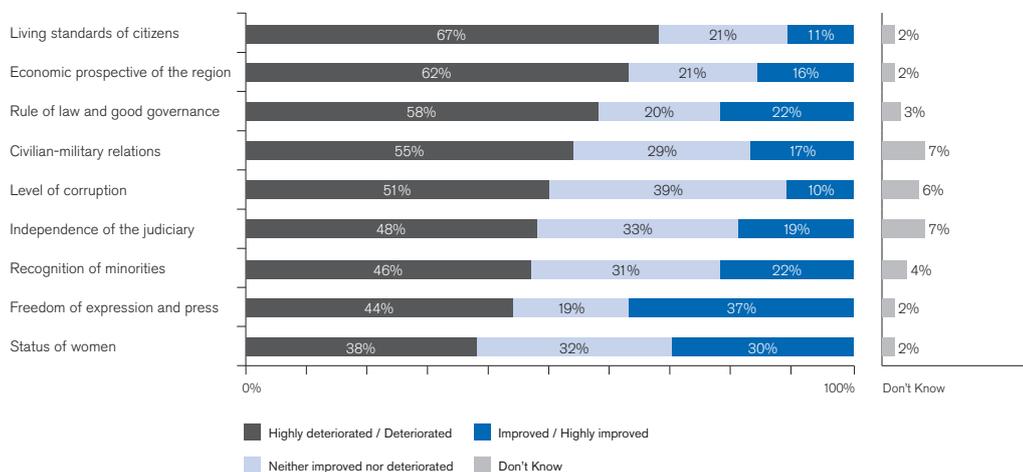
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

The two elements that have most deteriorated in the last three years are related to economic development, where over 60% of responses are negative, followed by governance-related elements: rule of law, relations between civilian and military power, and level of corruption. Over 50% of responses consider that there has been a notable deterioration in these fields.

Graph 12 clearly indicates the view of respondents: no element has improved in the last three years. But if we look at those considered to have deteriorated less, we see aspects related to civil liberties such as freedom of expression and press, and the status of women. Here we see the smallest difference between responses that indicate deterioration and those that indicate improvement.

**According to the respondents, economic development and governance-related elements have deteriorated most and civil liberties less in the last three years.**

**Graph 12: Assessing the improvement or deterioration in the last three years, in the SOUTHERN MEDITERRANEAN REGION**



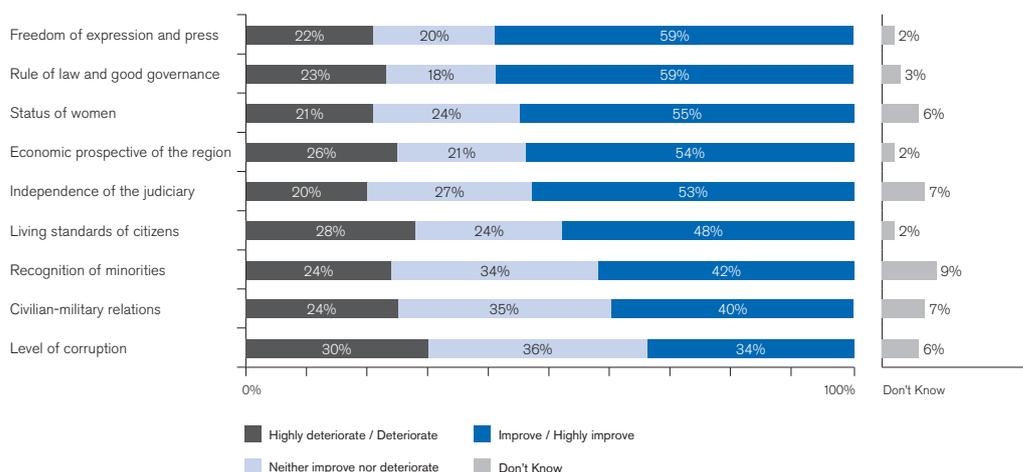
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

## Changed trend in the long term

**The highest prospect for improvements in the long term is for the rule of law and good governance and freedom of expression and press.**

The highest prospect for improvements is for non-economic elements (see graph 13). The greatest forward-looking responses see a scenario of improvement in two notable elements of the Arab Spring, the rule of law and good governance and freedom of expression and press, while there is more moderate optimism in terms of the relations between civilian and military power, as well as improvement in the level of corruption.

**Graph 13: Assessing the improvement or deterioration in the long term, in the SOUTHERN MEDITERRANEAN REGION**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

Analysing the aforementioned elements one by one, we see a fairly homogeneous assessment if we compare the responses of the 838 participants with the responses distributed by EU-28 and EMP countries, or by groups of countries: EU Mediterranean countries, Maghreb and Mashreq. A constant element is the trend for responses from the Maghreb to be more positive. In contrast, responses from Turkey and Israel tend to stress the negative assessment, often considerably above the sample average (see detailed results in Annex IV, Set of Results).

## Assessing governance in the last three years

**Assessment of development of four fields of governance in the last three years is rather negative, but the forward-looking view is much more optimistic.**

The four elements on governance assessed in the Survey follow the pattern of negative assessment over the last three years, while there is a degree of optimism about improvement in governance in the long term.

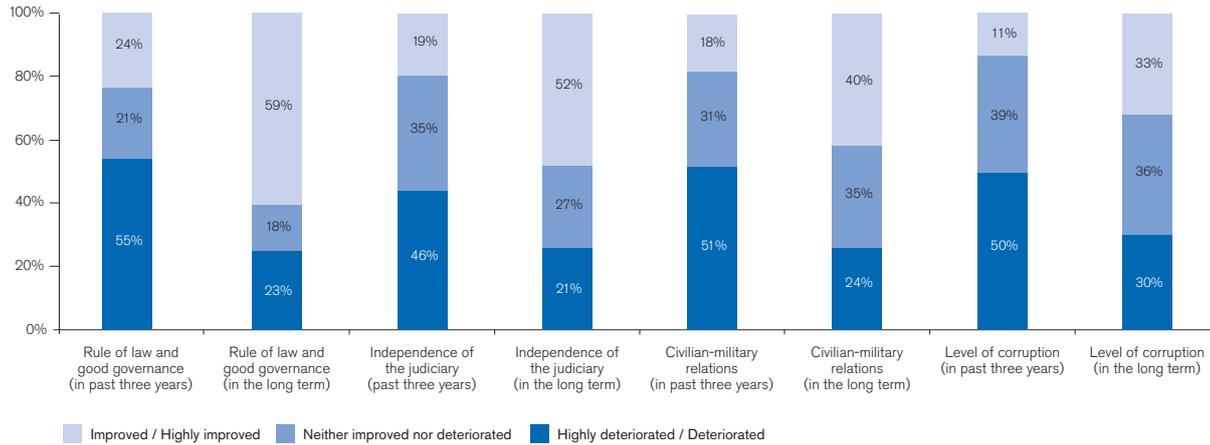
It is notable that the four fields of governance<sup>1</sup> have evolved quite negatively, with over 50% (except for independence of the judiciary with 48%) of responses assessing it as highly deteriorated/deteriorated. The forward-looking analysis is more heterogeneous but its common strand is a positive view of its future development, above all for the rule of law and good governance and independence of the judiciary. To a lesser extent, there is some confidence in an improvement in level of corruption.

Moreover, except in the case of corruption, a more than notable 20% of respondents consider that there has been an improvement in these elements, which are useful for us to describe the governance of the countries analysed (see graph 14).

1. Rule of law and good governance, independence of the judiciary, civilian-military relations, and level of corruption.

Another constant in this assessment lies in the difference between the opinion of respondents as a whole about a specific country and participants' opinion of their own country. Generally, there is a considerably more critical view from the country itself than the overall opinion of it.

**Graph 14: Comparing the improvement or deterioration in the past three years and in the long term on governance elements**

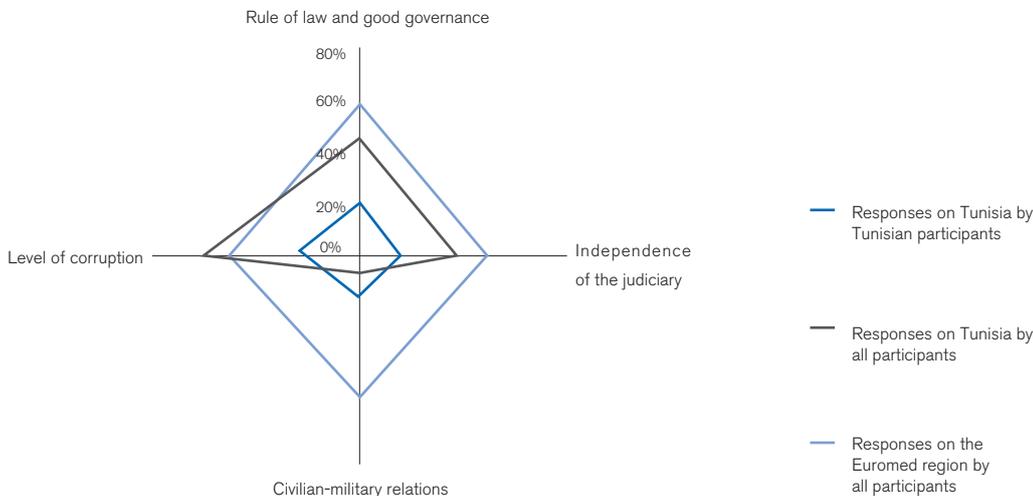


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Focusing on country specificities

After these assessments, we must examine the results by countries, which explain these variations. If we look at Tunisia and Egypt, which have been at the centre of the most outstanding changes in the last three years, we see in the case of Tunisia that the overall assessment is quite positive, as responses indicating a deterioration of governance are considerably below the Survey average. It is also indicative to see how the perception of Tunisians themselves is not as optimistic in this assessment, emphasising the deterioration of corruption.

**Graph 14.1: Comparing the improvement or deterioration in the past three years on governance elements: Euromed region and Tunisia** (% of answers considering that the following elements have deteriorated or highly deteriorated)



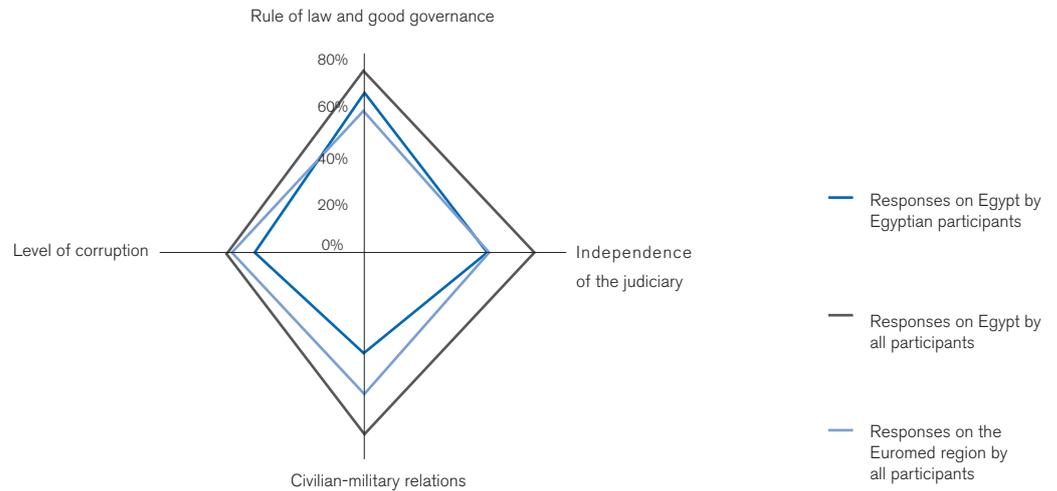
**The overall opinion about the changes in Tunisia in the last three years is quite positive.**

Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**Developments in Egypt in the last three years are generally evaluated negatively.**

The results for Egypt reflect a general deterioration, considerably above the average, and only the opinion of Egyptians themselves shows a slightly more positive assessment, except in the case of rule of law and good governance.

**Graph 14.2: Comparing the improvement or deterioration in the past three years on governance elements: Euromed region and Egypt** (% of answers considering that the following elements have deteriorated or highly deteriorated)

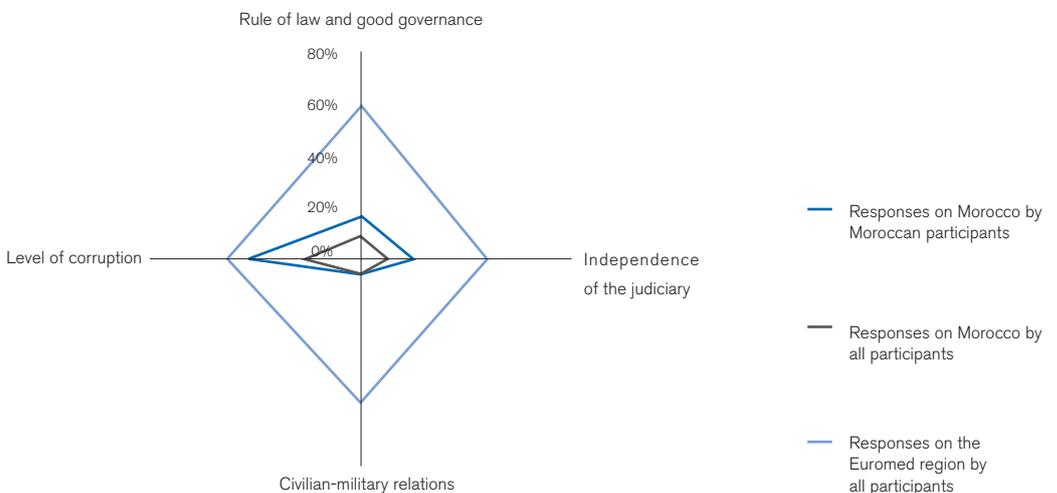


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**In case of Morocco and Jordan, the level of corruption is considered to have deteriorated most in the past three years.**

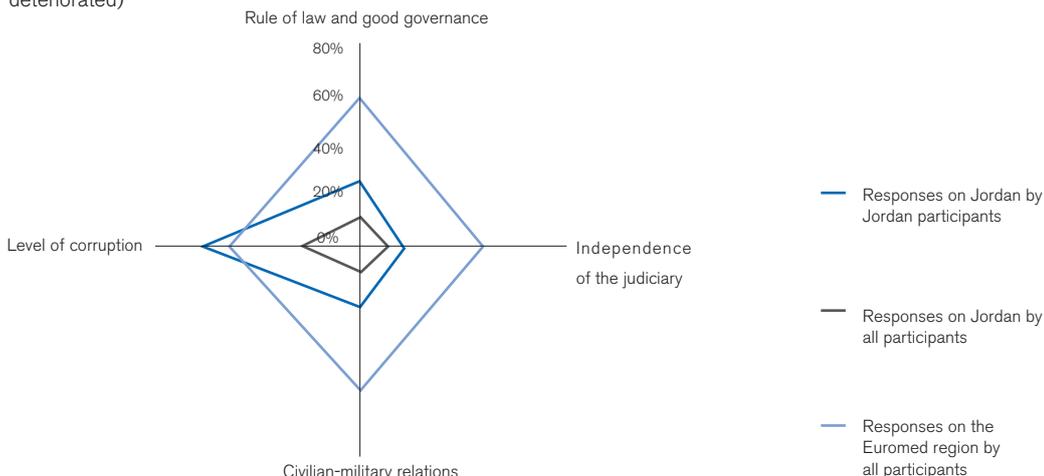
Focusing the analysis on countries that have undertaken political reforms in the context of regional changes, anticipating potential citizen demands and mobilisations, we see in the case of Morocco and Jordan a similar pattern to that of Tunisia; that is, the country is assessed less negatively than the Survey average, but in these cases the nationals of the country themselves do not have such a positive view. In both cases, the level of corruption has notably deteriorated.

**Graph 14.3: Comparing the improvement or deterioration in the past three years on governance elements: Euromed region and Morocco** (% of answers considering that the following elements have deteriorated or highly deteriorated)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**Graph 14.4: Comparing the improvement or deterioration in the past three years on governance elements: Euromed region and Jordan** (% of answers considering that the following elements have deteriorated or highly deteriorated)

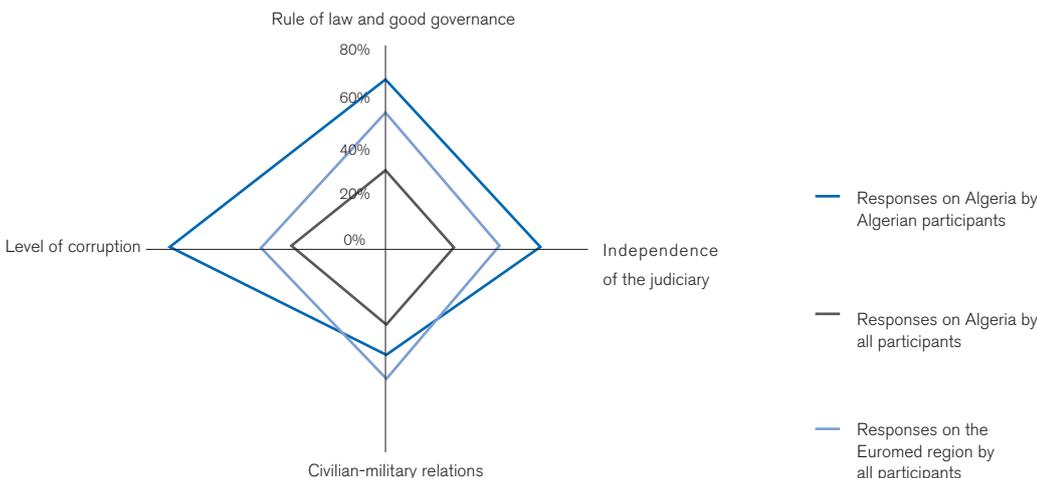


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

Finally, in countries that have not carried out reforms, as in the case of Algeria, Algerians themselves are most negative, while the assessment of the country is considerably less negative and remains below the Survey average.

**Algerians assess developments in their country much more negatively than the rest of respondents.**

**Graph 14.5: Comparing the improvement or deterioration in the past three years on governance elements: Euromed region and Algeria** (% of answers considering that the following elements have deteriorated or highly deteriorated)

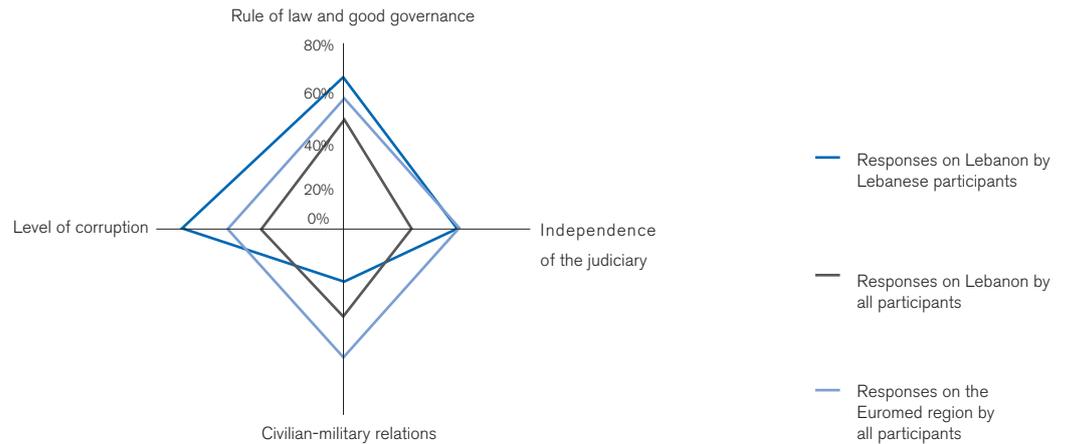


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

The results for Lebanon, despite the great complexity of variables to take into account, are comparable to those of Algeria, where the perception of the country is better than the regional average, while Lebanese respondents particularly emphasise deterioration in the level of corruption. The Lebanese singularity is perhaps especially reflected in the assessment of the relations between civilian and military power, with quite a distinct opinion from the rest of the countries analysed.

**Lebanese respondents are much more optimistic than the rest of respondents while evaluating the relations between civil and military power.**

**Graph 14.6: Comparing the improvement or deterioration in the past three years on governance elements: Euromed region and Lebanon** (% of answers considering that the following elements have deteriorated or highly deteriorated)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

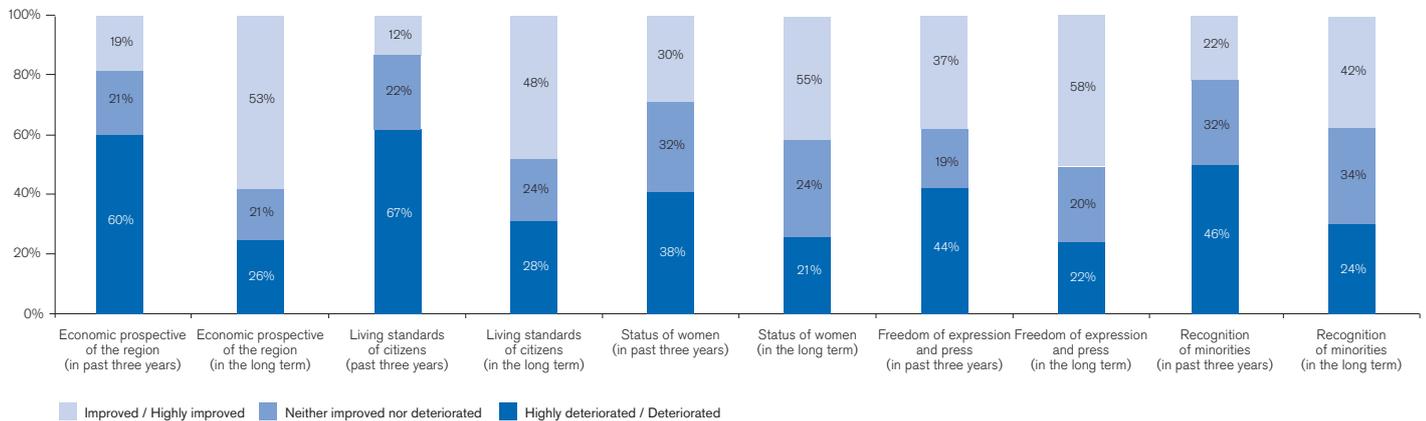
**Assessing socioeconomic changes in the last three years**

**Over the last three years, there has been a significant deterioration of socioeconomic issues, but the assessment in the long term is quite optimistic.**

The results related to economic and social changes are quite clear. On economic questions there has been a significant deterioration over the last three years but it is clearly established that it could improve in the medium and long term.

This is also the case in the rest of the fields analysed, where the recent past and the long-term prospects contrast. However, we must carefully observe the nuances of these results (see graph 15).

**Graph 15: Comparing the improvement or deterioration in the past three years and in the long term on socio-economic elements**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

Although their evolution is considered to have deteriorated, the three social elements are less negatively assessed in the last three years. In terms of the status of women and freedom of expression, more than a third of responses indicate that there has been improvement in the last

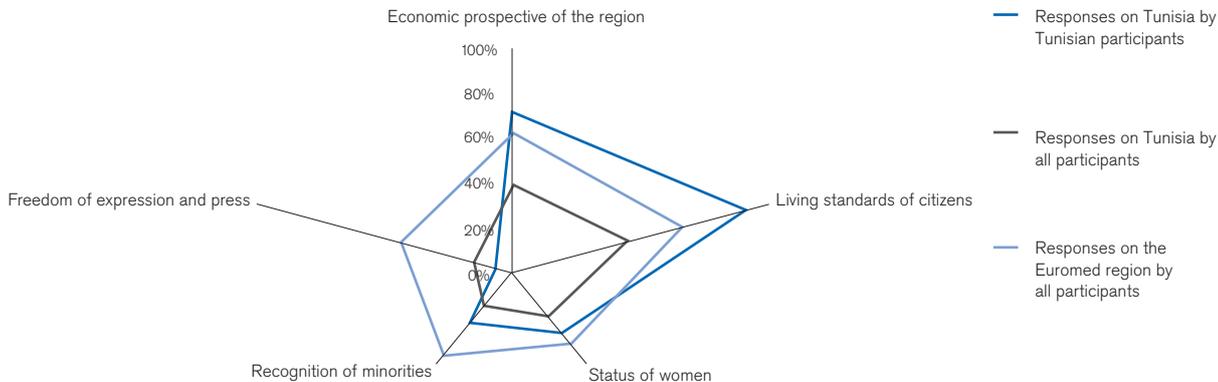
few years. Moreover, responses for the long term are among the most positive in the Survey; in both cases over 50% of respondents consider that it will improve over the next few years. Despite following the same trend, the result for the recognition of minorities is more nuanced. A higher percentage of responses consider its recent evolution to be negative, and there is less optimism about its improvement in the long term.

### Focusing on the changes in individual countries

The negative impact of economic development is a constant in most MPCs, while the issues more linked to rights and liberties have a heterogeneous assessment, partly reflecting the fact that the impact of the changes and uprisings varies according to country. Thus, following the previous classification of countries according to intensity of change (uprising, reform or no changes) we see a substantial change in the improvement of rights in Tunisia, with a notable self-perception of improved freedom of expression and press. In Egypt, however, it is considered that all fields have deteriorated, above the sample average (see Block 1, Annex IV).

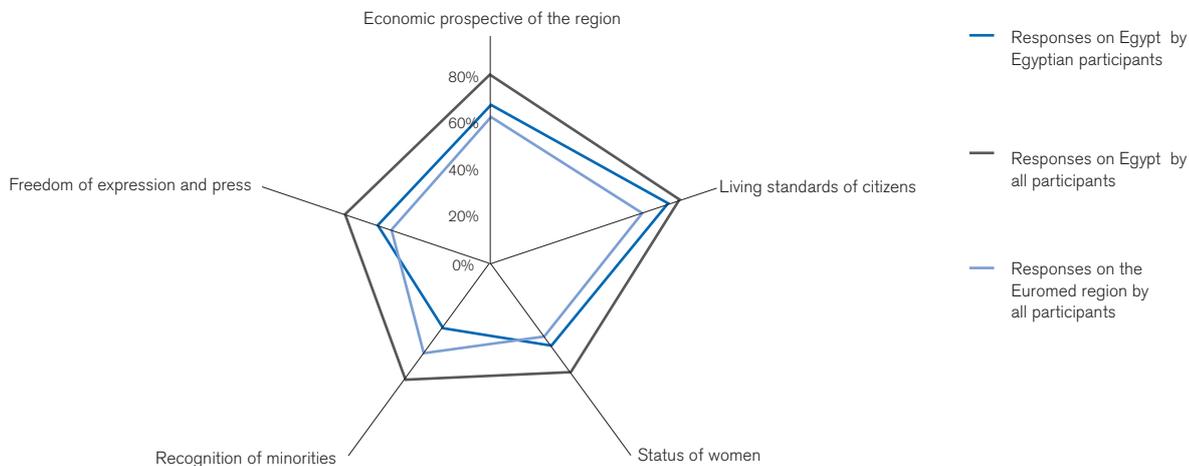
**Most respondents consider that in Tunisia civil rights and liberties have improved, while in Egypt they have significantly deteriorated.**

**Graph 15.1: Comparing the improvement or deterioration in the past three years on socioeconomic elements: Euromed region and Tunisia** (% of answers considering that the following elements have deteriorated or highly deteriorated)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**Graph 15.2: Comparing the improvement or deterioration in the past three years on socioeconomic elements: Euromed region and Egypt** (% of answers considering that the following elements have deteriorated or highly deteriorated)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**Among the countries that have undertaken reforms, Morocco is the only country with a positive evolution of rights and liberties.**

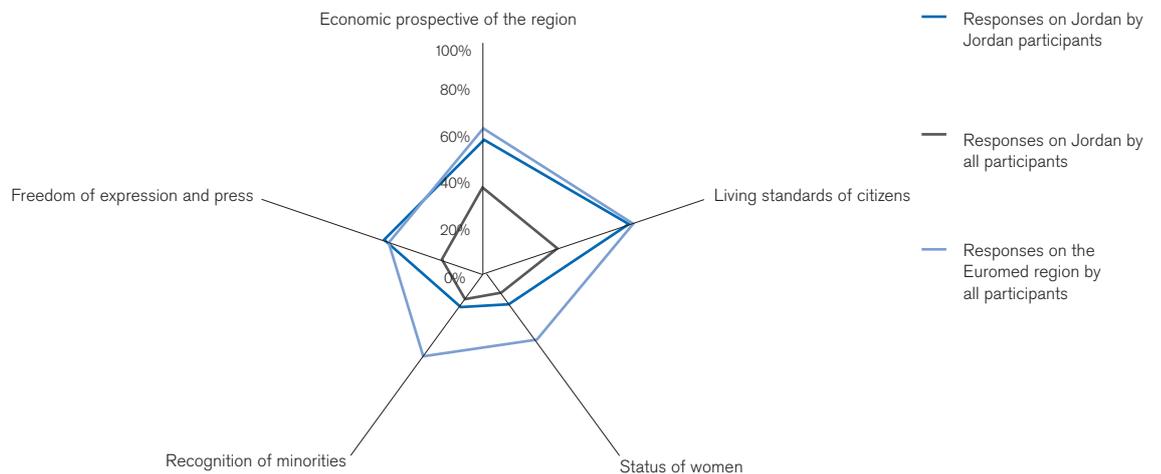
For the countries that have undertaken reforms over these three years, no clear comparison can be established. For example, the results of Morocco and Jordan reflect a disparate economic situation, considerably below the regional average in Morocco and in keeping with the regional trend in Jordan. In terms of rights and liberties, it is notable that the evolution in Morocco is even positive (the only case among the three countries analysed).

**Graph 15.3: Comparing the improvement or deterioration in the past three years on socioeconomic elements: Euromed region and Morocco** (% of answers considering that the following elements have deteriorated or highly deteriorated)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

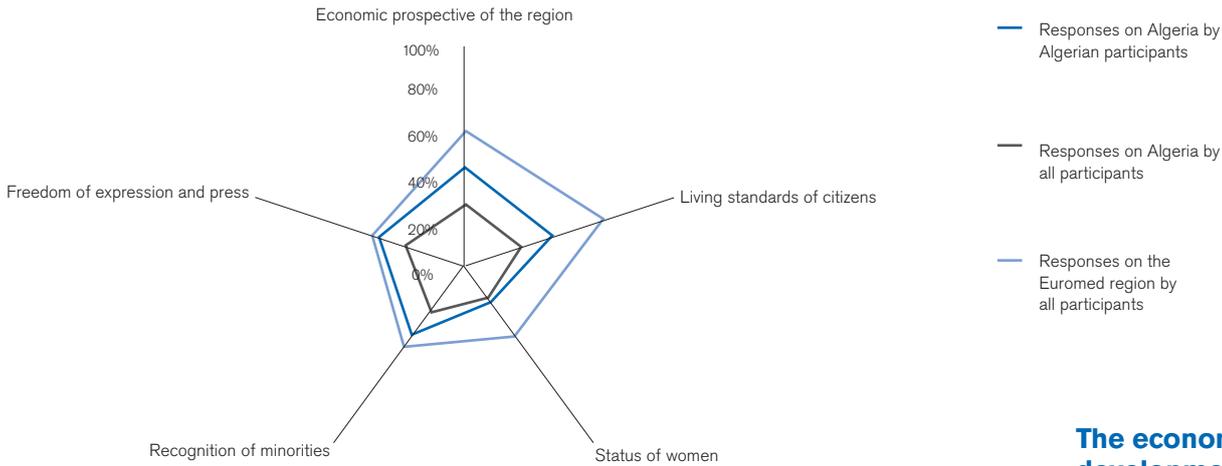
**Graph 15.4: Comparing the improvement or deterioration in the past three years on socioeconomic elements: Euromed region and Jordan** (% of answers considering that the following elements have deteriorated or highly deteriorated)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

Once again in the case of Algeria, the perception of Algerians themselves is considerably more negative than the assessment of the country, coinciding only in the case of the status of women.

**Graph 15.5: Comparing the improvement or deterioration in the past three years on socioeconomic elements: Euromed region and Algeria** (% of answers considering that the following elements have deteriorated or highly deteriorated)

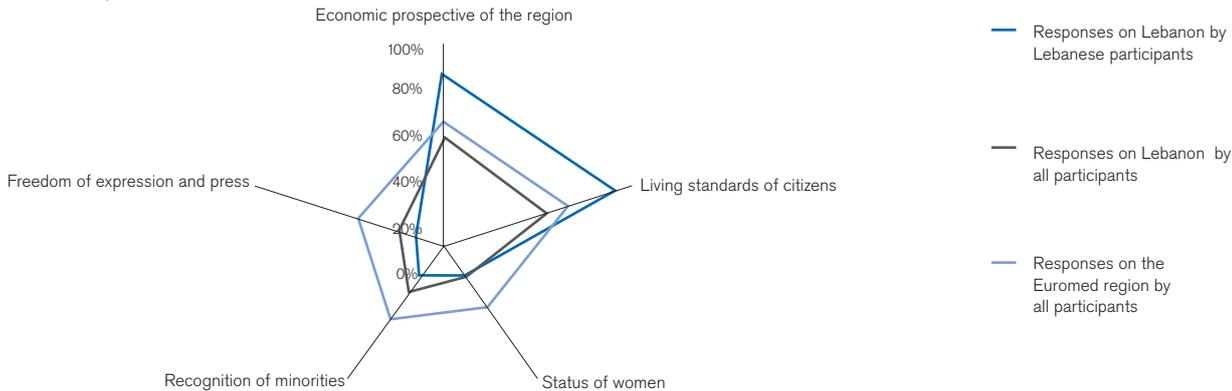


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

The case of Lebanon shows a diverse scenario. Here the economic situation has been negative and its perception within the country is especially pessimistic, while the evolution of rights and liberties has been more satisfactory.

**The economic developments in Lebanon are negative, while the evolution of rights and liberties is more satisfactory.**

**Graph 15.6: Comparing the improvement or deterioration in the past three years on socioeconomic elements: Euromed region and Lebanon** (% of answers considering that the following elements have deteriorated or highly deteriorated)



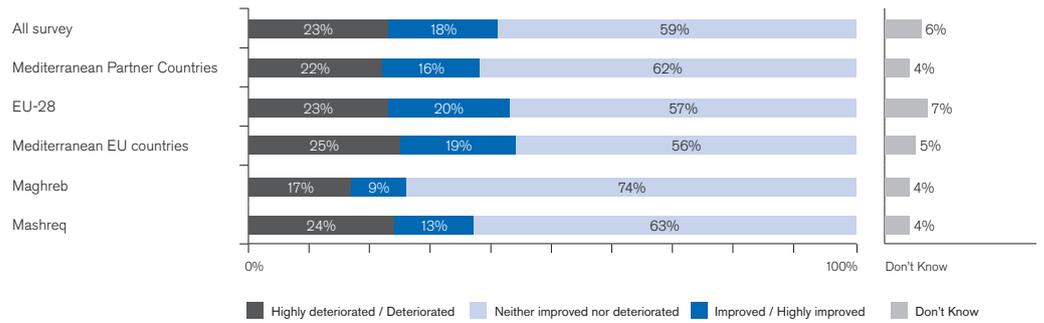
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**The overall development of the rule of law and governance and the independence of judiciary in the long term receive a positive assessment.**

**Governance in the long term will improve**

As previously indicated (see graph 14), it is highly relevant to note the positive assessment received in the long term by the rule of law and governance and independence of the judiciary. But if there is an interesting observation, it is that the opinion from the MPCs and the EU Mediterranean countries (see graph 16) is more optimistic about the future scenario. Responses are significantly more positive in the Maghreb.

**Graph 16: Assessing the improvement or deterioration in the long term of the rule of law and good governance; respondents from:**

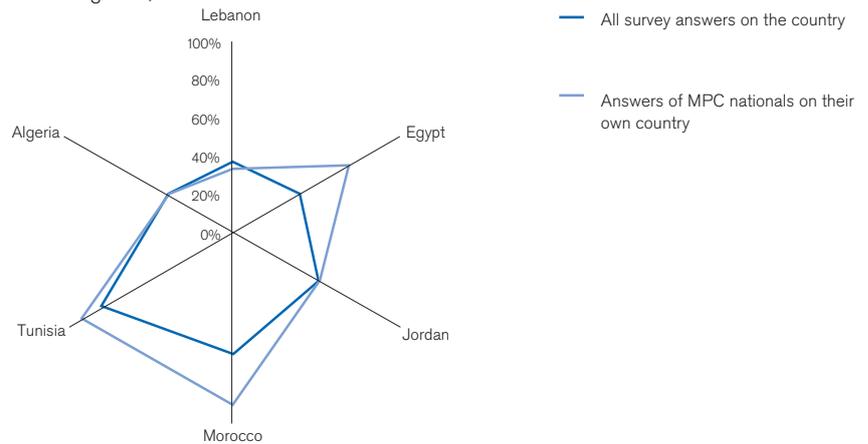


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**When analysing the results by country, the optimism about the developments of the governance issues in Algeria, Jordan and Lebanon is less solid.**

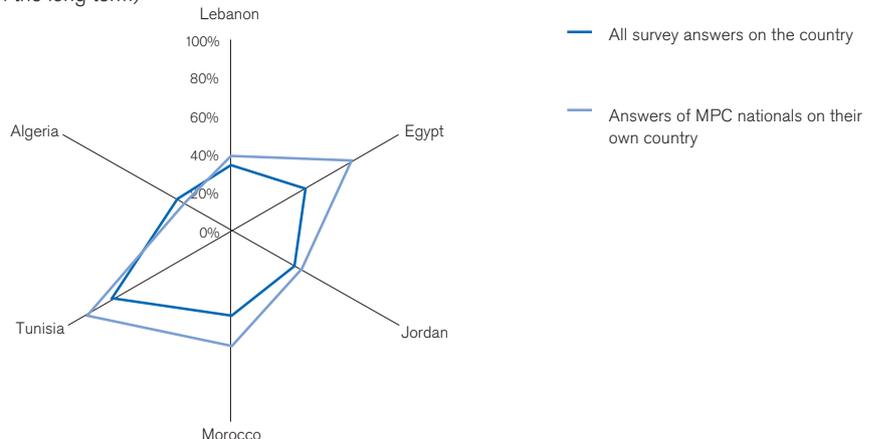
However, the results by country allow us to see a less solid optimism for countries such as Algeria, Jordan or Lebanon. Moreover, it is notable to see how the results of Tunisia, Morocco and Egypt significantly indicate improvement of these key points for governance, and the fact that opinions differ considerably if we compare general responses from all respondents with nationals of each of the countries about their own country. This result can be indicative of the confidence that exists among the population about the improvement of the current situation in the countries involved.

**Graph 16.1: Rule of law and good governance** (% of answers considering that the following elements will improve or highly improve in the long term)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**Graph 16.2: Independence of the judiciary** (% of answers considering that the following elements will improve or highly improve in the long term)



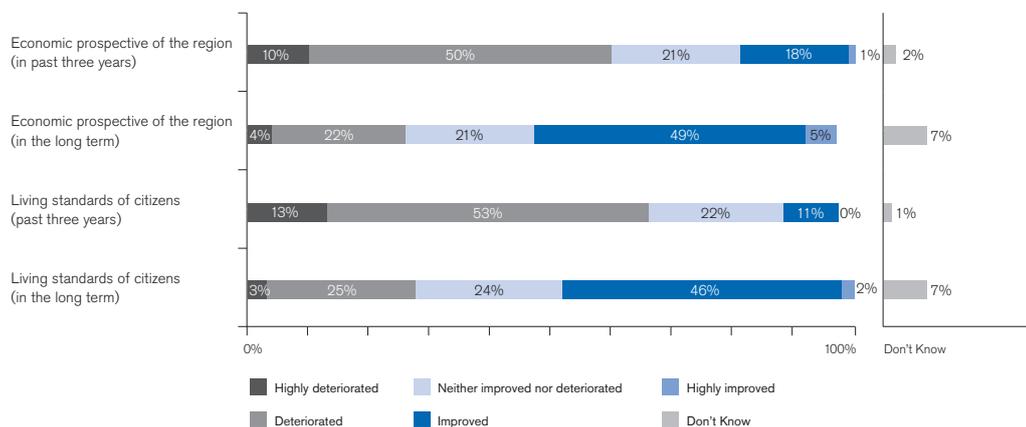
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Economic prospects are positive

Graph 15 shows us that this same positive dynamic also occurs for economic factors (economic prospective of the region, and living standards of citizens); that is, the past and future perceptions of the evolution of the economy are completely opposed. Although in the previous three years it has been very negative, respondents consider that this will improve in the long term. The same happens with living standards and, once again, there is a differential in positive responses for Maghreb and Mashreq countries (see Annex IV; Set of Results).

**According to the respondents, the economic prospects of the region and the living standards of citizens will definitely improve in the long term.**

**Graph 17: Comparing the improvement or deterioration in the past three years and in the long term on economic elements**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

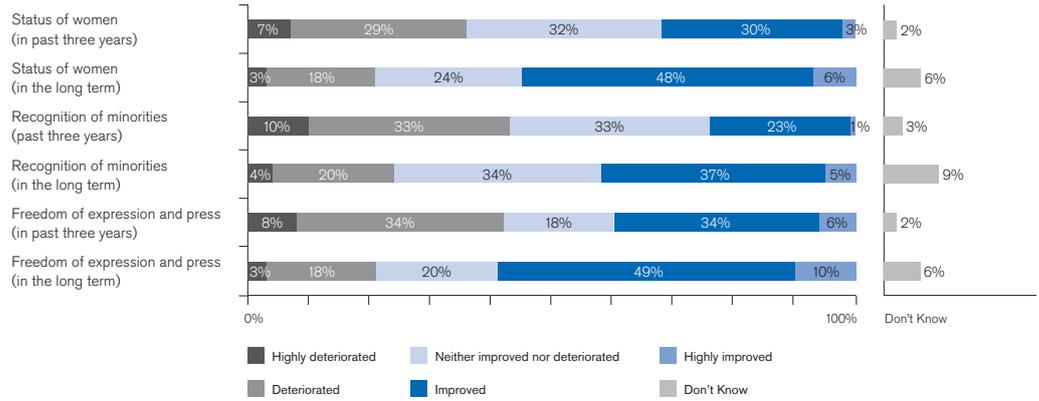
### Optimism about the prospects for rights and liberties

As previously seen, responses for the long-term evolution of rights and liberties follow the same trend as those related to governance and economics; that is, a negative assessment of the recent past and a positive prospect in the long term. Freedom of expression and press is notable, as almost 60% of responses consider that it will improve (see graph 18) and it is important to note that its evolution over the last three years was already fairly well assessed, although not for the majority (37% consider that it has improved while 44% think it has deteriorated).

Secondly, it is important to mention the view about the status of women in the long term in the region, as this is one of the elements that also received a broadly positive assessment, and followed on from quite a positive assessment of the past three years, given that 30% of respondents felt it had improved while 38% indicated the opposite (see graph 18). Following the trend of the other fields analysed, this view is held by 70% in Maghreb countries and 61% in the Mashreq (see Annex IV; Set of Results).

**The development of freedom of expression and press, and the status of women in the long term has received a broadly positive assessment.**

**Graph 18: Comparing the improvement or deterioration in the past three years and in the long term, on social elements**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**Occupied Palestinian Territories**

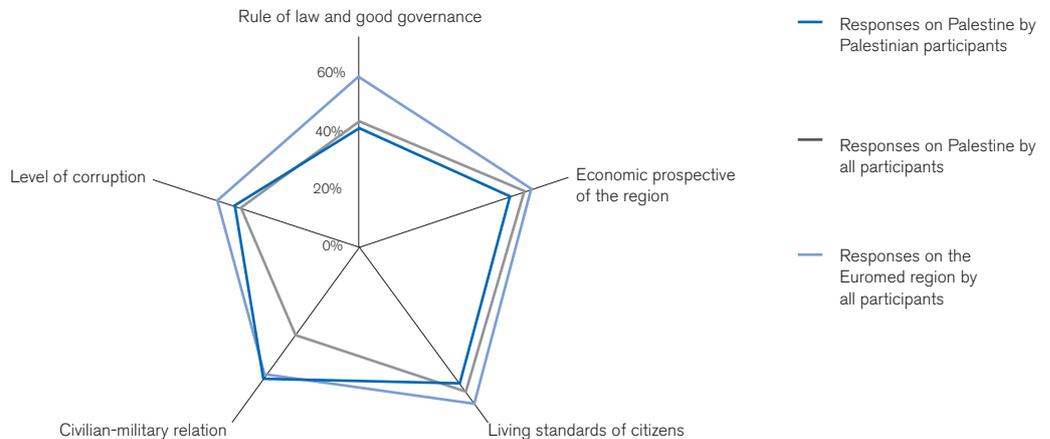
**Forward-looking assessment of Palestinians of the rule of law and governance and civilian-military relations in Palestine is much more positive than the opinion of the rest of respondents.**

The specificity of the Palestinian case makes this singularised analysis interesting. In general terms, the responses about Palestine and the responses received from Palestine follow similar patterns to the other countries in the region. In other words, a critical assessment of the last three years and moderate optimism in the long term.

Looking at the assessment made from within the country, it is notable that rule of law and governance have more nuanced results: their deterioration is not so acute (see graph 20.1) and it will not improve as much as in the average of countries. Here the forward-looking assessment by Palestinians themselves is considerably more positive than the opinion of all respondents about Palestine (see graph 20.2).

There is also an observable disparity between the general opinion about the relations between civilian and military power in Palestine and the opinion of the Palestinians themselves, a difference of almost 20% in the negative assessment of these relations in the last few years.

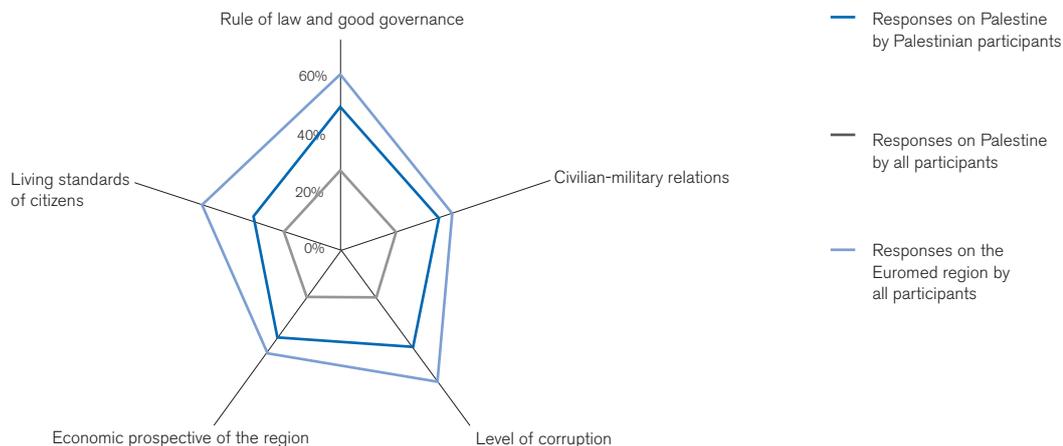
**Graph 20.1: Occupied Palestinian Territories** (% of answers considering that the following elements have deteriorated or highly deteriorated in the last three years)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

In the long term there are similarities with the trend seen for Morocco, Tunisia or Egypt, where the responses from the countries themselves are more optimistic than the overall responses about the country. However, it is notable that the possible improvement in elements analysed is considerably below the regional average.

**Graph 20.2: Occupied Palestinian Territories** (% of answers considering that the following elements will improve or highly improve in the long term)



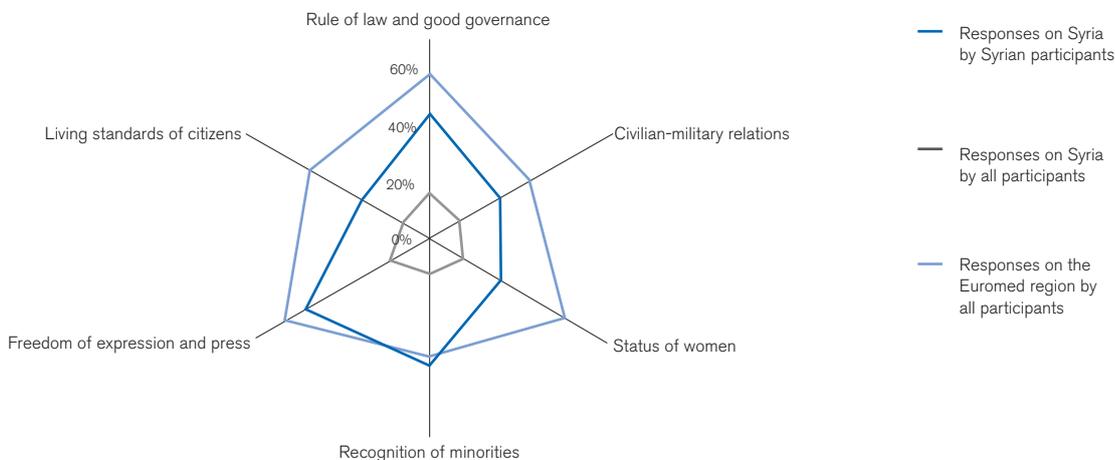
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Prospects for Syria and Libya

This first block of questions also gives us an idea of how the long term is seen for two countries that have experienced critical changes. The overall trend of the forward-looking responses is negative, in contrast to the other countries in the region, where a negative analysis of the recent past can be differentiated with a clear trend towards optimism.

The war in Syria is notably affecting the future political and economic development of the country, especially if compared with the regional average. However, we must note, as can be seen in graph 19, that the responses from people in Syria offer a considerably more optimistic view.

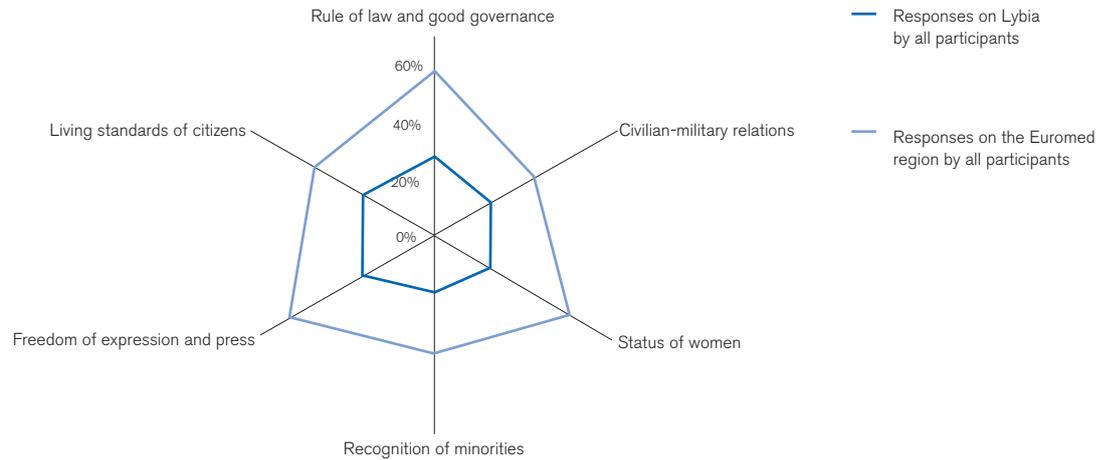
**Graph 19: Syria** (% of answers considering that the following elements will improve or highly improve in the long term)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

In the case of Libya, the first data to take into account is that 20% of respondents do not express a concrete opinion about the prospects of the country. Of those who do assess these fields, we see that, as in the case of Syria, in the long term they do not expect an improvement of the main political and economic elements analysed, situating the long-term prospects for improvement for Libya far below the regional average.

**Graph 19.2: Libya** (% of answers considering that the following elements will improve or highly improve in the long term)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

## GEOPOLITICAL CHANGES IN THE REGION

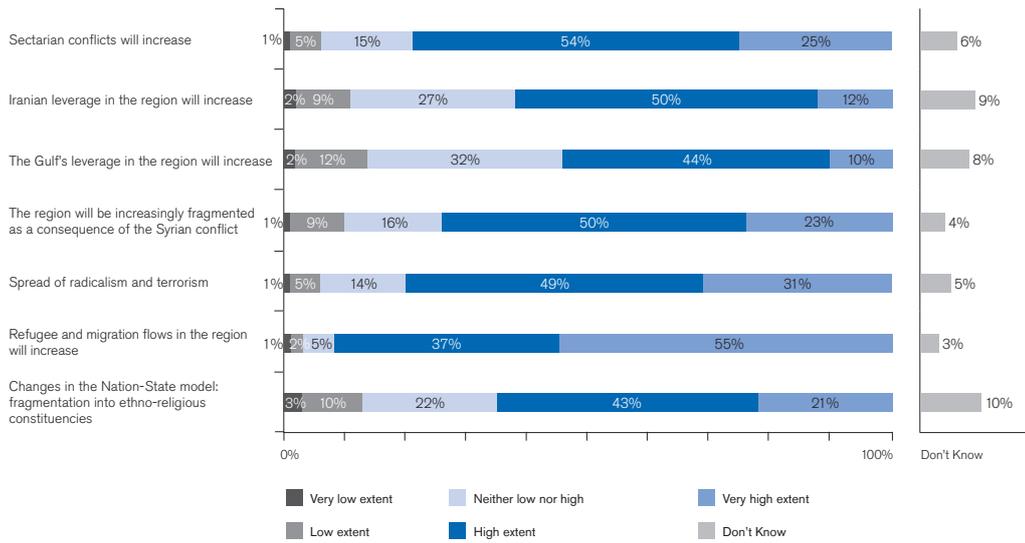
### Main findings

- The main effect of the war in Syria on the region is, according to respondents, the impact on the refugee crisis and migration flows.
- There is a notable concern about the spread of radicalism and terrorism, and the increase in sectarian conflicts.
- The classification of international actors in the region is clear, but with nuances, especially if we observe the responses according to groups of countries. While there is no doubt about the preponderance of the role of the USA, it is interesting to see how the role that can be played by Russia and Iran varies significantly according to the responses from the Maghreb or Mashreq.
- Prospects for democracy are only significant in Tunisia.
- There is a correlation between the opinion about the positive evolution of the rule of law and good governance and independence of the judiciary, and the probability of the consolidation of democracy.

### Syrian conflict

The Survey fieldwork coincided with the start of the third year of the war and it asked about the effect of the war on different regional scenarios. Arranging the responses according to the option that indicated to a very high extent, it is possible to see the great concern about the refugee crisis and the impact on migration flows in the region. Secondly, the scenario of the spread of radicalism and terrorism produces a more nuanced result, as does the increase of sectarian conflicts. Another remarkable aspect of graph 26 is that the increase in the influence of both Iran and the countries of the Persian Gulf, despite having a significant weight, is not of the same magnitude as the other scenarios.

**Graph 26: Assessing the following scenarios affected by the Syrian conflict**

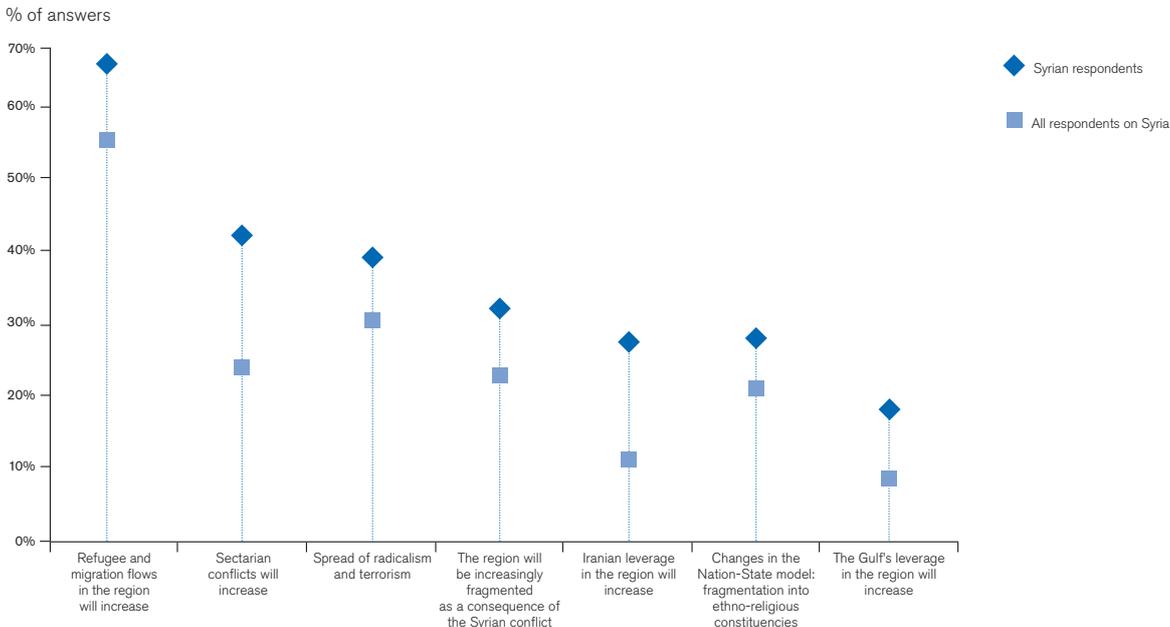


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

It is interesting to see the breakdown according to responses by participants from Syria. In this respect, it is notable that the general trend is broadly repeated but there are specific differentiating elements. First, Syrian participants tend to attach more importance to the effect of war on the scenarios put forward. Graph 27 shows how the option (very high extent) obtains between 10% and 15% more responses. The maximum difference is seen between the sample average and the responses from Syrians to the scenarios related to Iranian leverage and the increase of sectarian conflicts.

**According to the respondents, the Syrian war will have a major effect on the increase in refugee and migration flows and the spread of radicalism and terrorism.**

**Graph 27: Assessing the following scenarios affected by the Syrian conflict (% of answers considering that it will affect to a very high extent)**



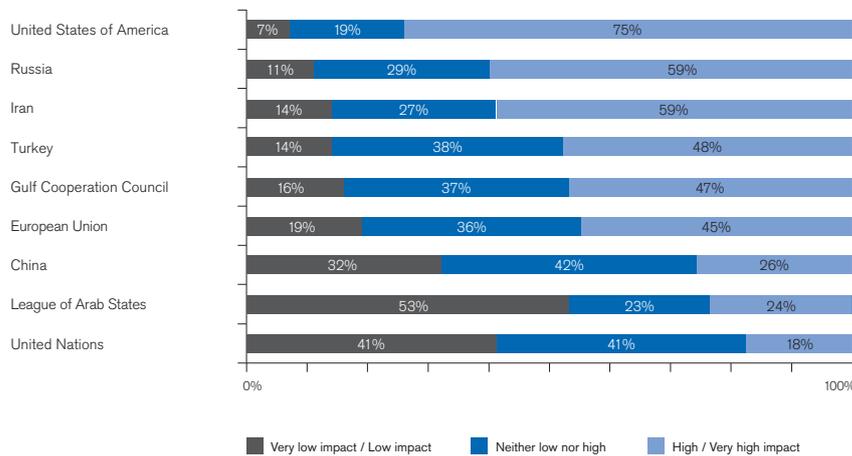
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Impact of international players in the region

**According to the Survey results, the most important external actors in the region are USA, Russia and Iran.**

According to the Survey results, the major international actors in the region can be classified into three big groups. First, those exceeding 50% of responses indicating that their role is important or very important: USA, followed by Russia and Iran; secondly, where this percentage is nearly 50% in Turkey, the GCC and the EU; and, finally, China, the League of Arab States and the United Nations are equal to or lower than 25%.

**Graph 21: Assessing the impact of the following international players in the Southern Mediterranean countries**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

The international and regional organisations (UN and LAS) are losing their role while the individual states are increasing their direct intervention (Iran, Russia and China supporting the regime and GCC and Maghreb). The EU and USA are hesitant and losing a lot of their credibility (especially the EU). Some EU member states are intending to play a role but they are not efficient.

Lebanese respondent

The dialogue between the West and Iran and the flexibility shown by the new Iranian President will increase Iranian prestige and therefore its geopolitical influence. Russia has been the winner in the Syrian case, since it stuck to its position very stubbornly and has shown potential allies that they can rely on its unshakable support. It has not been the case of the USA or the EU, too hesitant and reluctant to tip the balance in favour of the opposition to Bashar.

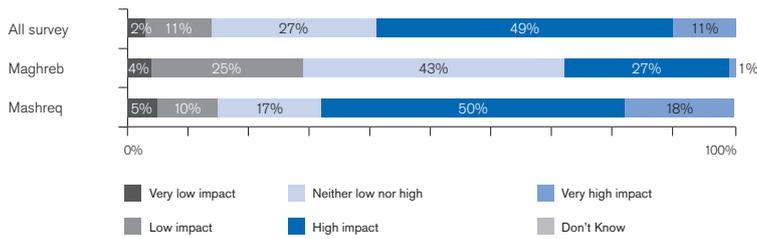
Belgian respondent

**The role of Russia and Iran is seen as much more significant in the Mashreq than in the Maghreb.**

This is quite a clear classification although we must not overlook the nuances, especially if we observe the responses according to groups of countries (see detail in Annex IV). While the preponderance of the role of the USA offers no doubts, it is interesting to see how the role that Russia and Iran can have varies significantly according to responses from the Maghreb or Mashreq.

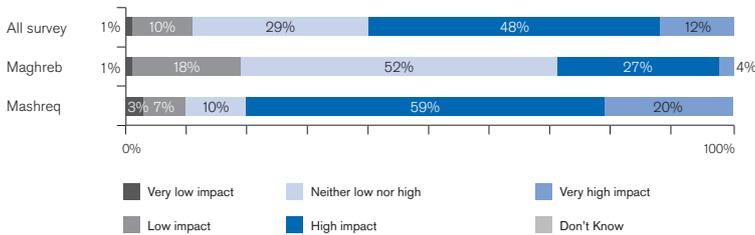
While the rest of the groups of countries have results very much in line with the Survey average, the results for the Maghreb and Mashreq show notable variations, as can be seen in graphs 22 and 23, which show that both actors are seen as more relevant in the Mashreq.

**Graph 22: Assessing the impact of Iran in the Southern Mediterranean countries**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**Graph 23: Assessing the impact of Russia in the Southern Mediterranean countries**



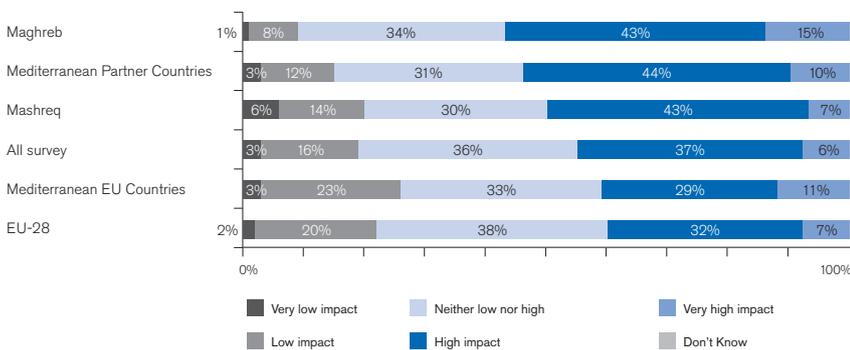
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

If we focus on the second block of actors, Turkey, the GCC and the EU, we see the same trend where the countries of the Maghreb generally assess the role of Turkey and the GCC as less relevant. In this case, the assessment of the Mashreq is around the sample average.

The results on the role of the EU in the region are more interesting. The south, especially Maghreb and Mashreq countries, assess the impact that the EU can have on the region quite positively (graph 24), especially if compared with the responses from EU countries.

**The impact of the EU in the region receive more positive evaluation from Maghreb and Mashreq countries than from the EU member states.**

**Graph 24: Assessing the impact of the European Union in the Southern Mediterranean countries**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

In this respect, the detail about the relevance attached to the regional role of the EU from the main EU countries differs according to countries analysed. In terms of responses that consider the relevance of the EU high or very high, only responses from Spain are above the Survey average. Germany is slightly above the EU average, while only one third of responses from Italy and France consider it to be relevant.

**Respondents from Spain and Germany assess the role of the EU in the region as much more relevant than the average of the respondents from the EU countries.**

We need to differentiate: the impact of Russia is very high in Syria and high in Iraq while the US impact continues to be very high in the whole region. The EU's impact is very low in the Middle East conflicts, but high enough in Tunisia and Morocco.

Tunisian respondent

The European Union is one of the major trading partners of its southern neighbours. Furthermore, the EU has strong soft power in the region. In this context, it cannot be denied that the other actors are making significant attempts to increase their influence in the region.

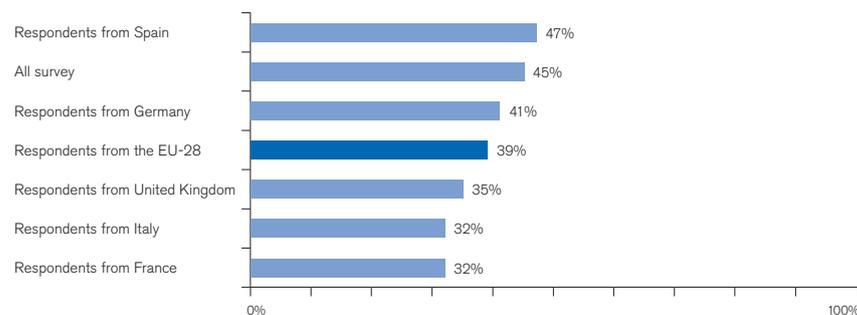
Maltese respondent

In the current Mediterranean scenario traditionally powerful actors (e.g. US or Russia) still maintain a key role. Moreover, regional influential powers (Iran but also the Gulf countries) do play a fundamental role. Last but not least, China is increasingly becoming a key regional actor. The EU as such is struggling to count more than the UN, but EU domestic views do weaken its regional impact.

Italian respondent

**Graph 25: Assessing the impact of the European Union in the Southern Mediterranean countries**

(% of answers stating Very high influence / High influence)



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Prospects for consolidation of democracy

**Tunisia and Morocco are considered to have the best prospects for democratic consolidation.**

At the forward-looking level, the results related to democratic consolidation are distributed as in graph 28, so the country with the highest probability of having a period of consolidation of democracy is Tunisia. The responses, depending on whether they are from the Southern or Northern Mediterranean, vary but not significantly.

The next country in this classification is Morocco at a considerable distance, so that almost 20% of responses believe it has good prospects for consolidating democracy. At a considerable distance we find Jordan and Lebanon. A third block comprising Algeria, Egypt and Palestine has very low percentages, while Syria and Libya obtain minimum results.

Consolidation of a democratic regime takes time and it requires several generations of education, economic welfare and digestion of democratic principles and implementation. At this juncture and in the communication age it could be a little shorter but in that case democratic states should be more cooperative and ready to work with them instead of imposing certain values on them. Imposition does not work. Raising awareness and investing in youth and women will help bridge the gap sooner.

Turkish respondent

The prospects for political participation in the post-revolutionary Arab world face several challenges on both structural and infrastructural levels. This is not surprising considering the decades of authoritarianism that the region is recovering from. But the progress that has already been made and that is likely to come, no matter how small, is an important indicator that although it may not fully materialize in the short term, a new era of political participation in the Arab world is in the making.

Syrian respondent

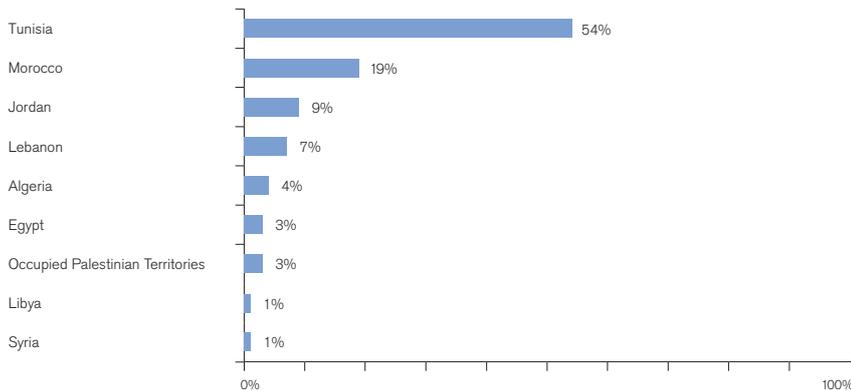
We are not talking about the Western type of democracy but the one adapted to local conditions and social fabric.

Hungarian respondent

Here it is interesting to see the correlation between the responses about the long-term evolution of elements such as rule of law and good governance or the independence of the judiciary, which can be seen in graphs 16.1 and 16.2 as the opinion about the positive evolution of one of these elements coincides with the probability of consolidating democracy.

**Countries with the lowest probability to consolidate democratic regimes are Syria and Libya.**

**Graph 28: Order of countries according to their likelihood of having better prospects for the consolidation of a democratic regime**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

The most outstanding element is found by comparing it with the previous Surveys. The Report of the 4th Survey<sup>2</sup> established a classification enabling countries to be grouped into three blocks: the first, comprising Tunisia, Lebanon and Morocco, obtained similar averages in the assessment of their prospects of deep and sustainable democracy. According to the results of this year's Survey, Jordan would replace Lebanon, while Algeria would improve its results to the detriment of Egypt, which has seen fewer probabilities of consolidating democracy.

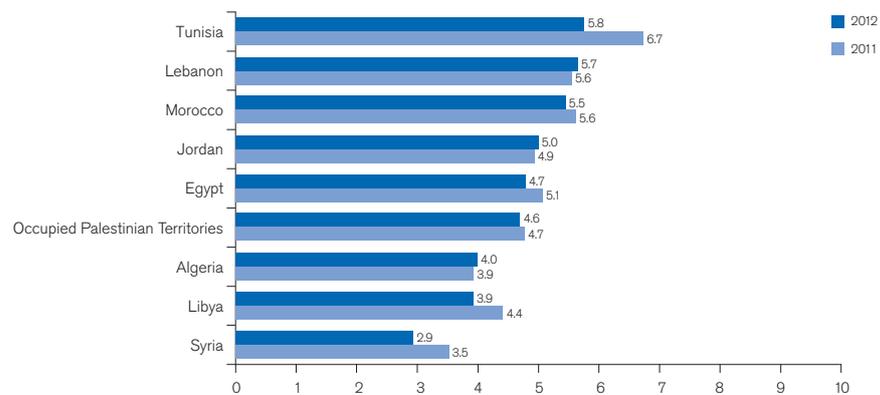
It is notable that every country has its own perception of what a democratic regime should be. Political awareness and maturity in all these countries varies and is highly related to the social, education and economic strata that the respective citizen belongs to.

Jordan respondent

La région est en état de perturbation, ceci rend les réponses aléatoires et non précises.

Lebanese respondent

**Graph 29: Assessing the prospects of deep and sustainable democracy in the following countries comparing 2011 and 2012 results (average on a scale of 0-10)**



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

2. See 4th Euromed Survey report (2013), pp 78-79.