

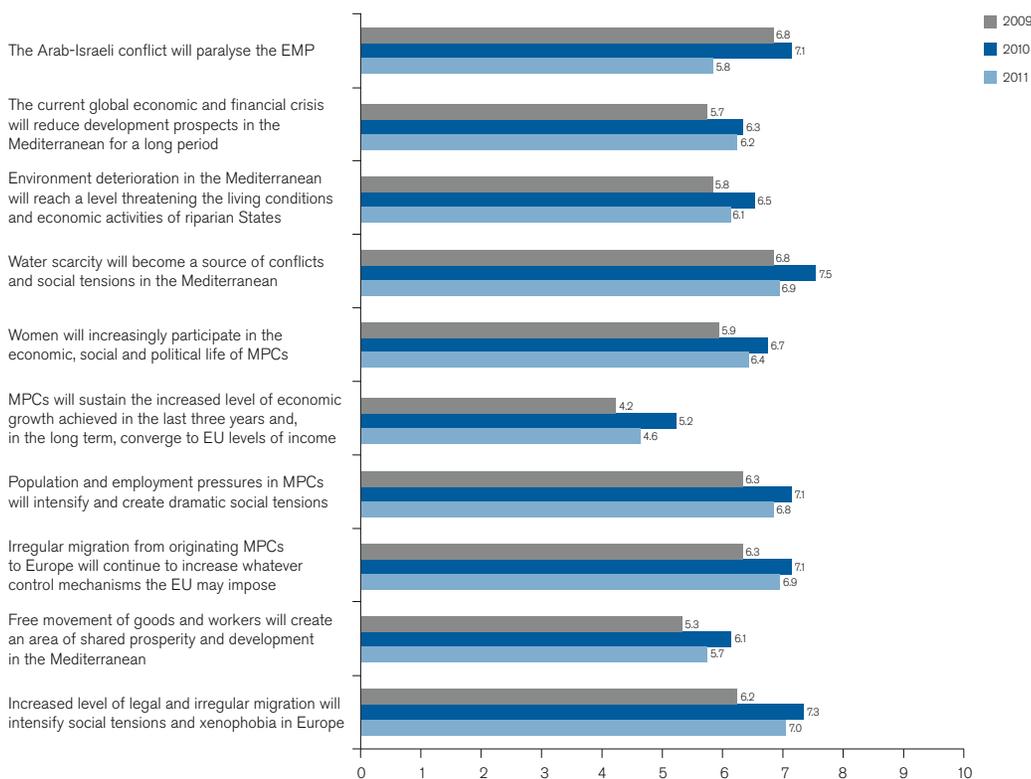
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# PROSPECTIVE AND POLICY RECOMMENDATIONS

## Potential Hypotheses in the Medium and Long Term in the Mediterranean (in a Status Quo Scenario)

In question 26 respondents were asked to rank a number of hypothetical scenarios occurring in the Mediterranean in the medium to long term using a scale of 0 to 10, with 10 being a highly probable scenario provided that there are no changes in the status quo. The rise of legal and irregular migration from MPCs to Europe was identified by respondents as the most probable factor intensifying social tensions and xenophobia in Europe, with an average of almost 7. Migration issues were immediately followed by water scarcity and population and employment pressures as main sources of conflicts and social unrest in the Mediterranean, with an average grade of 6.8 and 6.8, respectively. Surprisingly, the Arab-Israeli conflict, which ranked second as most probable scenario in the medium to long term in the Mediterranean in the 2009 Survey (see graph 2), comes only in ninth position in the present Survey. Such a remarkable regression is probably explained by the Arab uprisings last spring, which have shifted the order of priorities in the Mediterranean basin, while downplaying the significance of the conflict.

**Graph 1: Degree of probability attributed to the following potential mid- to long-term hypotheses in the Mediterranean (average on a scale of 0-10)**



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

**Graph 2: Degree of probability attributed to the following mid- to long-term hypotheses in the Mediterranean**  
(average on a scale of 0-10)

	2011	2010	2009
Increased level of legal and <b>irregular migration</b> will intensify social tensions and <b>xenophobia</b> in Europe	1 <sup>st</sup>	2 <sup>nd</sup>	6 <sup>th</sup>
<b>Irregular migration</b> from originating MPCs to Europe will continue to increase whatever control mechanisms the EU may impose	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
Water scarcity will become a source of conflicts and social tensions in the Mediterranean	3 <sup>rd</sup>	1 <sup>st</sup>	1 <sup>st</sup>
<b>Population and employment pressures</b> in MPCs will intensify and create dramatic social tensions	4 <sup>th</sup>	5 <sup>th</sup>	3 <sup>rd</sup>
Women will <b>increasingly participate</b> in the economic, social and political life of MPCs	5 <sup>th</sup>	7 <sup>th</sup>	7 <sup>th</sup>
The current global economic and financial <b>crisis</b> will reduce development prospects in the Mediterranean for a long period	6 <sup>th</sup>	9 <sup>th</sup>	9 <sup>th</sup>
<b>Environment deterioration</b> in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States	7 <sup>th</sup>	8 <sup>th</sup>	8 <sup>th</sup>
<b>Regime change</b> will become the rule in the Mediterranean	8 <sup>th</sup>	n.a.	n.a.
The Arab-Israeli <b>conflict</b> will paralyse the EMP	9 <sup>th</sup>	4 <sup>th</sup>	2 <sup>nd</sup>
<b>Free movement of goods and workers</b> will create an area of shared <b>prosperity</b> and development in the Mediterranean	10 <sup>th</sup>	10 <sup>th</sup>	10 <sup>th</sup>
<b>MPCs</b> will sustain the increased level of economic growth achieved in the last three years and, in the long term, <b>converge to EU levels</b> of income	11 <sup>th</sup>	12 <sup>th</sup>	13 <sup>th</sup>
Political regimes in MPCs will show a high degree of <b>continuity</b>	n.a.	6 <sup>th</sup>	5 <sup>th</sup>
Gulf Cooperation Council members will facilitate a higher degree of <b>South-South</b> economic <b>cooperation</b> in the Mediterranean	n.a.	11 <sup>th</sup>	11 <sup>th</sup>
The increased level of migration, economic and human exchanges will give way to the emergence of a <b>common Mediterranean identity</b>	n.a.	13 <sup>th</sup>	12 <sup>th</sup>

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

The second set of most probable hypotheses are that “*women will increasingly participate in the economic, social and political life of MPCs*” (6.4), followed by two gloomier hypotheses that “*the current global economic and financial crisis will reduce development prospects in the Mediterranean for a long period*” (6.2) and that “*environment deterioration in the Mediterranean will reach a level threatening the living conditions and economic activities of riparian States*” (6.1). All in all, the hypotheses of a more optimistic outlook, save for the increasing participation of women in socioeconomic and political life, correspond to the least probable scenarios, namely that “*the free movement of goods and workers will create an area of shared prosperity*” and that “*MPCs will converge in the long term to EU levels of income*”, each of which was given an average probability of 5.7 and 4.6, respectively.

By geographical region, it is important to note that respondents from the Mashreq consider it comparatively more probable that “*population and employment pressures in the MPCs will increase and create social tensions*”, that “*regime change will become the rule in the Mediterranean*” and that “*water scarcity will become a source of conflicts and social tensions*” (on average, 7.3, 6.6 and 7.3, respectively) than their Maghreb counterparts (6.45, 6.1 and 6.7, respectively). Israeli respondents also show strong support for the former scenario (7.6), while, together with Turkish respondents, they seem on average a little more sceptical about regime change becoming the rule in the Mediterranean (5.8 and 5.7, respectively).

Again, on the issue of migration and free movement of goods and workers the perceptions of the Mashreq and Maghreb respondents seem to differ notably. Maghreb respondents give an average prediction grade of 6.9 to the suggested scenario of *“irregular migration from MPCs to Europe continuing to increase whatever control mechanisms the EU may impose”*, whereas their Mashreq counterparts give it a lower average prediction grade of 6.6. Israeli respondents also point at this scenario as a highly probable one (7.8). Maghreb respondents also consider it comparatively more probable that *“the free movement of goods and workers will create an area of shared prosperity and development in the Mediterranean”* than respondents from the Mashreq region and from Israel (6.9, 6.6 and 5, respectively). In contrast, the hypothesis that an *“increased level of legal and irregular migration will intensify social tensions and xenophobia in Europe”* seems more plausible to Mashreq and Israeli respondents (7.2 and 7.7, respectively) than to their Maghreb counterparts (6.7). All in all, it can be argued that Maghreb respondents overall have a more optimistic opinion about the mid- to long-term scenarios in the Mediterranean area.

Finally, the open-ended questions, where respondents were given the opportunity to add their comments or further develop their views, partly confirm the outcome of the quantitative analysis, the rise of migration and the impact of the economic crisis being the two main factors leading to social tensions in the Mediterranean in the years to come.

La crise, plus que l'immigration - qu'elle soit légale ou non - est le facteur majeur d'intensification des tensions sociales et de la xénophobie, autant en Europe que dans les PPM.

Moroccan respondent

For migration and xenophobia I think that education (by introducing the concepts of rights of migrants and benefits they bring to the receiving societies) and raising the level of public awareness on both sides should be the focus of attention in the coming period.

Egyptian respondent

It is very difficult to tell as the Mediterranean basin is in transition and a lot depends on the quality and the speed of the process. A more concerted effort between EU member states, Euromed states and globally for a fast track development of the region will make a difference and then I would rate the above hypothesis more positively; at the moment globally all states are more concerned with how to survive the financial crisis and the consequences for their domestic affairs.

Maltese respondent

La questions migratoire est d'une actualité brûlante et sera l'épine dorsale qui conditionnera aussi le futur des relations entre les pays riverains de la Méditerranée.

Tunisian respondent

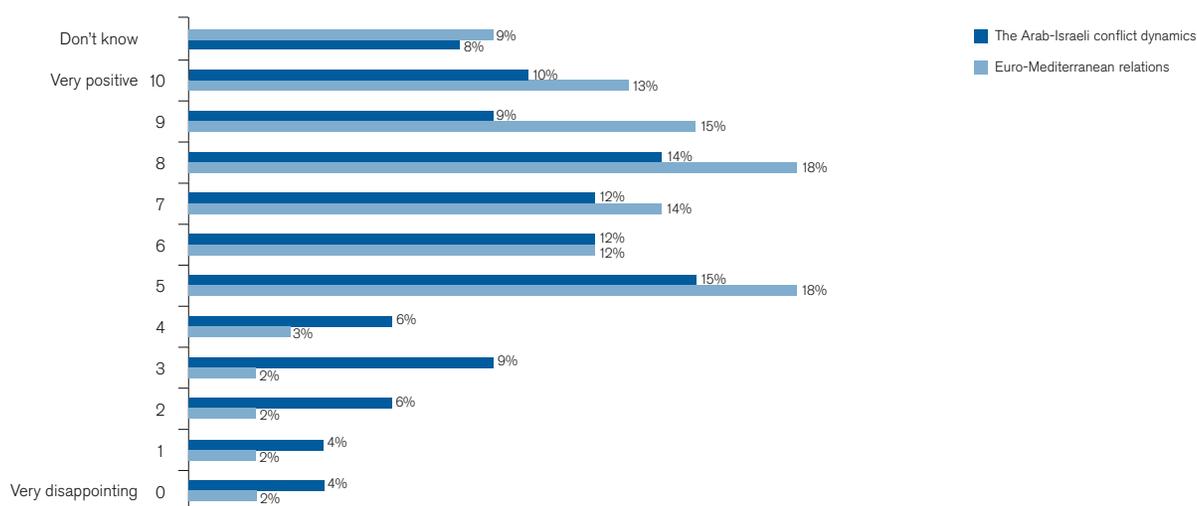
#### Most outstanding elements:

- The increasing relevance of migration issues versus the notable loss of significance of the Arab-Israeli conflict since the first Survey in 2009.
- Maghreb respondents give an overall more optimistic outlook for the prospects/scenarios in the Mediterranean than respondents from the Mashreq.
- Despite ranking only sixth in the most probable mid-/long-term scenarios, the economic crisis is very likely to shape the dynamics in the Mediterranean according to the open-ended responses.

### Implications of the Palestinian Application for UN Membership

When asked about the implications of the Palestinian application for UN membership, the majority of respondents believe that it will have a comparatively more positive impact on Euro-Mediterranean relations than on Arab-Israeli conflict dynamics. When looking specifically at the distribution of responses, it is worth noting that, on a scale of 0 to 10 – 10 being the most positive assessment –, almost 40% of responses regarding the implications for Euro-Mediterranean relations are concentrated at 8 (18%) and 5 (18%). The distribution of responses regarding the implications on the Arab-Israeli conflict matches the previous distribution, with 14% and 15% of the answers concentrated, respectively, at 8 and 5, namely that the Palestinian application for UN membership has had or will have either a very positive or a relatively positive impact on the Arab-Israeli conflict.

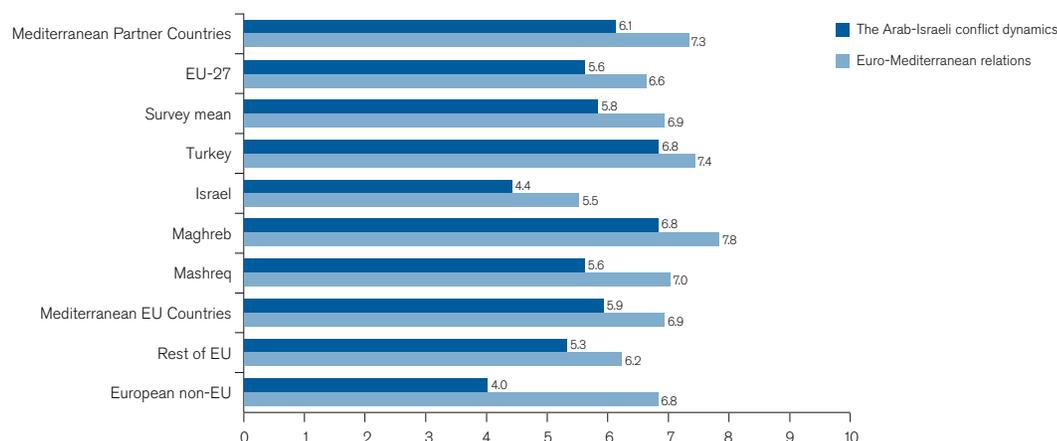
**Graph 3: Assessment of the implications of the Palestinian application for UN membership on: (%)**



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

By geographical distribution, respondents from Turkey and the Maghreb countries give a positive assessment of the impact of the Palestinian application for UN membership on Arab-Israeli conflict dynamics, with average grades of 6.8 and 6.7, respectively, well beyond the Survey mean (5.8). Respondents from the Mashreq and from the EU-27 also give a rather positive assessment of the Palestinian UN application on the dynamics of the conflict, though more moderate (5.6 for both). In contrast, respondents from Israel and in particular from European non-EU countries think that this will have a negative impact on the conflict dynamics (4.4 and 4, respectively).

**Graph 4: Assessment of the implications of the Palestinian application for UN membership on:**  
(average on a scale of 0-10)



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

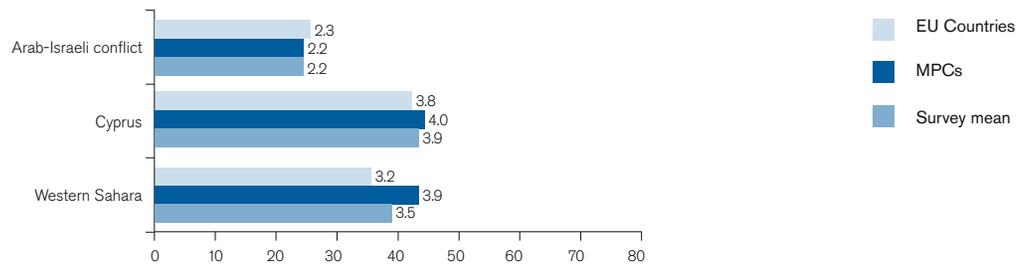
As for the implications for Euro-Mediterranean relations, Turkey and the Maghreb appear again as the most “optimistic” regions (with 7.4 and 7.8 as average grades, respectively), immediately followed by the broader category of MPCs (7.3) and respondents from the Mashreq, on the borderline of the Survey mean with an average grade of 6.95. Respondents from Israel remain moderate about the impact of the Palestinian UN membership application on Euro-Mediterranean relations, with an average grade of 5.5 — again below the Survey mean, yet slightly more optimistic than concerning its impact on the Arab-Israeli conflict (4.4). In contrast, the European non-EU countries, which were deeply pessimistic about its impact on the dynamics of the conflict (4), are fairly positive about its implications on Euro-Mediterranean relations (6.7).

#### Most outstanding elements:

- Turkey and Maghreb respondents are, on average, more optimistic about the impact of the Occupied Palestinian Territories' application for UN membership, both on the Arab-Israeli conflict dynamics and on Euro-Mediterranean relations than their counterparts in the Mashreq.
- Israeli respondents and respondents from European non-EU countries are quite pessimistic about the implications that this action will have on the conflict dynamics. In turn, the latter are positive about its implications on Euro-Mediterranean relations.

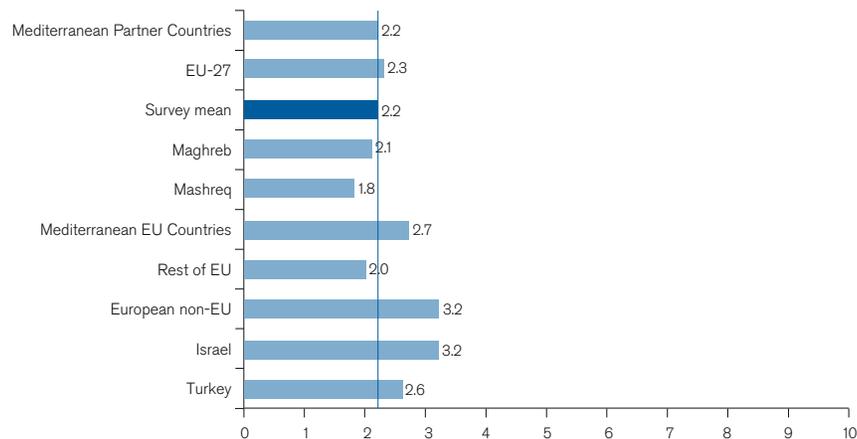
## The Role of the EU in Conflict Resolution in the Mediterranean and Potential Successes in the Near Future

On the probabilities of conflict resolution in the Mediterranean basin in the near future, respondents seem to be quite negative overall, all the more so with regard to the Arab-Israeli conflict. Figures speak for themselves. On a scale from 0 to 10 — 10 being the highest score in terms of probability —, respondents have graded with an average of 2.2 the chances that this conflict will be solved in the near future. By geographical distribution, EU countries appear as slightly less pessimistic on average (2.3) than their southern neighbours (2.2), but the figures altogether remain extremely negative.

**Graph 5: Assessing the probability that the following conflicts will be solved in the near future**

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

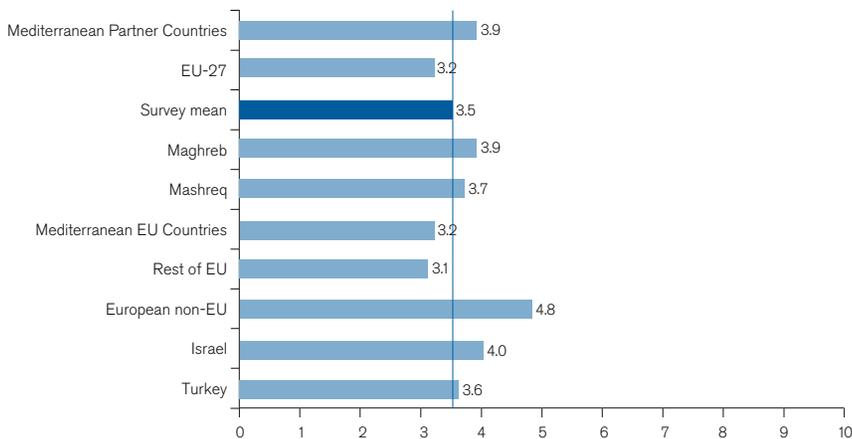
Looking more specifically at the regions, only respondents from Israel (3.2), from European non-EU countries (3.2), from Mediterranean EU countries (2.7) and from Turkey (2.5) seem less pessimistic about the prospects for an early resolution of the Arab-Israeli long-lasting conflict but figures remain very negative.

**Graph 6: Assessing the probability that the Arab-Israeli conflict will be solved in the near future**  
(average on a scale of 0-10)

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

The conflict in Western Sahara seems to raise somewhat higher expectations of resolution in the near future, at least compared to the previous one, even though the overall assessment remains fairly pessimistic (3.5 on average). In contrast with the previous conflict, this time MPCs are more “optimistic” than their northern counterparts (an average of 3.9 and 3.2, respectively). Compared to the distribution of answers of the previous conflict, here the average grades per region are more homogeneous and fluctuate more closely around the mean (3.5). In this respect, the average assessment given by respondents from European non-EU countries (4.8), which can be seen as a rather “hopeful” outlook, appears as an outlier to the distribution.

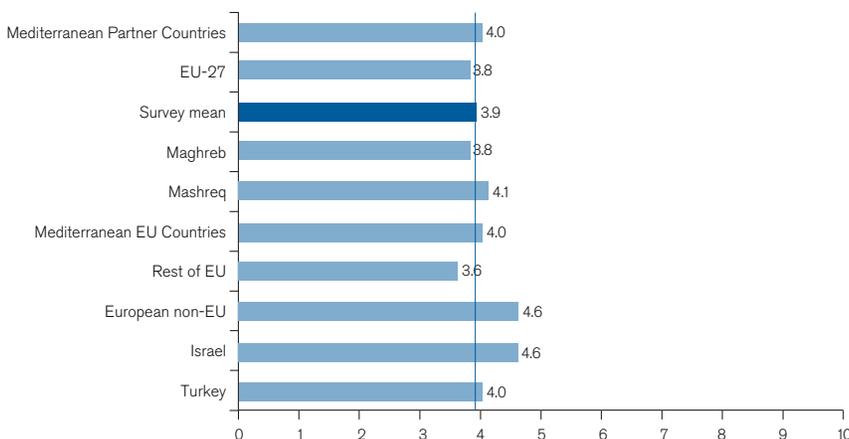
**Graph 7: Assessing the probability that the Western Sahara conflict will be solved in the near future**  
(average on a scale of 0-10)



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

Last but not least, the conflict in Cyprus seems to be, according to the figures, the one with better prospects for a resolution in the near future, even if the overall assessment still remains negative (3.8, on average). There are no big differences based on geographical distribution, the average perception of MPCs (4.0) being slightly more “positive” than the one from EU countries (3.8). The differences are not very significant either when looking more specifically at the various regions – the average grades showing very little fluctuations around the Survey mean. Only respondents from Israel, from European non-EU countries and from the Mashreq seem to be slightly more “hopeful” about the prospects for a near resolution of this conflict than the overall average, with averages of 4.6, 4.6 and 4.1, respectively.

**Graph 8: Assessing the probability that the Cyprus conflict will be solved in the near future**  
(average on a scale of 0-10)

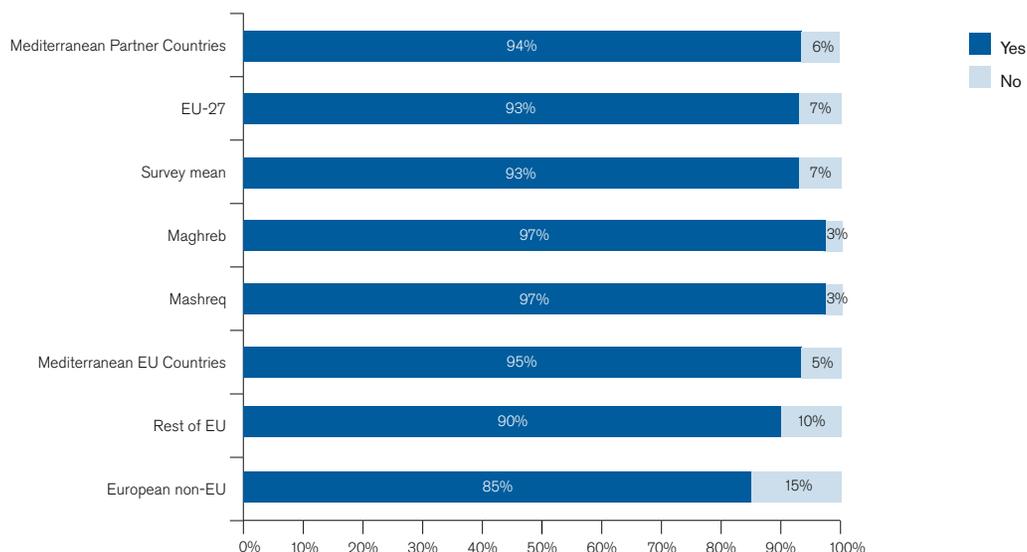


Source: Compiled by the IEMed based on the results of the 3rd Euromed Survey

Finally, the question on the role that the EU should play in conflict resolution in the Mediterranean basin has generated a unanimous response, namely that the EU should be more involved in the resolution of the abovementioned conflicts. An overwhelming majority of respondents from all the regional groups agree with such an opinion – respondents from the

Mashreq countries being the most unanimous of all the groups in terms of support (97.2%), while respondents from European non-EU countries appear comparatively as the “least” enthusiastic (85%).

**Graph 9: The EU should play a greater role in conflict resolution in the Mediterranean Area (%)**



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

On a more general note, when looking at the open-ended responses, two main criticisms about the current role of the EU in conflict resolution in the Mediterranean stand out: first and foremost, that the EU still lacks a common foreign policy and, thus, a coherent strategy towards its southern partners (i.e. the ability to speak with “one single voice”), and secondly, that the EU is not always perceived as an impartial partner in the region, this diminishing its chances of having a real influence in its conflicts. As some respondents point out, if these shortfalls persist, the EU runs the risk of losing its influence in the region to the benefit of other more pro-active actors.

À condition qu'elle se donne une politique extérieure commune et qu'elle fasse de la résolution de ces conflits, notamment celui qui oppose l'Algérie au Maroc à propos du Sahara, des éléments moteurs pour une intégration effective au sud.

Moroccan respondent

Il faudrait déjà avoir une politique étrangère commune et une vision commune.

Lebanese respondent

Provided it plays a role of an honest broker not siding with one partner in a conflict against the other. It should do so in conjunction with the US and not adopt policies that cater to Soviet and Chinese influences in the area.

Israeli respondent

The EU already pumps a considerable amount of money into initiatives, but its political positions are often incoherent and unstable over time. If the EU is to have more influence, then it needs to articulate and sustain a strategy that reflects European perceptions and interests.

Belgian respondent

Provided it is not prejudiced in favour of one party against the other, namely for Palestine.

Lebanese respondent

But the EU needs to become a much more capable foreign policy actor first, and the EEAS needs to work better.

Swedish respondent

#### Most outstanding elements:

- Overall extremely bleak picture regarding conflict resolution in the Mediterranean – the Arab-Israeli conflict being the one with the least chances of finding a solution in the near future. More encouraging prospects for the conflict in Cyprus.
- EU countries seem a bit less pessimistic overall than MPCs about a near resolution of the Arab-Israeli conflict.
- In contrast, MPCs are a little more optimistic than EU countries regarding the resolution of the Western Sahara conflict and of the conflict in Cyprus.
- There is a unanimous call for a more pro-active role of the EU in conflict resolution in the Mediterranean.

## The EU's Future Role in the Mediterranean Compared to Other Actors

When asked about the role that the EU will play in the Mediterranean in comparison to other external and regional actors, a significant majority of respondents (74%) believe that it is going to have a greater impact than its Eastern neighbour Russia. A prominent majority also thinks that the EU will be a more relevant actor to the region than Iran (68%) and China (64%). However, compared to other important regional powers, the role of the EU seems to be more balanced (48%, 52% and 45% of respondents believe that the EU will have a bigger impact on regional developments than, respectively, Saudi Arabia, the Arab League and Turkey). Finally, according to the outcome of this Survey, the US will continue to exert a stronger influence in the regional dynamics than the EU, with almost 60% of respondents supporting this.

Yet the EU has to decide whether or not it wants to be a global actor. In the present economic recession it might be difficult for the EU to re-develop its Euro-Mediterranean policy. At this stage cultural actors can play a key role.

Turkish respondent

It all depends on how long in the future we dare to look. In terms of regional cooperation I don't think that China, Iran, Russia or Saudi Arabia will have that much to bring to the table, but that does not mean that these actors will impact developments and relations among other actors in the region. The US will probably have less and less to say, but it will still be a very influential actor in the future as well.

Swedish respondent

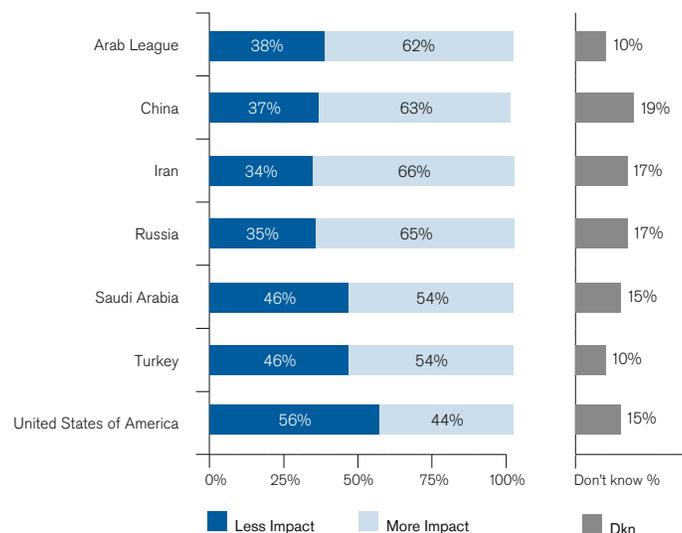
The regional powers which also share the Islam religion have various influences on the Mediterranean Partner Countries which cannot be entirely assessed. It is, however, obvious that the EU has more impact due to its geographical situation, its historic links, etc., than any other country outside the region (Russia, China). The US has of course an enormous impact on the Middle East conflict situation and thereby on many other aspects of the developments in the region via its support to Israel.

Dutch respondent

When taking the North/South dimension into account, some noteworthy variations concerning the relative role of the different actors in the region come to the fore. Though the overall picture remains the same – the US continuing to have stronger influence than the EU in the years to come, while Iran, Russia, China and the Arab League are expected to have comparatively much less influence according to both EU and MPC respondents –, there are some noticeable changes regarding the relative weight of some actors. For instance, respondents from MPCs predict a more prominent role of the EU in the region compared to Turkey, Saudi Arabia or the Arab League, while they slightly increase the relative influence of Russia. By countries, it is striking that Israel is the only country with a majority of respondents considering that Iran is going to have a stronger impact in the region than the EU.

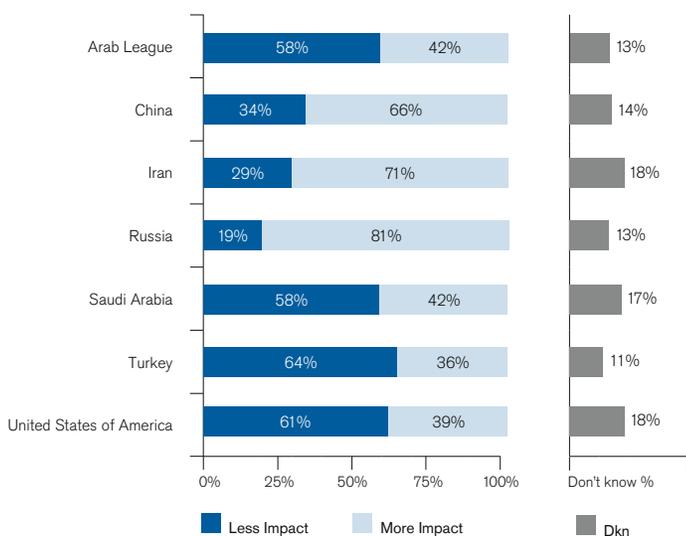
Israeli respondents also attribute greater weight to the influence of Russia in the region compared to the general average of MPCs, even though they still consider the EU as playing a comparatively stronger role. Respondents from EU countries seem, on the contrary, more moderate about the role of the EU compared to the regional actors and give more relative weight to Turkey, Saudi Arabia and to the Arab League. Moreover, they further emphasise the stronger leverage of the US compared to the EU, while they minimize the relative influence of Russia.

**Graph 10: Assessing the EU's future role in the Mediterranean Partner Countries compared to other external and regional actors. Will the EU have more or less impact on regional developments compared to: (MPC respondents)**



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

**Graph 11: Assessing the EU's future role in the Mediterranean Partner Countries compared to other external and regional actors. Will the EU have more or less impact on regional developments compared to: (EU respondents)**



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

Les échanges avec l'UE sont de loin supérieurs qu'avec chacun de ces pays. L'aide au développement est la plus importante pour la majorité des pays du sud. [...] Enfin l'UE est perçue comme la plus respectueuse des structures politiques des nations. Sur un plan, il se peut que les faveurs aillent à l'un ou l'autre de ces pays, ou organisations. Mais dans l'ensemble il est difficile de supplanter l'UE.

Lebanese respondent

L'influence américaine et européenne dans la région semble s'équilibrer et aller dans le même sens, avec tout de même plus d'Amérique à l'Est de la Méditerranée et plus d'UE à l'Ouest. Quant à l'influence de la Turquie, elle semble boostée par la référence faite de plus en plus fréquemment au « modèle turc » notamment par des partis portés récemment par des élections comme celles qui ont eu lieu en Tunisie et au Maroc et qui ont mis au devant de la scène les partis islamistes d'Ennahda et du PJD.

Moroccan respondent

La Chine est très présente sur le plan économique, mais a moins d'influence politique que l'UE. Pays très conservateur, l'Arabie Saoudite, malgré de petits progrès récents, n'encourage pas la démocratie dans les autres pays arabes. L'UE a moins d'influence que la Turquie dans le monde arabe et l'on peut se demander si l'UE n'a pas d'intérêt à accélérer son intégration.

French respondent

Les changements en cours dans le monde arabe ne risquent pas de bouleverser la configuration des rapports de forces en cours. On assistera à un rôle accru de la Turquie, mais les acteurs traditionnels comme l'Arabie saoudite les, États-Unis continueront à peser de tout leurs poids sur les dynamiques régionales et locales.

Algerian respondent

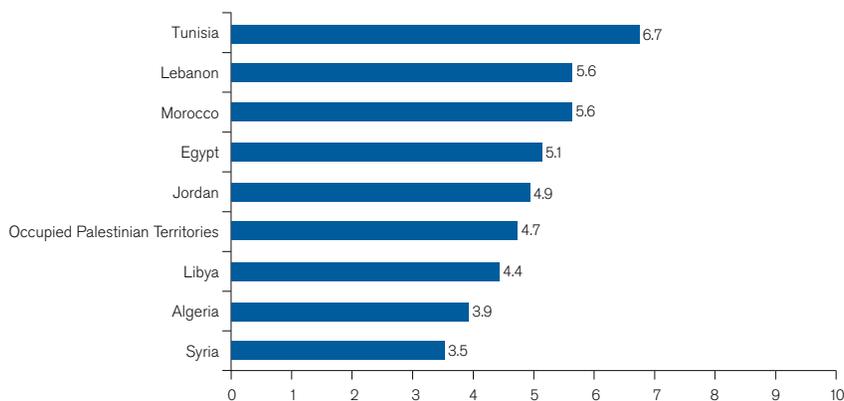
**Most outstanding elements:**

- Overall, the EU is expected to play a much stronger role in the region than Russia, China and Iran, while its role is seen as more balanced/moderate when compared to the one played by other regional actors such as Saudi Arabia, Turkey or the Arab League.
- When considering the geographical dimension, some differences concerning the relative weight of some actors come to the fore: while MPCs attribute a greater role to the EU compared to other regional powers, respondents from the EU are more moderate about their role and give more relative weight to the regional actors (Turkey, Saudi Arabia and the Arab League).
- MPCs give Russia a stronger weight in the region – even if it is still expected to have less influence than the EU –, while respondents from the EU give it a minor role (i.e. the country exerting the least influence in the region).
- Israel is the only MPC country with a majority of respondents giving Iran a stronger role in the region compared to the EU.

## Role of Political Islam and Prospects of Sustainable Democracy in the New Mediterranean Landscape

On the question about the prospects of sustainable democracy in the southern Mediterranean neighbours' responses are quite varied depending on the country in question. Tunisia is by far the country with the best prospects for following a sustainable democratic path (with an average prediction of 6.75 on a scale of 0 to 10 – 10 being the most positive grade), followed by Lebanon and Morocco (on equal footing with an average of 5.63), Egypt (5.09) and Jordan (4.94). With average predictions of 3.86 and 3.48, respectively, Algeria and Syria are seen as the two countries with the lowest probabilities of developing sustainable democracies, even far below the chances of the Occupied Palestinian Territories (4.74) and of Libya (4.37).

**Graph 12: Assessing the prospects of sustainable democracy in the following countries**  
(average on a scale of 0-10)

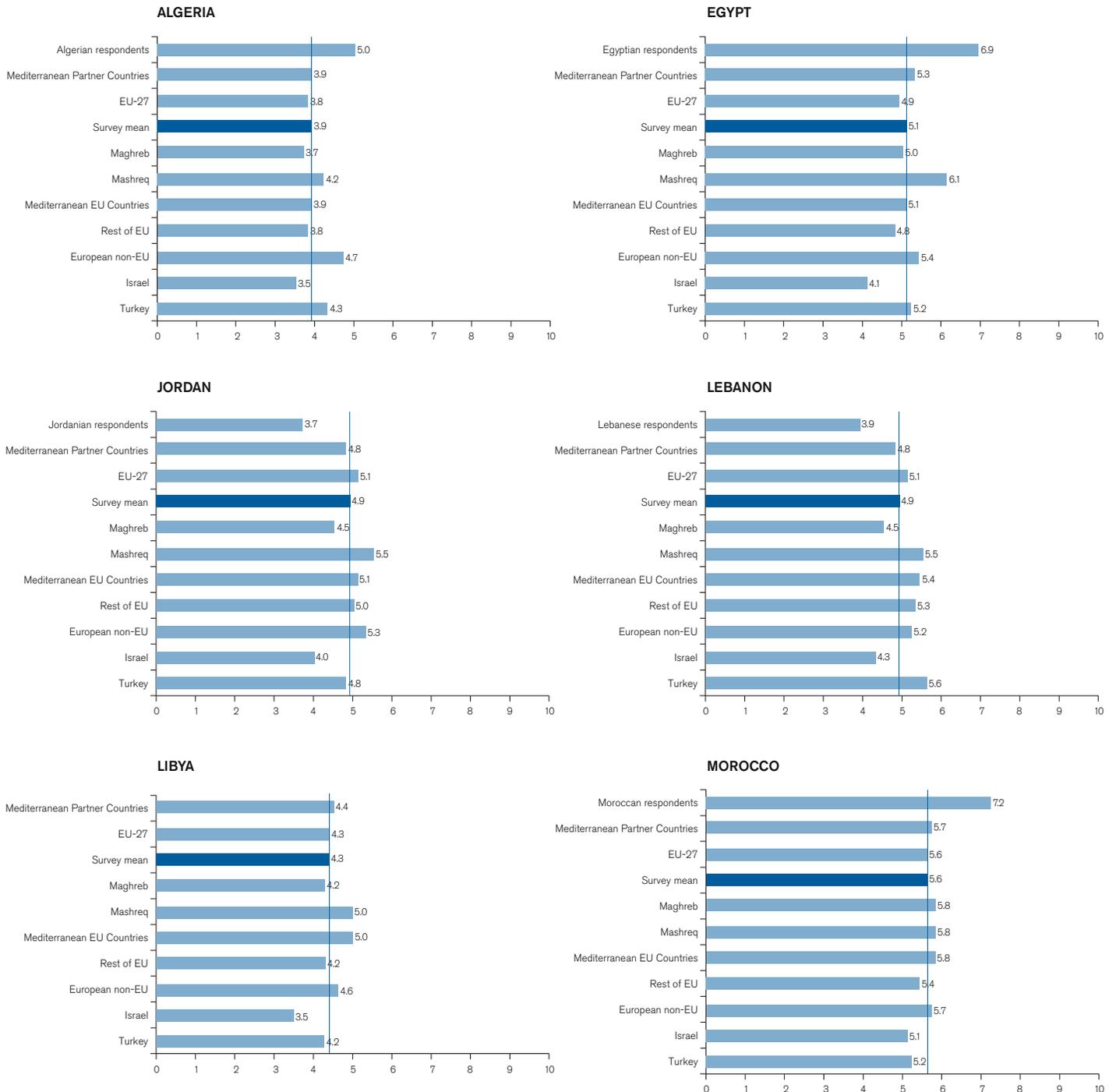


Source: Compiled by the IEMed based on the results of the 3rd Euromed Survey

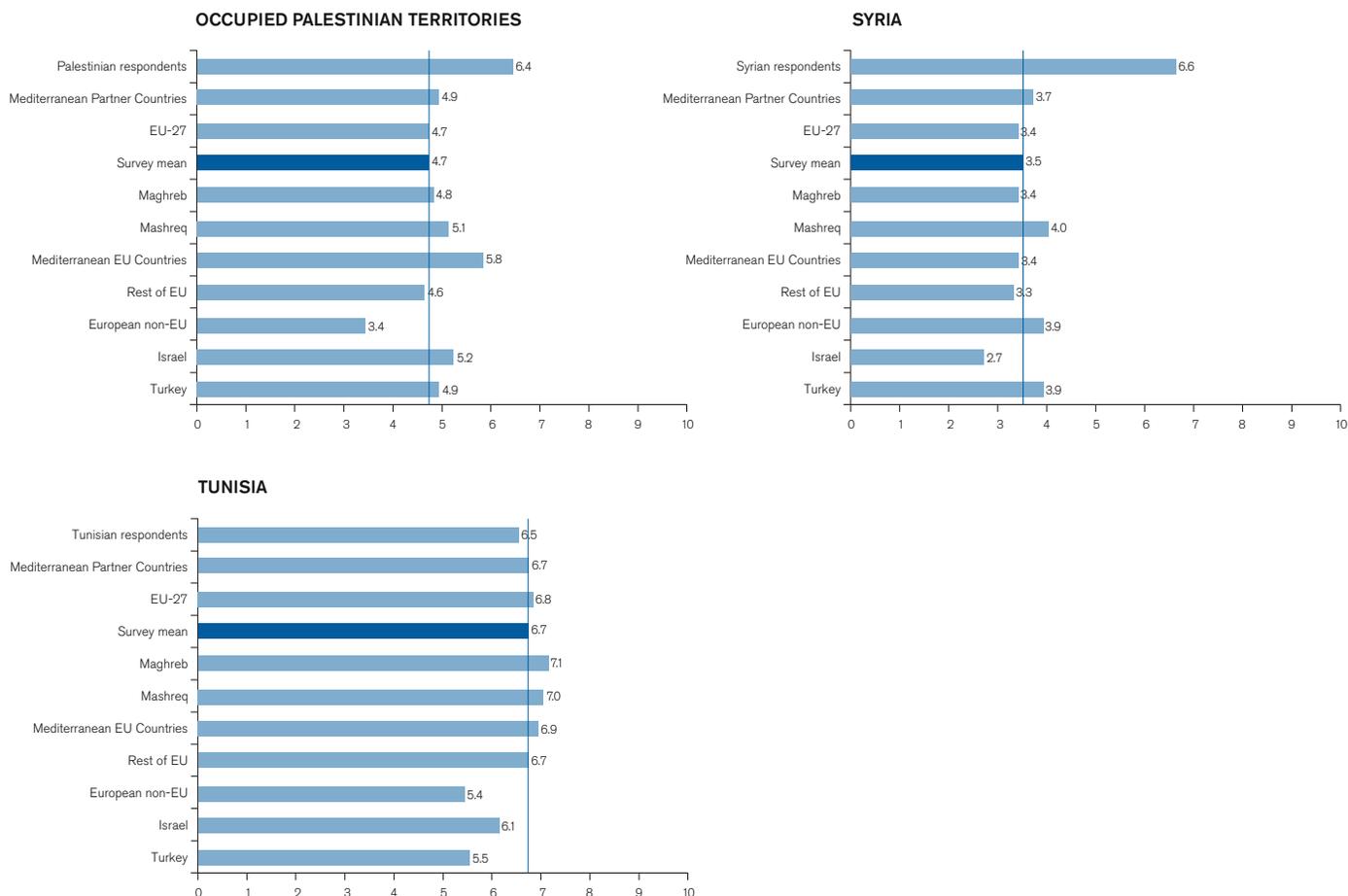
When looking specifically at the distribution of responses to the prospects of democracy in each of the countries by regional groups, there are some commonalities which are worth noting. First of all, respondents tend to be over-optimistic about the prospects of democracy in their own countries compared to the general perception (see for instance Morocco, the Palestinian Occupied Territories and Syria in the graphs below) – an exception is made for Jordan, Lebanon and Tunisia, where the Survey mean is higher than the average assessment given by their respective nationals.<sup>1</sup>

1. Note that there is no average assessment grade from Libyans about the prospects of a sustainable democracy in their country. This is due to a lack of a critical mass of respondents from that country which could be considered as representative.

**Graph 13: Assessing the prospects of sustainable democracy in:**  
 (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 Euromed Survey



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

The second feature which stands out in most of the graphs is the overall comparatively positive assessment of the prospects of sustainable democracies in the different MPCs given by Turkish and European non-EU respondents – an exception is made for the democratic prospects of the Palestinian Occupied Territories and of Tunisia in the case of European non-EU respondents, and of Morocco and Tunisia in the case of Turkish respondents, in which cases the Survey mean is higher than the average assessment given by them. The case of Tunisia is particularly notable in this regard, as respondents from all other regional groups have assessed the democratic prospects of this country quite positively with average grades over 6, all of them well above the average grades given by respondents from Turkey and from European non-EU countries.

Finally, one last salient feature which stands out in the figures is the comparatively positive assessment of Israel concerning the prospects of democracy in the Palestinian Occupied Territories (5.1), well beyond the Survey mean (4.7) and only below the Palestinian respondents' own assessment (6.3) and the average assessment provided by respondents from the Mediterranean EU countries (5.8).

Après la phase de découverte de la démocratie et l'engouement pour les tendances « islamistes », avec un effort de sensibilisation, d'éducation et de formation, la démocratie durable s'imposera inévitablement, c'est une question de temps et de formation.

Moroccan respondent

Unfortunately, the concept of democracy in the Arab countries does not exceed 10%. We need to educate in all areas of life to establish the concept of democracy, and this is the responsibility of educational and cultural institutions, and that is the responsibility of the state and by allowing for the establishment of political parties to compete for government.

Jordanian respondent

At this early stage, one can only be optimistic and hopeful. Success depends on the decisions which will be taken later. However, this is a historical paradigm shift among the Arab peoples and change is inevitable. The process of change is, however, very slow and any attempt at expediting reforms would be counter-productive.

Maltese respondent

En dehors des deux pays ayant une expérience démocratique (Palestine-Liban), pour l'instant seule la Tunisie a réuni les conditions politiques ; en Égypte le jeu est brouillé par l'armée aux commandes ; en Libye la situation n'est pas encore claire.

Egyptian respondent

Les situations sont très variables et les transitions seront encore longues avant d'atteindre une situation de stabilité politique et institutionnelle normalisée (hormis peut-être pour la Tunisie, Maroc et Palestine). La dégradation de la situation socio-économique est un facteur, dans le contexte actuel, favorable aux partis islamiques et islamistes

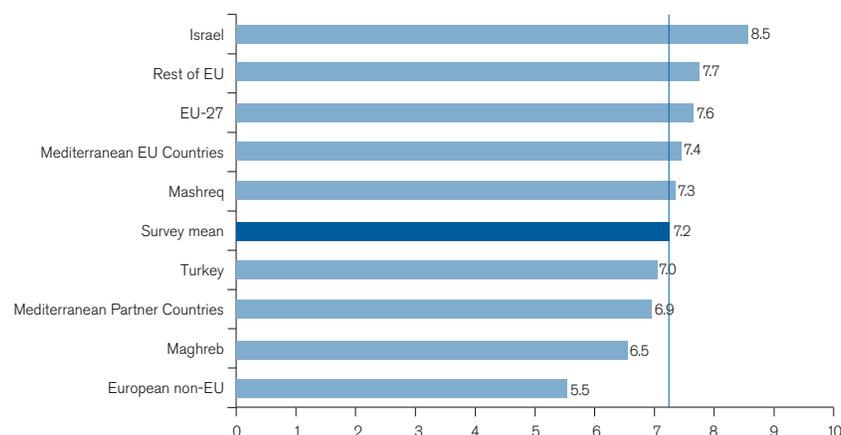
Belgian respondent

Regardless of the democratic outlook in the various MPCs, political Islam – the winner of the Tunisian, Moroccan and Egyptian elections, and more generally of the Arab Spring – is deemed to play a key role in the Mediterranean landscape according to respondents from all regional groups. On a scale from 0 to 10 – 10 standing for “key role” and 0 standing for “negligible role” –, respondents have assessed the future role of political Islam with an average grade of 7.28. In other words, they expect political Islam to play a very important role in the region in the coming years. When examining the responses on this issue per regional group, Israel appears clearly as the country whose respondents expect political Islam to play the greatest role in the Mediterranean basin (8.54). The second regional group to consider that political Islam will exert a strong influence in the region in the years to come is the one composed of respondents from the “Rest of the EU” (7.79),<sup>2</sup> immediately followed by the group of respondents from the EU-27 (7.64) and from the Mediterranean EU countries (7.48). Respondents from the Maghreb, from Turkey and from European non-EU countries seem in contrast somewhat more moderate about the role of political Islam in the region, giving it average prediction grades of 6.49, 6.95 and 5.58, respectively – all of them below the Survey mean.

2. The label “Rest of the EU” embraces the following EU countries: Austria, Germany, Denmark, Sweden, Belgium, the Netherlands, Luxembourg, the UK, Ireland, Finland, Latvia, Lithuania, Estonia, Poland, Czech Republic, Slovakia, Hungary, Romania and Bulgaria – in other words, the non-Mediterranean EU countries.

**Graph 14: Political Islam's role 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 3rd Euromed Survey

On the other hand, the information provided in the open-ended questions matches the conclusions of the quantitative analysis in that most respondents agree that moderate political Islam has been the clear winner of the Arab Spring and will continue to play a prominent role in the region. The fact that the majority of respondents expect political Islam to play an important role in the coming years does not, however, mean that they are necessarily enthusiastic about this change in the political Mediterranean landscape. Actually, several respondents seem quite wary about the current so-called “moderate” tradition of political Islam being overridden in the long run by a more fundamentalist doctrine. To counter this, some argue that the best policy is to offer support to the newly-elected Islamic governments, rather than trying to isolate them, as this would only make matters worse. Some others point at the Turkish example as a model for democracy in the Arab countries. The following quotes exemplify such views:

Les scores électoraux réalisés par les islamistes sont éloquentes – la meilleure politique consisterait à soutenir et accompagner la démocratie « islamiste » plutôt que la provoquer. Se déclarer hostile aux islamistes au pouvoir les renforcera davantage.

Moroccan respondent

Existe un apoyo notable al Islam político debido a la aceptación y popularidad interna de la cual goza dicho sector que se traduciría en estabilidad interna por un tiempo. Y lo más seguro es que será necesario para el cambio en los países de la zona.

Spanish respondent

L'Islam politique jouera un rôle clé ; la réussite du modèle turc est un exemple que veulent suivre les pays du Sud, entre modernité et islam.

Tunisian respondent

Political Islam will be key in most countries in the region, but it will not be fundamentalist Islam. Al Qaeda has played no role at all and is conspicuous by its absence in the debate in every country. The Salafists in Egypt are in a minority and will remain so. Moderate Political Islam, with Turkey as a model, will be the dominant force, but with significant variation country by country.

British respondent

En dépit du vent en poupe qu'a actuellement le courant dit islamiste modéré, les partis qui se réclament de cette mouvance connaîtront des difficultés certaines dans la gestion des affaires publiques et seront sous la pression et les exigences de cercles islamistes plus radicaux. Je ne pense pas qu'il existe un islam politique modéré dès que des partis s'engagent dans la lutte pour le pouvoir. Il y a cependant un islamisme modéré et un islamisme extrémiste dans la pratique religieuse et dans la conception du projet de société.

Algerian respondent

**Most outstanding elements:**

- Tunisia is the country with the best prospects for democracy, while Algeria and Syria are seen as the countries with the lowest probabilities of following a sustainable democratic path.
- Respondents tend to be over-optimistic about the prospects of democracy in their own countries compared to the general perception (i.e. the Survey mean) – exception made for Jordanian, Lebanese and Tunisian respondents, who tend to be more moderate.
- Overall comparatively positive assessment of the democratic prospects in all MPCs given by Turkish and European non-EU respondents – exception made for the Occupied Palestinian Territories and Tunisia in the case of European non-EU respondents, and for Morocco and Tunisia in the case of Turkish respondents.
- Positive assessment of Israeli respondents about the prospects of democracy in the Occupied Palestinian Territories compared to the general perception.
- Regardless of the democratic prospects in each of the MPCs, political Islam (in its “moderate” approach) is expected to play a key role in the coming years according to respondents from all regional groups.