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# PRESENTATION

**SENÉN FLORENZA.** Executive President, IEMed.

The European Institute of the Mediterranean (IEMed), after being entrusted by the European Commission to conduct a yearly Survey of actors and experts on European-Mediterranean relations for the period 2009-2012, has carried out the 5th Survey with the aim of offering a way for experts and actors to express their evaluation of the Euro-Mediterranean relations, as well as to put forward proposals for decision-makers to address the challenges of the democratic transitions in Mediterranean Partner Countries.

This Survey was conducted three years after the beginning of the so-called Arab Spring, in a regional landscape where a military-led government had changed the situation in Egypt, and the Syrian war continued to destabilise the neighbouring countries. These elements led us to draft a questionnaire focused on the short- to mid-term scenarios following the domestic and geopolitical transformations in the region, the state of play of democratic transitions and the role of the European Union.

Furthermore, the questionnaire was designed to capture three main elements: an assessment of current transformations in the countries of the region; the assessment and points of view of respondents on these changes and, a forward-looking analysis of the region. The fieldwork of the present Survey was conducted between January and March 2014, coinciding with the third anniversary of the Arab uprisings and at a time when political transitions in the region were underway and a new mapping of actors was still being shaped. A total of 838 experts, policy-makers and civil society representatives from the 43 member countries of the Union for the Mediterranean (UfM) have participated in this year's Survey.

As regards the structure, the report is divided into two main parts: a qualitative section meant to interpret and shed light on the results obtained, and a descriptive analysis of the quantitative data. For the preparation of the qualitative section, which consists of 12 articles in total, the participating experts were requested to analyse the results of the 5th Survey in light of the state of play in the Arab countries, while also taking into account the latest developments in the Euro-Mediterranean institutional architecture.

The results of the Survey on the transformations in the region show a clear contrast between the negative assessment of the most recent past and the openly positive long-term vision. They also show that there is a clear perception of greater multipolarity in the region.

In terms of strategies and policies, the main result reveals that there is still room for Euro-Mediterranean policies to have a more positive impact on strengthening democracy and good governance. This potential for improvement could be mainly based on developing a differentiated policy agenda at country level and, secondly, by changing the geographical definition of neighbourhood.

Indeed, from the results on EU policies, it has to be underlined that they show a lack of enthusiasm for neighbourhood policies. This may be linked to the fact that the heterogeneity of country situations, particularly in terms of political stability, drives a differentiated policy agenda. Moreover, as previously mentioned, the results of the Survey reveal that the present transformations are also affected by changes taking place beyond the neighbouring countries, and this could drive us to think about the geographical definition of the neighbourhood.

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# THE FIFTH EUROMED SURVEY

## I. METHODOLOGY

The 5th Euromed Survey has been carried out in a regional scenario transformed after the three intense years of change that started with the Tunisian uprising in 2011. With the objective of analysing these changes from both the perspective of the consequences of these transformations and from a medium and long-term forward-looking analysis, the questionnaire was designed to identify elements in terms of assessment and prospective.

These typologies of questions are found across the three thematic blocks of the questionnaire. The first block approaches the issue of the transformed Mediterranean from both the regional and domestic point of view of the Southern Mediterranean countries. The second block addresses the strategies that the EU is carrying out faced with this transformed neighbourhood. And, finally, the third thematic block assesses the EU policies in the Mediterranean.

The fieldwork was undertaken between January and late March 2014, a time when the new scenarios that emerged from the changes in the region were being consolidated, such as the return to military-led government in Egypt, the difficult democratisation in Tunisia and the social unrest in Turkey immersed in local elections. Simultaneously, in Syria, the civil war was ongoing and without a clear peace scenario in sight.

In this framework, the analysis of two elements is especially relevant. One focuses on the changes at a domestic level brought about by these processes of transition and change. The other element focuses on the regional dimension, the most outstanding actors and the geopolitical changes experienced by the Mediterranean. Moreover, complementing this internal-external analysis we must debate how the EU is resituating its strategies and priorities in the Euro-Mediterranean area.

Three different blocks try to identify these themes. In the first block, two questions allow us to take the pulse of the changes in governance and socioeconomic policies of the Southern Mediterranean countries by asking about improvement or deterioration in the last three years, as well as the medium and long-term evolution. This block also includes questions about the impact of the international actors in the region as well as the consequences of the war in Syria.

The second and third blocks place more emphasis on the role the EU can have in this changed framework. The second block of questions focuses on the role that the European Union will have in the development of a multipolar neighbourhood; that is, the influence that it can continue to have in the MPCs after the political changes in the region. The third block aims to monitor and identify the assessment of the regional policies and programmes during 2013; that is, questions related to the Euro-Mediterranean integration process, in a year when the ENP is being re-approached and the UfM is tentatively beginning to launch its programmes.

As far as the methodology is concerned, most of the questions include a box for comments. Given the complexity of the current situation and the diversity of opinions, we considered that it would be indispensable to offer this possibility to fine-tune responses or to add, for instance, suggestions or options other than those proposed in the questions. It should also be noted that the "Don't know" option is of importance as it provides significant information in terms of the knowledge of the experts and actors of the variety of policies and actions proposed and implemented by the EU.

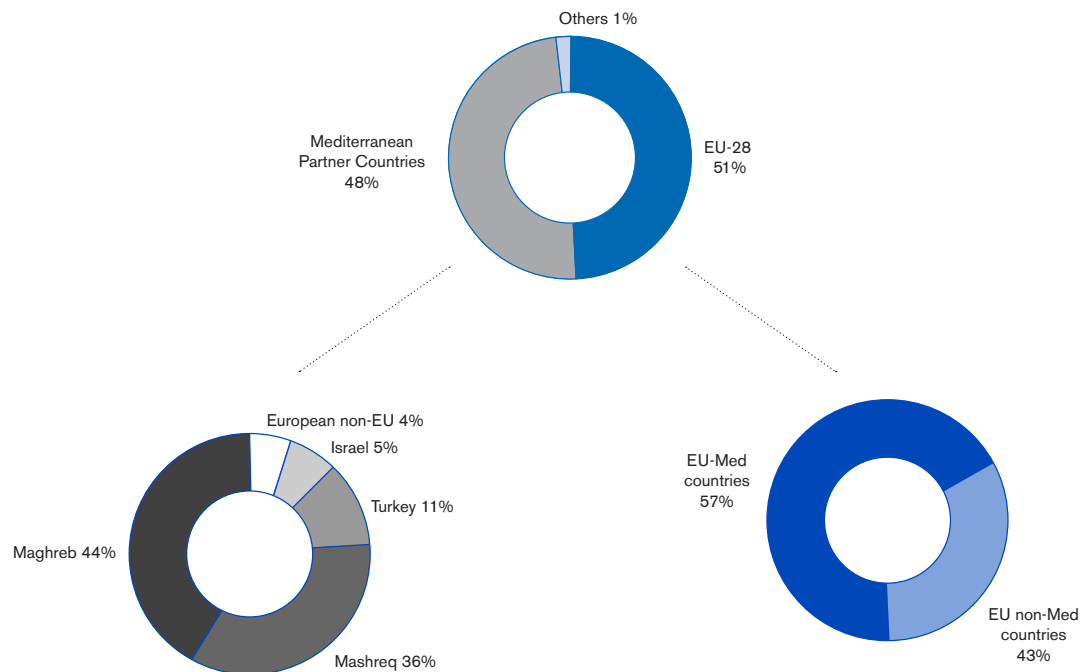
Given the success of the previous surveys, both in terms of the number of respondents and quality of the proposals made and because of the importance of the current developments in the region and beyond, this questionnaire is of particular importance. Therefore, experts and actors have a means to express their hopes and concerns but also the possibility to put forward proposals that could help decision-makers to define and implement new changes to address the challenges of the democratic transition in the MPCs.

## II. SURVEY SAMPLE

To conduct this Survey, a universe of 4,650 experts, actors and policy-makers from the 43 countries of the Mediterranean and the European Union was selected, all of whom received an invitation to participate in the Survey. As in previous years, geographical distribution, institutional typology, field of knowledge and gender balance were the reference criteria for selecting the universe, as well as knowledge of and involvement in the Euro-Mediterranean Process. Out of this broad universe, a sample of 838 responses was received.

Concerning the distribution of the answers, 48% (3% more than in the last Survey) came from the so-called Mediterranean Partner Countries (hereafter MPCs), including all the countries of both the Euro-Mediterranean Partnership and the Union for the Mediterranean, and 51% came from the EU-28 members, which now include Croatia.

**Graph 1: Breakdown of responses by geographical origin: EU-28 and Mediterranean Partner Countries (EMP + UfM)**



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

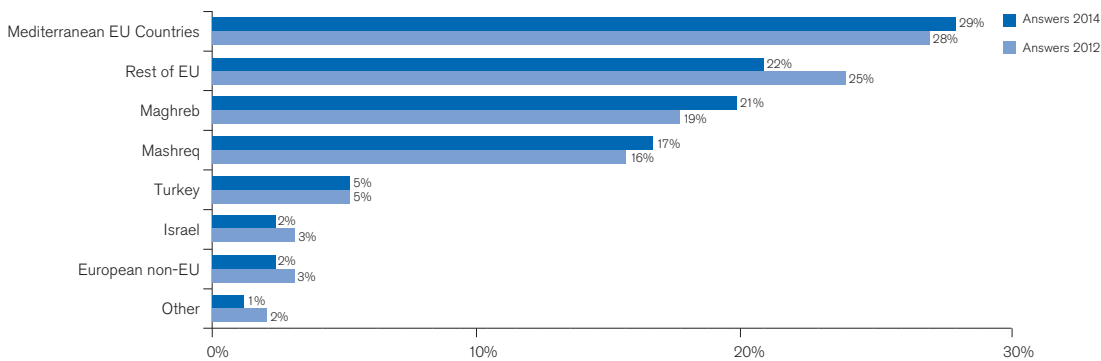
As to the distribution of responses per region, the Mediterranean EU countries<sup>1</sup>, the remaining EU countries and those of the Maghreb<sup>2</sup> account for the bulk of the responses (with a 29%, 22% and 21% participation rate, respectively). This indicates continuity on the percentage distribution of the three most important groups of countries, where the Mediterranean EU have a light growth of 1% while the other regions experience a decrease of almost 3% (EU countries) and a growth of 2% for the Maghreb. Mashreq<sup>3</sup> countries come in fourth position with 17.3% of responses, with an increase of about 2% compared to the previous Survey.

1. Spain, France, Italy, Portugal, Malta, Cyprus, Greece, Croatia and Slovenia. The first three alone account for nearly 73% of responses from this region.

2. Maghreb countries include Morocco, Algeria, Tunisia, Mauritania and Libya. The first three alone account for 95% of responses from this region.

3. Mashreq countries include Egypt, Jordan, Lebanon, the Occupied Palestinian Territories and Syria.

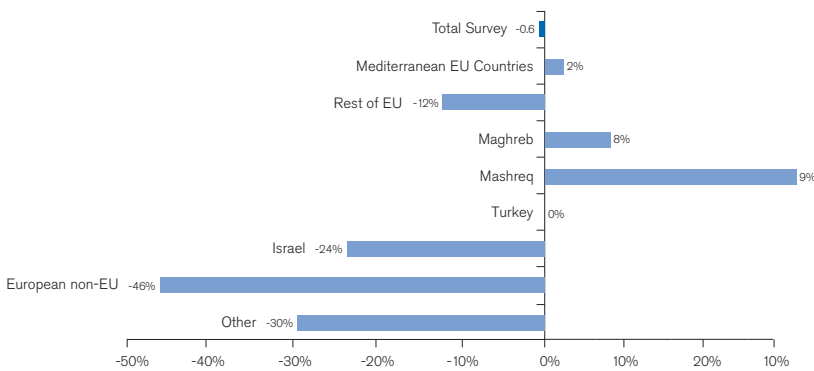
**Graph 2: Breakdown of respondents by region (in %)**



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

Graph 3 shows the changes in comparison to the previous Survey. While the total number of responses has reduced by 5, meaning 0.6% in terms of the previous year, the distribution of this slight decrease is heterogeneous. Specifically, the group of European countries that are not members of the EU has reduced, because Croatia is member 28 of the EU and consequently it has changed regional group.

**Graph 3. Euromed Survey: comparison 2012 and 2014. Growth of country regions**



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

Moreover, the reduction in responses from Israel and non-Mediterranean EU countries is remarkable. In contrast, responses from the countries most affected by Euromed policies have grown: Maghreb, Mashreq and the EU-Med.

## Weighting the results

The participation this year has been more numerous than in previous years, and its distribution by country has followed a pattern that is different from the initial target, with some countries very over-represented and others with representation below the objective established. In order to avoid bias in the results, we have weighted the results according to distribution of the target by the countries in the sample.

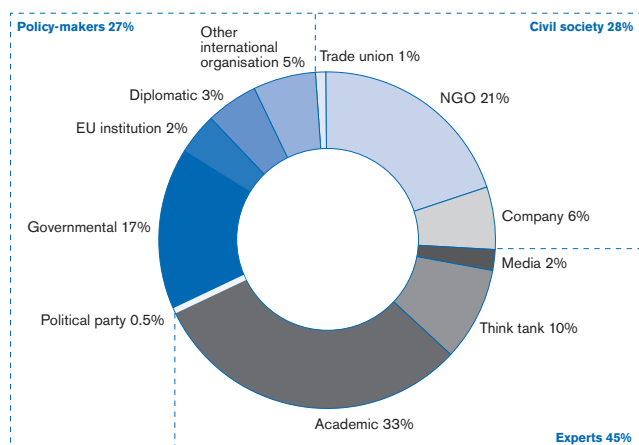
With this weighting we avoid the over-represented countries of Spain, France, Italy, Morocco and Tunisia largely determining the results of respondents overall.

## Responses according to profile of respondents

In the first block of questions, in addition to providing their country of origin, respondents were asked to indicate their gender and age range, the type of institution they belonged to (i.e. EU/international organisation, think tank, NGO, business sector, trade union, media, etc.), as well as their main and, where applicable, secondary field of specialisation.

As shown in the graphs below, the majority of respondents to the questionnaire can be understood as “experts”, an aggregated category which includes respondents from think tanks, media and, above all, academia. Altogether, these groups roughly account for 45% of the total number of responses. This umbrella category is followed by “civil society”, encompassing trade unions, companies and mainly NGOs. Altogether, these groups account for 28% of the total number of responses. Finally, the comparatively smaller but still well-represented category is “policy-makers”, which embraces all responses from diplomatic bodies, European or international institutions, political parties and governments – this latter group accounting for the largest share of responses.

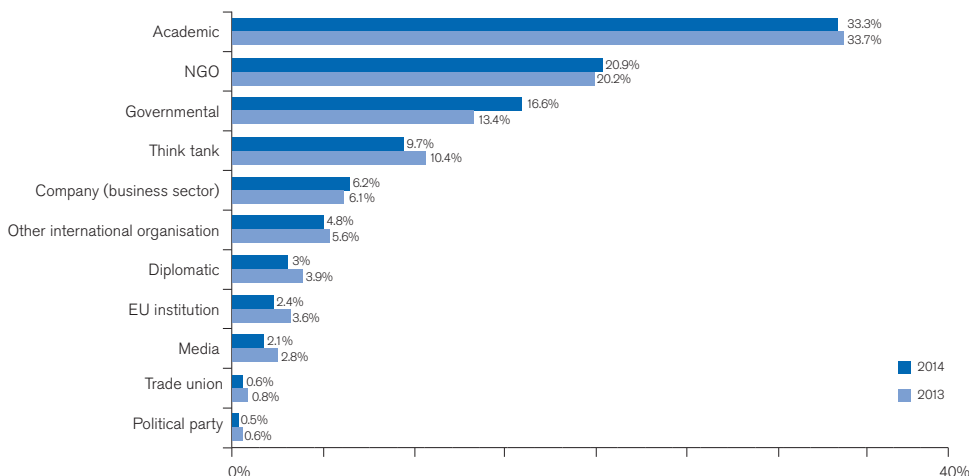
**Graph 4. Breakdown of respondents by type of institution**



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

When looking specifically at the individual groups (see graph 5 below), academia clearly emerges as the most represented institution (33.3% of total responses), followed by NGOs (20.9%) and government bodies (16.6%). Altogether, these groups account for more than two thirds of the total responses. If we then compare the relative participation of the different groups in 2014 with their participation in the last Survey, there seems to be an overall continuity, though a growth of 3% can be observed in the response rate from government institutions and a higher rate of NGOs. The remaining categories have slightly lower rates, the most important being the representatives of EU institutions with a reduction of 1.2%.

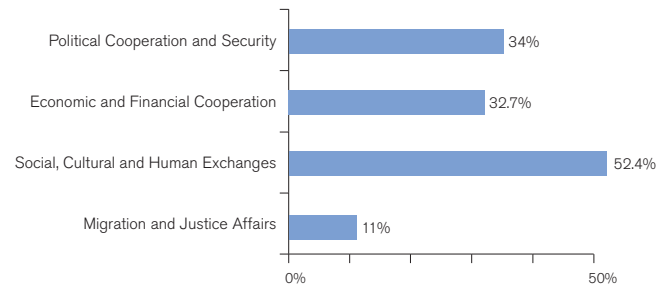
**Graph 5. Breakdown of respondents by type of institution**



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

Respondents were also asked about their main sector of activity and were given the opportunity to indicate one or two areas of specialisation. As shown in the graph below, which features aggregated figures for main and secondary areas of specialisation, more than half of the respondents operate in the area of “social, cultural and human exchanges”. “Political cooperation and security” ranks second as the main area of specialisation of respondents (34%), immediately followed by “economic and financial cooperation” (32.7%). Finally, “migration and justice affairs” comes in fourth place with only 11%.

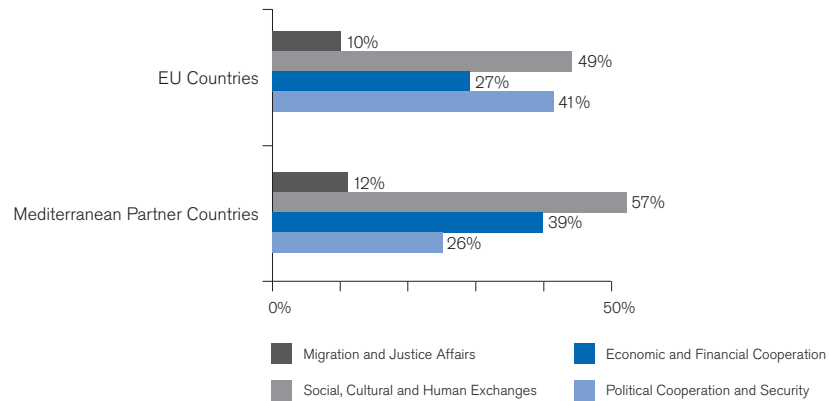
**Graph 6. Breakdown of respondents by area of specialisation**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey  
 (Respondents could indicate one or two areas of specialisation. This graph shows aggregated totals for first and second choices as areas of specialisation. This is why the total percentage exceeds 100%.)

When analysing the previous figures by factoring in the geographical dimension, we can conclude that north and south are mainly specialised in social, cultural and human exchanges. The main difference is in the second arena, where MPCs are more specialised in economic and financial cooperation, whereas EU countries are comparatively more focused on political cooperation and security.

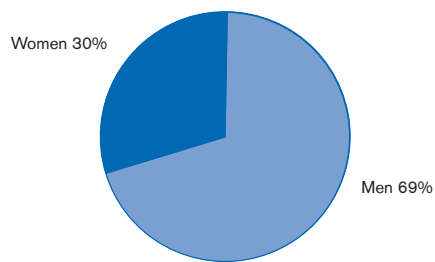
**Graph 8: Breakdown of respondents by area of specialisation and by region**



Source: Compiled by the IEMed based on the results of the 5th Euromed Survey  
 (Respondents could indicate one or two areas of specialisation. This graph shows aggregated totals for first and second choices as areas of specialisation. This is why the total percentage exceeds 100%.)

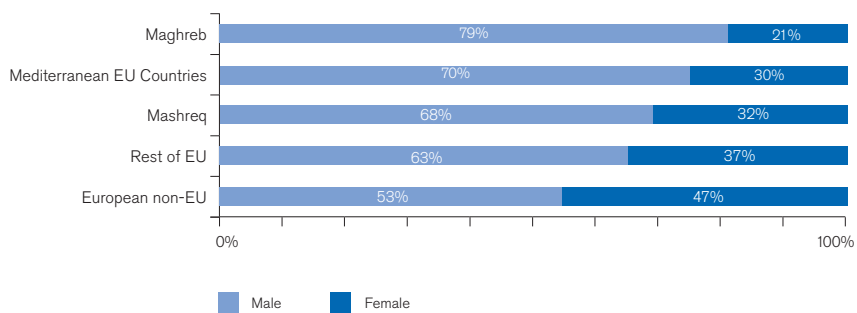
Finally, to complete the description of the sample on which this Survey is based, it is important to note that that 30.1% of respondents are women, in line with the gender balance of the last Survey (see graph 9). When analysing the North/South dimension, the aggregate proportion of women amounts to 26.8% for MPCs, while it increases to 33.3% for EU countries. By regional groups, the Maghreb stands out as an outlier with around 20.6% of female participation, while the other regions, including the Mediterranean EU countries and the Mashreq, fall within the overall gender ratio (see graph 10).

**Graph 9: Breakdown of respondents by gender**



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

**Graph 10. Breakdown of respondents by gender and regional groups**



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

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# SYNTHESIS OF RESULTS

## General Assessment of the Euromed Survey

In the Southern Mediterranean region, social, political and economic elements are perceived to have negatively evolved in the most recent past. In contrast, there is an openly positive long-term vision, with the exception of Libya and Syria. The region has also witnessed a growing multipolarity. The EU still keeps its role as an influential player in the field of economy and trade, but much less in political and diplomatic terms. The USA is still a key player in shaping regional developments and Russia and Iran have stepped in firmly to secure their strategic interests.

It is largely agreed that the EU should continue to support democratic transitions and socio-economic developments in the region, revealing that there is still room for Euro-Mediterranean policies to have positive impacts on strengthening democracy and good governance and there is also room to achieve higher degrees of visibility and impact.

## Block 1: Domestic and geopolitical changes in the Euromed region

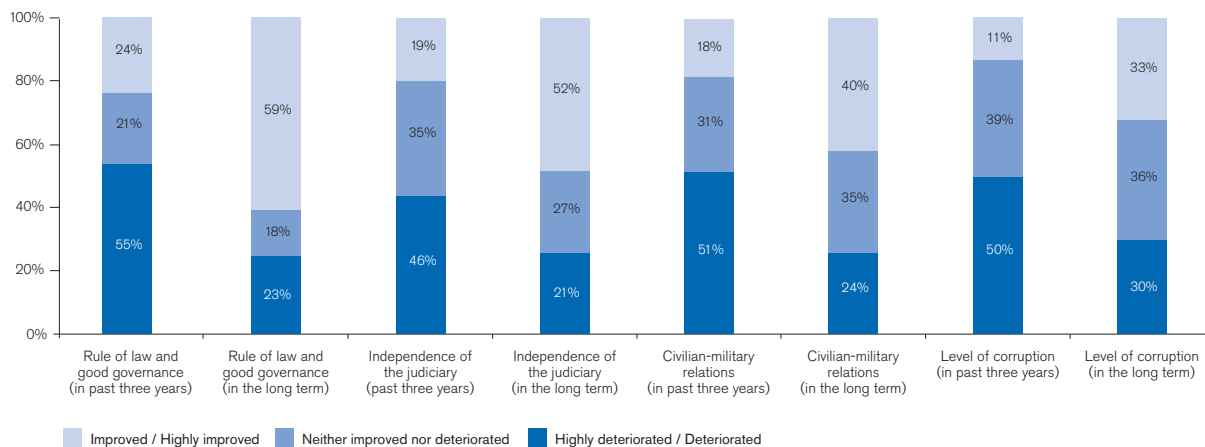
### Changes in the Southern Mediterranean region

The assessment of the developments in the Southern Mediterranean region in the last three years is mostly negative. The elements that according to over 60% of respondents have most deteriorated are the living standards of citizens and economic prospects for the region. More than a half of respondents also consider the governance-related elements to have worsened.

Nevertheless, the forward-looking opinions are quite optimistic. Among the most positive assessments are freedom of expression and press, rule of law and good governance and status of women. However, concerning the level of corruption and civilian-military relations little improvement is expected.

The main difference between expectations and the current situation is seen in the rule of law and good governance as well as freedom of expression and press. The optimism becomes more moderate in the relation between civil and military power and in the improvement in corruption level.

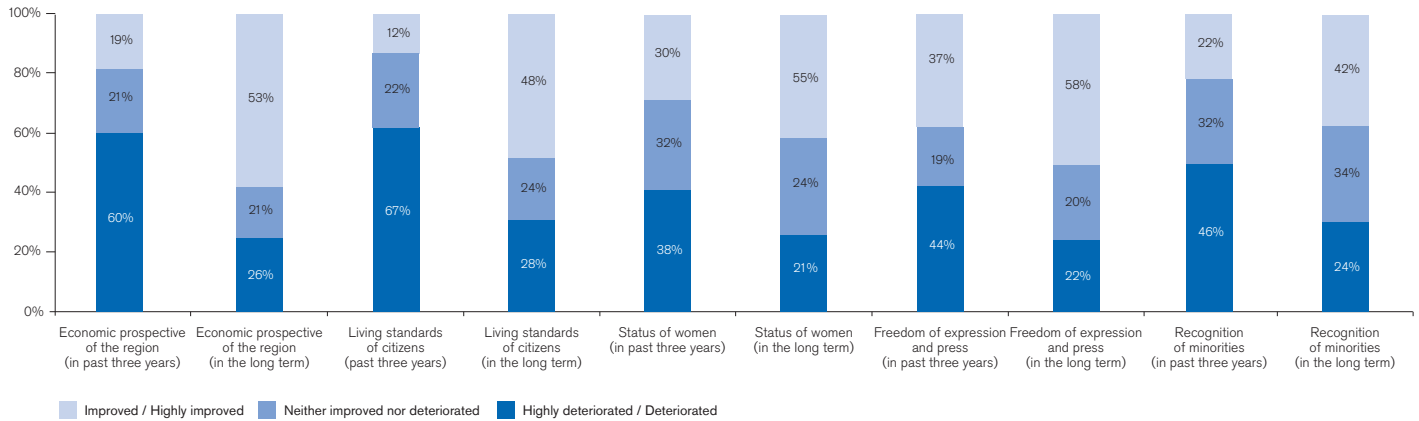
**Graph 1: Comparing the improvement or deterioration in the past three years and in the long term on governance elements**



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

For economic elements, the results show that there has been a major decline in the last three years but there is great hope for improvement. In the social field, there has been a less negative evolution in the last three years. The situation of the status of women and freedom of expression are assessed positively by a third of respondents, while in the long term they are among the most positive assessments of the Survey.

**Graph 2: Comparing the improvement or deterioration in the past three years and in the long term on socio-economic elements**



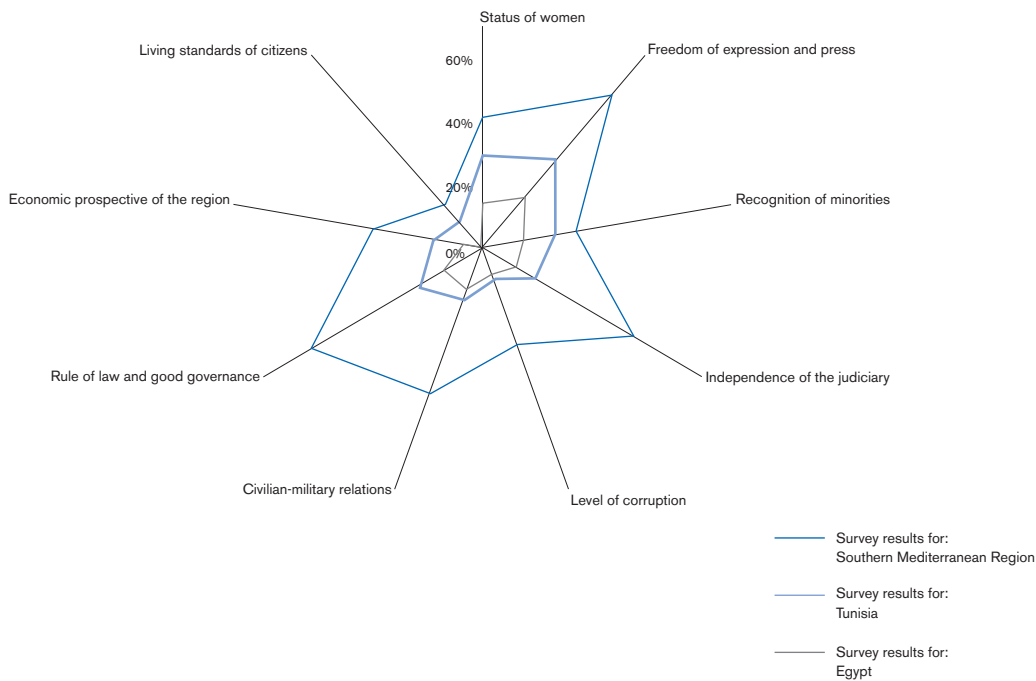
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Changes in individual countries

Analysing the assessment of the developments in each country separately, it is worth noting that in the case of Tunisia the changes that occurred in the past three years are evaluated rather positively. According to respondents, almost all the elements have improved, or at least they have not deteriorated. The elements judged to have improved the most after overthrowing the authoritarian regime in 2011 are freedom of expression and press, the rule of law and good governance and the independence of the judiciary.

In Egypt, which together with Tunisia was expected to undertake significant reforms, the developments in the recent three years are evaluated completely the opposite. Most respondents consider that all the fields have significantly worsened. When it comes to the forward-looking assessment, the optimism is also rather cautious.

**Graph 3: Assessing the improvement or deterioration in the past three years** (% of answers considering that the following elements have improved or highly improved)



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

Focusing the analysis on countries that have undertaken gradual political reforms, it is remarkable that Morocco and Jordan are assessed less negatively than the Survey average. However, in both cases, the level of corruption has deteriorated.

In Algeria, the perception of the country is better than the regional average, but 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, which has worsened compared to the rest of the countries analysed.

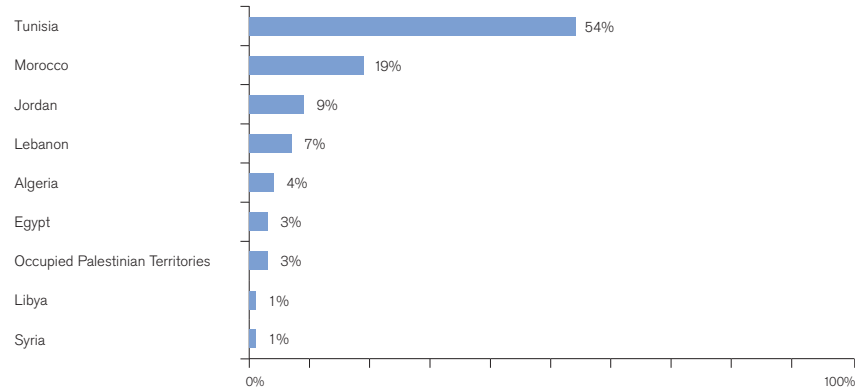
In general terms, the responses about Palestine follow similar patterns to the other countries in the region. Yet it is notable that rule of law and governance have more nuanced results: their deterioration is not so acute and it will not improve as much as in the average of countries.

In Libya and Syria, where revolts against the authoritarian rulers turned into sectarian conflict and war, the overall forward-looking assessment is clearly negative, in contrast to the opinion about other countries in the region.

### Prospects for democratic consolidation

The country with the strongest probability of consolidating a democratic regime is Tunisia, followed at a notable distance by Morocco. In the case of the latter, Europeans are much more optimistic than the respondents from the Mediterranean Partner Countries. Countries judged equally by all the respondents to have the lowest possibility for securing democracy are Libya and Syria.

**Graph 4: Order of countries according to their likelihood of having better prospects for the consolidation of a democratic regime**



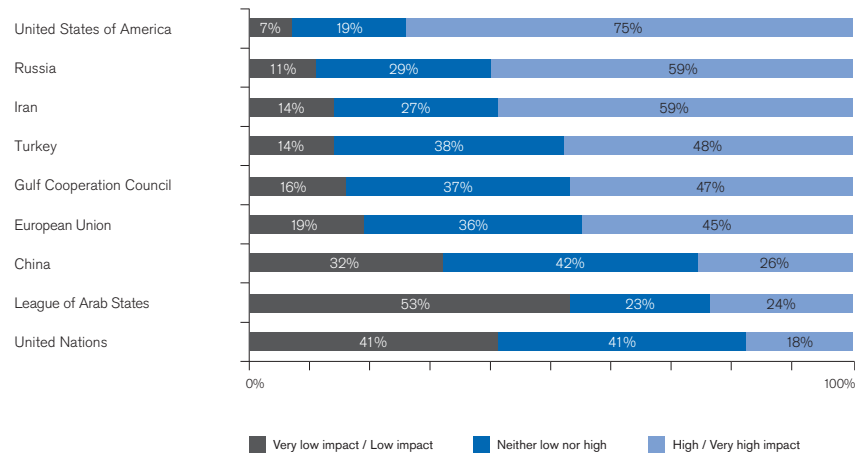
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

## Geopolitical Changes in the Euro-Mediterranean Region

### Impact of international players

In the classification of the impact of international actors in the region, the USA is ranked as having the biggest influence, followed by Russia and Iran. According to respondents, at present the level of impact of the EU and GCC in Southern Mediterranean countries is comparable. The actors whose impact has been judged the least significant are the League of Arab States and United Nations.

**Graph 5: Assessing the impact of the following international players in the Southern Mediterranean countries**

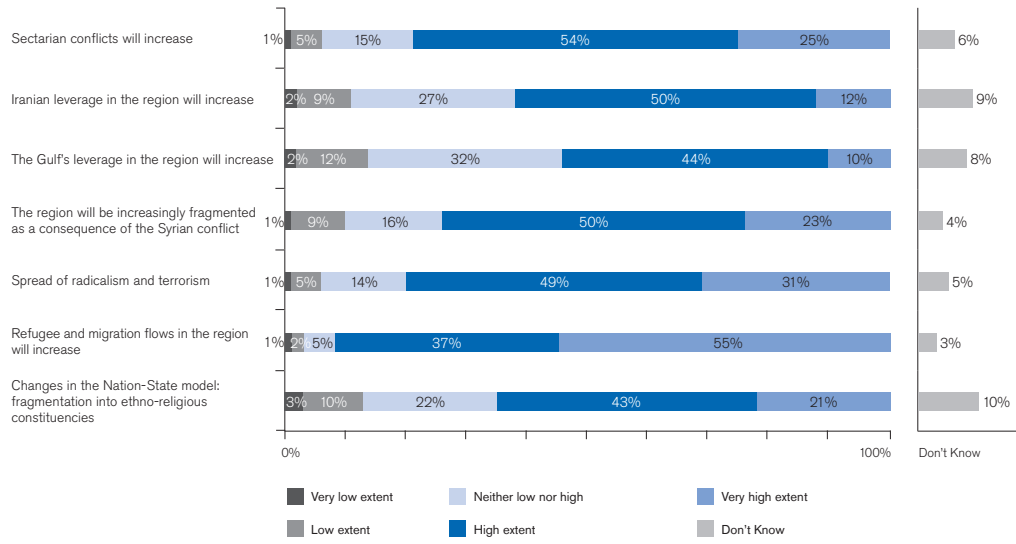


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Geopolitical impact of the Syrian conflict

When it comes to the Syrian conflict and its geopolitical consequences, most respondents consider that it will have a major effect on the increase of refugee and migration flows and spread of radicalism and terrorism. The Survey results also show that there is a considerable concern that the civil war in Syria will lead to the outbreak of sectarian violence and the fragmentation of the region.

Graph 6: Assessing the following scenarios affected by the Syrian conflict



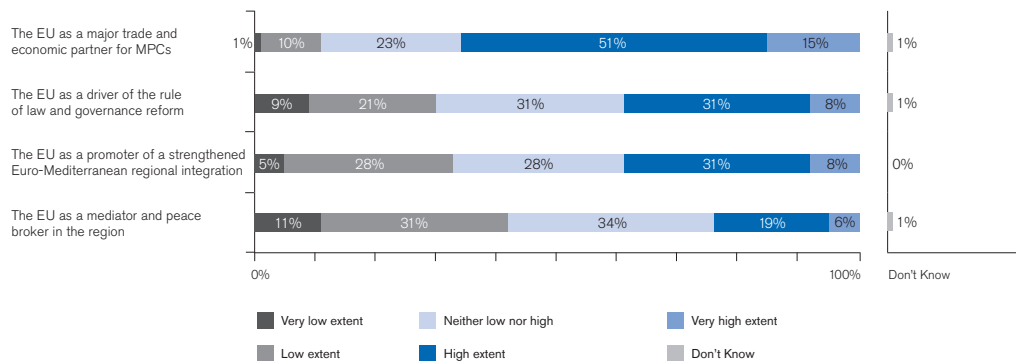
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

## Block 2: Position of the EU in the Southern Mediterranean region

### The EU's influence in the region

The EU's influence as a trading and economic partner is considered the most important. Its role as a driver of the rule of law and governance reform, as well as a promoter of a strengthened Euro-Mediterranean regional integration receives an equal, intermediate assessment. The influence of the EU as a peace broker is evaluated as low.

Graph 7: Influence of the European Union in the present framework of a multipolar scenario

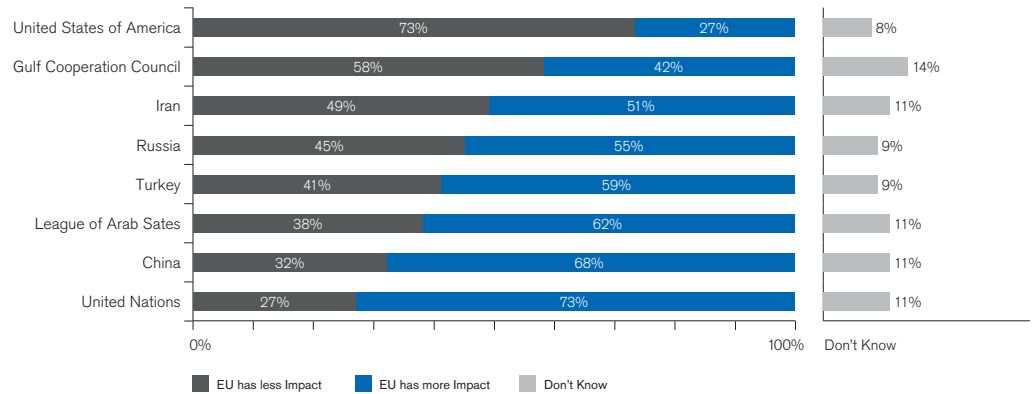


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### The EU's future role in the region compared to other actors

As far as the future role of regional and international actors in the region is concerned, only the USA and, to a lesser extent, the GCC are considered more influential than the EU. Respondents consider that the EU will have almost equal capacity to shape developments in the Southern Mediterranean as Iran and Russia, but much greater than other international organisations, such as the League of Arab States and the United Nations.

**Graph 8: Assessing the EU's future role in MPCs compared to other regional and international actors** (the graph below shows the EU's relative capacity to influence regional developments compared to other actors)



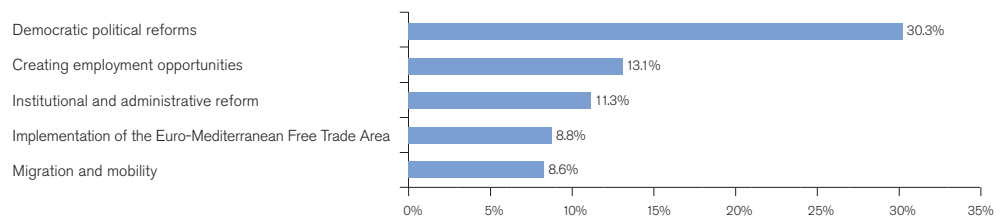
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

## Block 3: An assessment of Euro-Mediterranean Policies

### Future priorities of the EU's policies

Respondents indicate that promoting democratic and political reforms should be the first priority for the EU, followed at a considerable distance by the creation of employment opportunities. Institutional and administrative reform is ranked as a third priority. The last two priorities chosen out of eleven suggested areas are the implementation of the Euro-Mediterranean Free Trade Area and better management of migration and people's mobility.

**Graph 9: EU's policies in the near future for the region: selecting policy areas according to its priority** (5 areas considered to be 1st priority)



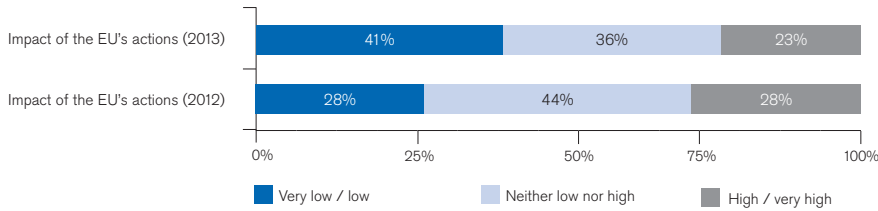
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Impact and visibility of the EU's actions in the Mediterranean

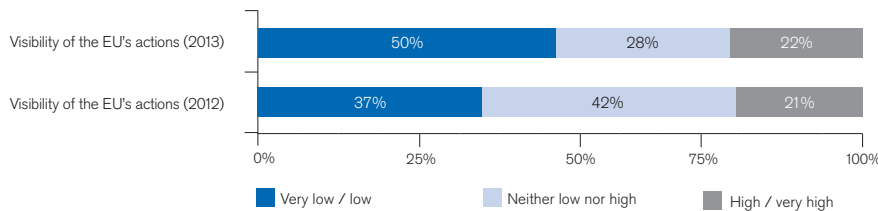
Almost half of the respondents assess the visibility of the EU's actions as low or very low, whereas the impact of the EU's actions receives a negative evaluation by 40% of respondents. Referring to the impact of EU actions in the region, the positive assessments have a slight downturn compared to 2012, while negative ones (low impact) increase by 13%. As for the

visibility of EU actions in the region, there is a slight upturn of 1% in the positive assessment, while the negative assessment (low impact) also increases by 13%.

**Graph 10: Assessing the visibility of the EU's actions in Mediterranean Partner Countries**  
(comparing 2012 and 2013 results)



**Assessing the visibility of the EU's actions in Mediterranean Partner Countries**  
(comparing 2012 and 2013 results)

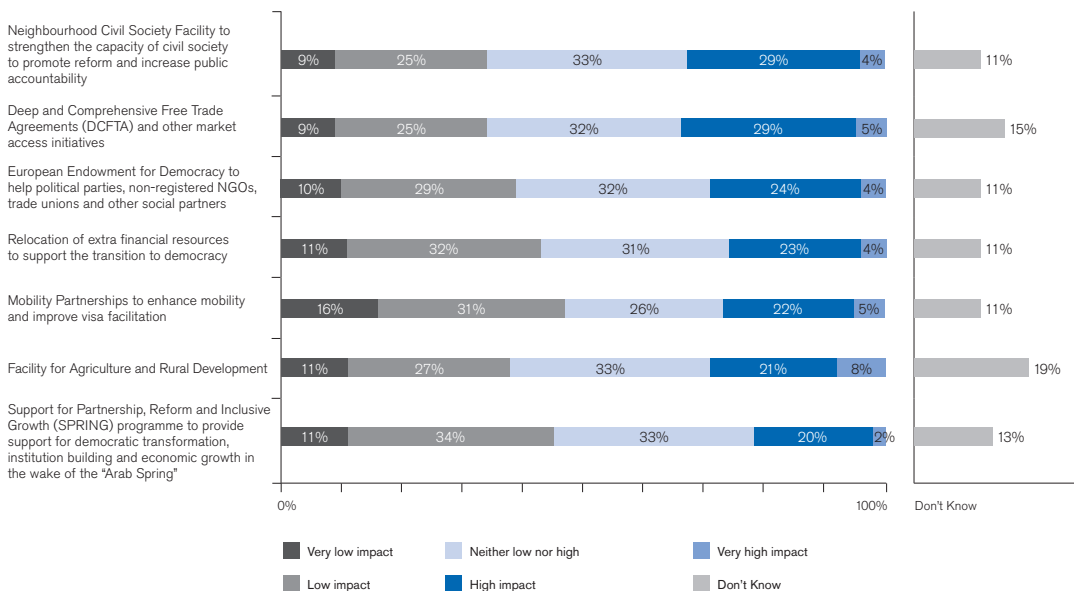


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### Impact of the ENP measures

ENP measures with the greatest influence are the Neighbourhood Civil Society Facility and Deep and Comprehensive Free Trade Areas, whereas the SPRING programme and Mobility Partnerships are assessed as having the least impact. Other initiatives designed to support democratic transformation, such as the European Endowment for Democracy and relocation of extra financial resources, do not receive a positive evaluation.

**Graph 11: Assessing the the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries**



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

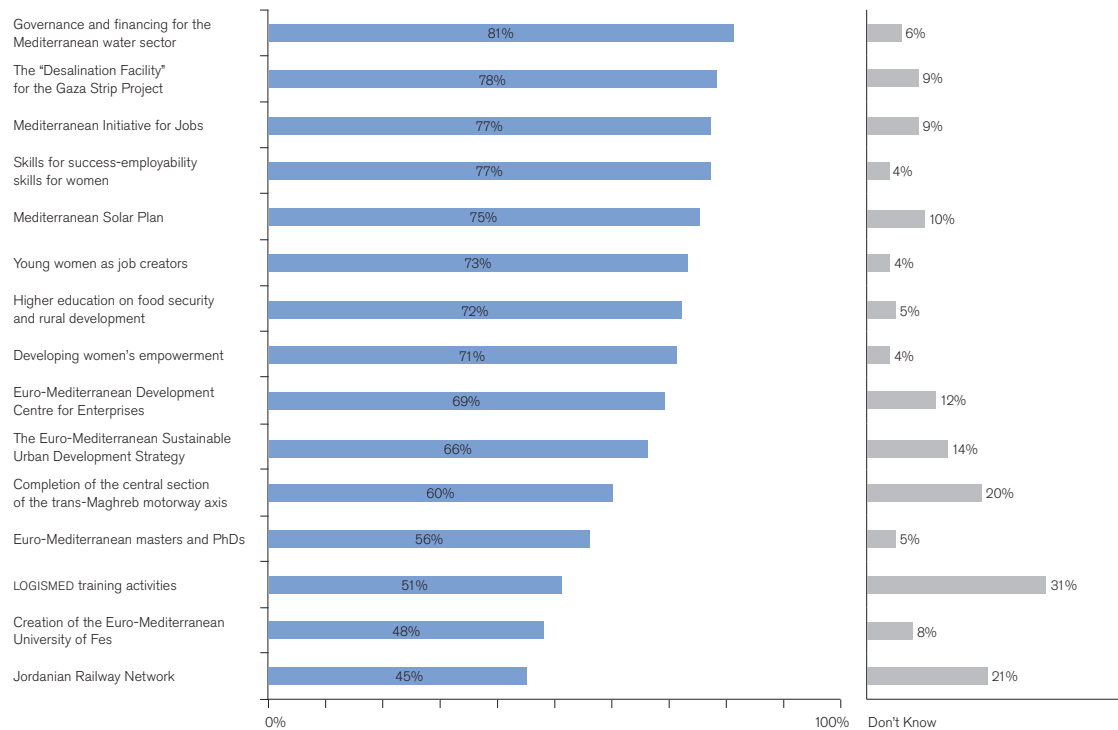
### Priority of the Union for the Mediterranean projects

Among the 15 UfM projects assessed, those judged to be of the highest priority focus on water, environment and energy issues, followed by projects designed to increase employability and to improve women’s empowerment.

There is a notable level of ignorance about UfM projects, in some cases reaching up to 30% of all responses. The best known projects are those related to education and promotion of gender equality and women’s entrepreneurial skills.

The responses from the EU and Mediterranean Partner Countries are in general quite comparable. However, respondents from the Southern Mediterranean region attach slightly greater value to infrastructure projects led by UfM, such as the railway network or trans-Maghreb motorways, while Europeans consider projects related to gender issues more important.

**Graph 12: Degree of priority attributed to the following projects of the Union for the Mediterranean**  
 (% of respondents answering Very high priority / High priority)



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



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# QUALITATIVE REPORTS

# A TRANSFORMED MEDITERRANEAN: NATIONAL AND REGIONAL LANDSCAPES

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## BARAH MIKAÏL

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**The initial belief in a possible wider extension for the Arab awakenings was quickly postponed.**

From the beginning, the Arab Spring brought hopes of witnessing considerable changes in the MENA region. The bravery with which Tunisians went out on the streets at the end of 2010 to express their frustration with their regime created a chain effect. The result was the fall of several regional leaders: Ben Ali in Tunisia, Mubarak in Egypt, Gaddafi in Libya and even Saleh in Yemen.

It is not surprising that the Arab Spring failed to produce further chain effects. MENA countries have their own particularities and their unique histories. This is why the initial belief in a possible wider extension for the Arab awakenings was quickly put on hold. Arabs are ready for change, but this does not mean that they want change at any cost.

The results of the IEMed Survey indicate that both citizens of the northern and the southern shores of the Mediterranean share a very cautious optimism when it comes to expecting significant changes in the MENA region. Generally, the same reaction can be seen in the 28 European states. This caution is justified by the troubling news and chaotic developments that people have witnessed in contemporary Arab history. However, some of the ongoing realities in the region warrant reasons for their moderate expectations. The majority of the interviewees agree that Maghreb countries do not necessarily have a bleak future, but Libya is there to remind them that threatening risks do also exist. In the Mashreq, motives for pessimism are much more serious, and the fears shared by most interviewees are justified by concrete examples. While Syria is in a disastrous situation, Egypt did not head towards the establishment of the “democratic process” that many people wished for. Moreover, the stagnation of the Israeli-Palestinian conflict also puts a limit on any positive expectation.

## Maghreb

**Compared to the Mashreq, the Maghreb is presenting better prospects.**

With the exception of Libya, the Maghreb is presenting good prospects compared to the Mashreq. In Tunisia, the cradle of the Arab uprisings, citizens have faced both socio-political and ideological tensions that led to a national polarisation. However, despite their disagreements, Tunisians shared similar concerns over the future of their country. The divide between Islamists and seculars is a reality, though it should not obscure another significant element: the socioeconomic rift and the division between developed touristic coastal areas and underdeveloped, more conservative, inner regions. Nevertheless, paradoxically, the Islamist party Ennahda had good electoral success in what was known as a secular country, thanks to its good organisation, the unpreparedness of the so-called secular parties and/or the fragmentation of the political scene. Tensions prevailed following the October 2011 legislative elections, and although there were some peaks of violence, they cannot be compared to the situation in nearby Egypt at that time. Most obviously, this is due to Tunisians' high level of education, their agreement on an implicit national pact, and the ability of the Ennahda party to come with proposals and decisions that continue in the spirit of a democratic system. Nothing indicates that Ennahda will necessarily lose the coming elections scheduled for the end of 2014.

Morocco has also been able to avoid serious risks and consequences. Contrary to most predictions, the Moroccan King has been quick to divert possible threats for popular protest, embodied by the 20 February movement. He was successful in establishing a constitutional committee to write a new Fundamental Law, but this is only part of the answer. Generally, Moroccans are well-known for their profound observation of two red lines not to be crossed: matters related to the Western Sahara conflict, and the King. Although critics of Mohammed VI do exist, they are eclipsed by the majority of the citizens. Fears of the security forces' repression may play a limited role. The existence of parliamentary elections in Morocco is, to a certain extent, an illusion; but Moroccans do not feel they have to fight against the situation. They favour stability.

Similarly, this quest for stability is part of the reasons why Algerians abstained from manifestations in the streets despite the catalytic social context. Algerians consider that they initiated their own Spring starting from 1988. Furthermore, they share a collective trauma dating back to the dark and violent Islamist-related years in the 1990s. Aside from this, the way NATO decided to participate in toppling Gaddafi's regime in Libya also dissuaded them from going to the streets: Algerians are proud of their country and of their history, and consider themselves the masters of their own fate. While they want change, they do not feel they need to be part of the global regional "trends". The day they decide to confront their regime will be the day when they feel that their own specific moment has arrived. Meanwhile, it is clear that Algeria also suffers some deficits in the potential and activities of its syndicates and civil society. Even youths willing to contest the Algerian regime lack coordination, making it easy for security forces to limit their demonstrations.

Last but not least, in Libya, popular demand for change is still present. However, with the lack of agreement on power-sharing and the absences of a well-defined roadmap towards a political landscape, the country is likely to remain hostage of its most powerful leaders. Libyans have not had the opportunity to experiment with strong institutions and representative leaders, and therefore the growing pains of reaching an institutional consensus and nation-building can be understood. However, the positioning of rival leaders along with the presence of weak institutions and lack of a national army complicate the prospects for serious engagement in a positive transition process. The pessimism over Libya's future is justified; the strong leader needed to provoke consensus and to guide the country towards a positive future has yet to appear. Conversely, this does not guarantee Libya's implosion in the long run. Rather, it implies that the population's aspiration to greater stability and positive prospects still lack strong and determined representation.

## The Mashreq

Events in the Mashreq generally lead to pessimism, though there are always exceptions. Obviously, none of the countries of the Mashreq can claim enduring stability, even Israel, where social tensions have been increasing in the last few years. However, while cautious optimism is permitted (to a very limited extent) in the case of Jordan, the rest of the region is clearly under heavy pressure.

In Egypt, none of the objectives for consolidation of democracy have yet been achieved. After the failed experience of the Muslim Brotherhood in power, the following coup d'état saw the establishment of the military at the head of the country (General Abdul Fattah al-Sisi) in the May 2014 presidential elections. The already limited prospects for separation of powers, independence of the judiciary, and respect for freedom of expression have entered an era of regression. Obviously, the huge economic problems that Egypt faces due to overpopulation,

**The quest for stability resulted in the abstention of most of Algerians and Moroccans from the street protests.**

**The prospect of Libyan transition is endangered by the rivalry between leaders, weak institutions and the lack of a national army.**

**Apart from the cautious optimism about Jordan, the rest of the Mashreq is under heavy pressure.**

### **Syria's crisis may have a spill-over effect on the situation in Lebanon and Iraq.**

corruption and poor democratic performances further complicate the search for efficient long-term solutions. Furthermore, President Sisi faces broad responsibilities given the fears of the population regarding the violent groups in the Sinai Peninsula, and the mounting need to address pressing livelihood issues, such as access to basic services. Nevertheless, Egyptians are likely to be disappointed if they expect too much, too soon, from their new president. The Gulf-originated effusion of Egypt's economy delays any serious solutions. Similarly, if people were to go back to the streets and criticise Sisi's rule, finding solutions in the foreseeable future would be considerably postponed.

Pessimism concerning Syria's future is justified by the stark realities. More than three years of war have destroyed the Syrian social tissue with more than 150,000 deaths, 2.5 million refugees and 6.5 million Internally Displaced Persons. Two or three Syrian generations have already been sacrificed and it will take the country many years to recover, regardless of what the political outcome is – Assad staying in power or his regime being toppled. However, a further issue with Syria's crisis is the spill-over effect. While political and religious tensions in Lebanon are on the rise, the affirmation of Jihadi and Salafi groups fighting in Syria fuelled the Islamic State in Iraq and al-Sham (ISIS)'s motivation to seize major towns in the western part of Iraq.

### **Prospects for peace between Israel and Palestine continue to stall.**

As for the Israeli-Palestinian conflict, prospects for peace continue to stall. After almost seven decades of an official state of war, Israelis and Palestinians are still lacking the conditions to solve their conflict. The situation becomes further complicated with the increasing fragmentation of Palestinian and Israeli positions. The times of the political dinosaurs (such as Arafat and Sharon) that had the power to make an unpopular decision and impose it on their people are behind us. The international community is increasingly reluctant to commit to any concrete steps that would allow the start of a new peace conference. In addition, the US is not pushing for courageous decisions that both Israelis and Palestinians need to take in order for them to achieve peace. This further impedes the hope for attainable peace for both. Nevertheless, the state of fragmentation prevailing on the ground lacks a straightforward solution. Even if Palestinians and Israelis agreed to move forward towards the creation of a Palestinian State or (unrealistically) a bi-national state, they would have to face strong internal (popular and political) opposition to either of these options. Unfortunately, the Israeli-Palestinian conflict will most probably continue to cause violence even on the day a solution is found, though this must not impede both Israeli and Palestinian leaders from agreeing on a courageous and historical dialogue in the future.

### **Overall assessment and future of the region**

#### **The rift between Sunnis and Shiites results from manipulations by states for political and strategic purposes.**

The future of the MENA region will not necessarily remain bleak. While the news of the seizing of several Iraqi towns by the Islamic State in Iraq and the Mashreq in early June 2014 was alarming, populations on the ground generally refrained from radicalising to jihadist and violent attitudes. Even the rift between Sunnis and Shiites is not a serious line of fracture between the two communities. It is rather the attitude of the states and governments and their manipulation of this historical disagreement for political and strategic purposes that leads to the impression of an inter-community apocalypse.

Although the MENA region will not stabilise any time soon, reasons for hope exist. Thanks to the Arab Spring, people have taken back their stolen dignity and found their voice, taking to the streets. However limited their impact was, elections in Tunisia, Libya and Egypt opened the eyes of the Arabs to the possibility they had of changing their own fate. Despite some appearances, for the era of dictators the beginning of the end is underway. Things may still move forward at their own slow pace, and periods of instability and violence will most probably prevail for some time. Nevertheless, the absence of any convincing example of a successful political transition does not mean that the Arab world will be heading backwards. It is already experiencing its transition.

However, the question remains: what will transition look like, and what will be the face of the MENA region in the coming 10 to 20 years? Most certainly, some communities will reorganise, while the internal boundaries of some countries (Iraq, Yemen, and Libya) will change. To some extent, this is the post-colonial order's last breath. The exact shape of the Arab world 2.0 remains unknown. But this uncertainty makes it even more important for actors external to the region to defend what is worth defending; for this they must contribute both positive and reasonable perspectives to the people to inform and nurture the transition process.

When Arabs went to the streets starting from 2010-2011, they argued for greater representation via a political system that would guarantee their basic rights. Putting an end to brutal state policies and choosing their leaders were part of their demands. However, they also appealed for access to employment and better economic opportunities. These demands remain.

Analysing the region through a geopolitical angle is relevant and unavoidable. However, people's basic aspirations and who is responsible for fulfilling them (that is, mostly current regional leaders and governments and their necessary adequate policies) must also be kept in mind. Otherwise, Arabs will continue to be disconnected from their national political leaders, and external players involved in the region will continue to be ignored. Geopolitical considerations bring negative predictions for the future of the region; however, human-related prospects put the objective less out of reach. When populations are reassured of their socioeconomic future, the rule of law is sure to follow. Regional stability will then be close at hand. However, it is imperative to save what can be saved now, starting with preserving the sense of national belonging, wherever this is still possible.

**Although the MENA region will not stabilise any time soon, the end of the era of dictators is underway.**

**Geopolitical considerations bring negative predictions for the future of the region; however, human related prospects are rather positive.**

# THE THREE PARADOXES OF THE ARAB SPRING

## ANIS SALEM

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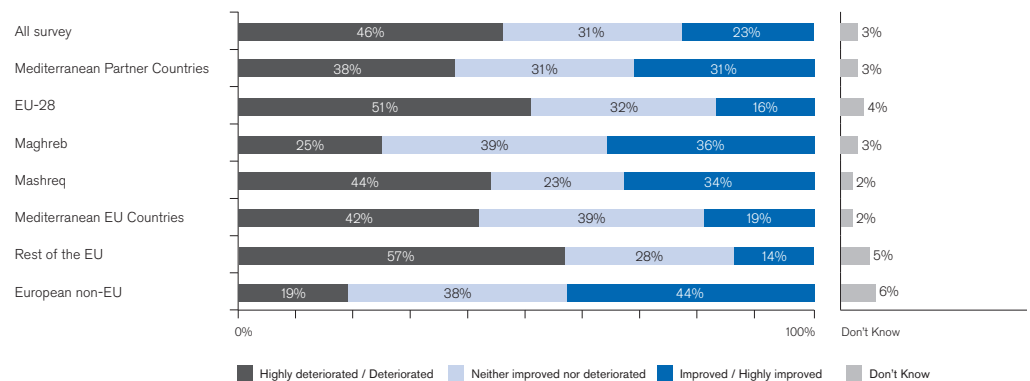
The Arab Spring brought with it much hope of progress on meeting popular demands for better standards of living, expanding democracy and freedoms, social justice and improving the status of women. The images of youth in the streets, the slogans that rallied people to the squares and the very active participation of huge masses of people were welcomed by much of the world as a sign of the end of “Arab exceptionalism” and the launch of another regional democratic wave that would join previous transitions in Europe, Latin America, and other parts of the world. Yet, the course of history chose to move in different, more complex, directions.

**Uncertain leadership of the uprisings was reflected in a political vacuum at the top, a lack of vision on the future and competition amongst new, inexperienced groups of activists.**

Uncertain leadership of the uprisings was reflected in a political vacuum at the top, a lack of vision on the future and competition amongst new, inexperienced groups of activists, and between them and other institutions (e.g. the army and security edifice, *ancien régime* remnants and political movements and parties, both of the rising Islamic variety and others with older secular colours). Meanwhile, the assault on regimes that had over-lived their shelf life necessarily weakened state structures and opened space for underlying forces with economic demands or suppressed identities (e.g. religious, tribal and ethnic groups in Libya, Syria and Yemen). As state fragmentation and insecurity increased, there were measurable economic costs (e.g. in 2011, the growth rate of Egypt’s economy slumped to just over 1% from its previous growth rate of 5% annually in the last years of Mubarak). In some cases, the rapid rise of Islamic parties, seemingly intent on reversing social progress, including legislation protecting women and children, frustrated activists promoting human rights. In a historical context, the 200 year arc of intermittent progress towards building quasi-secular models of government in the Arab world seemed to be turning decisively backwards towards Islamic and Khedivial precedents from earlier centuries. The ISIS declaration of an Islamic State in parts of Syria and Iraq in the summer of 2014 fits into this pattern.

This landscape reflects the *first paradox* of the Arab Spring: the hopes of a progressive wave of democratization have ended with nostalgia for stability and the powerful role of the state, a fear of the retrograde forces of political Islam, and concerns by women and minorities that their rights were more vulnerable in the chaos of change.

**Graph 1: Assessing the improvement or deterioration in the last three years of the RECOGNITION OF MINORITIES; respondents from:**

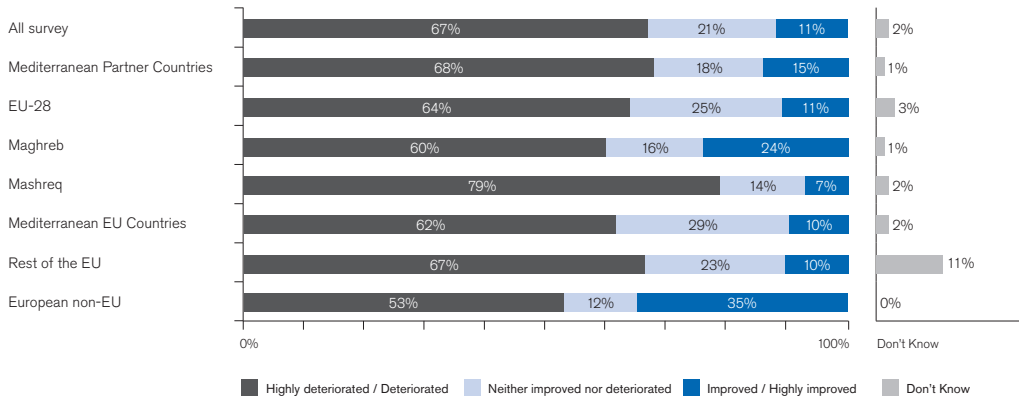


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

The *second paradox* is the resilience of structural factors that are not responsive to quick fix solutions, thus making governance even more difficult (witness the change of six Prime Ministers of Egypt over a period of three years or so). The challenges include the high percentage of youth, the high rates of unemployment, particularly amongst youth and women, the overall gender gap, the low literacy rates, the low allocations to vital services (health, education, social security), the addiction to government subsidies in addition to major population shifts to urban centers where slums bring a new political force to the streets.

**Second paradox: the resilience of structural factors that are not responsive to quick fix solutions, made governance even more difficult.**

**Graph 2: Assessing the improvement or deterioration in the last three years of the LIVING STANDARDS OF THE CITIZENS; respondents from:**

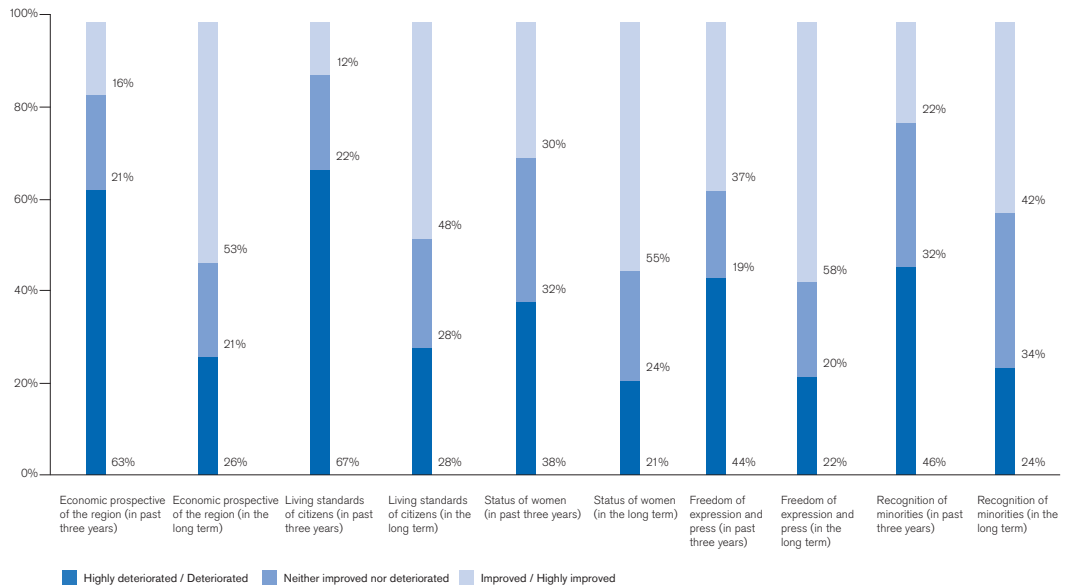


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

The *third paradox* is the sense of demoralization and despair clouding the mood of elites and the public in the region in contrast to the huge wave of optimism felt in 2011. Again this is based on perceptions of reality, including five, generally pessimistic trends in the Survey related to the socio-economic situation and future prospects.

**Third paradox: the sense of demoralization and despair in the region in contrast to the huge wave of optimism felt in 2011.**

**Graph 3: 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

**Future prospects**

**The Arab Spring has brought much hope for those seeking solutions for long standing societal problems in Arab countries.**

The Arab Spring has brought much hope for those seeking solutions for long standing societal problems in Arab countries. The mobilisation of various social groups, including youth, workers, slum dwellers and women established constituencies that demanded changes in legal and economic structures. Public space for protest, debate and political participation has expanded in most cases. But retrograde forces have also been unleashed, whether they be those seeking to destroy the old assumptions related to the role of the state, cohesion and citizenship (Syria, Iraq, Libya and Yemen provide stark examples), or those seeking to use the state to realise their dream of transformation to an Islamic State (as was the Moslem Brotherhood aspiration for Egypt), or indeed those forces representing the “return of the state” (the military-security structures, the media, big business, liberals scared of Islamic parties, etc.) as if nothing changed.

**The overall setbacks experienced by the Arab Spring, should not overshadow the positivism radiating from North Africa.**

The overall setbacks experienced by the Arab Spring, and the resultant sense of pessimism, should not overshadow the positivism radiating from North Africa, perhaps because of a more successful transition underway in Tunisia, or the wise pre-emptive reformist steps taken by Morocco, or the confidence based on the oil revenues of Algeria. It will be interesting to follow the economic course of these countries to see if this sense of confidence will reflect in higher economic and social achievements or if the structural challenges facing the region will prevail. More generally, for the region as a whole, future challenges will include developing democratic and stable democracies, dealing with security threats that threaten fragmentation and improving the economic situation to meet the demands of the high percentage of youth populations. Some longer term views retain the hope that change will come at the hands of new leaders emerging from the youth who participated in the Arab Spring. Only time will tell if this optimism rests on solid ground.

# EUROMED SURVEY: GOVERNANCE ISSUES

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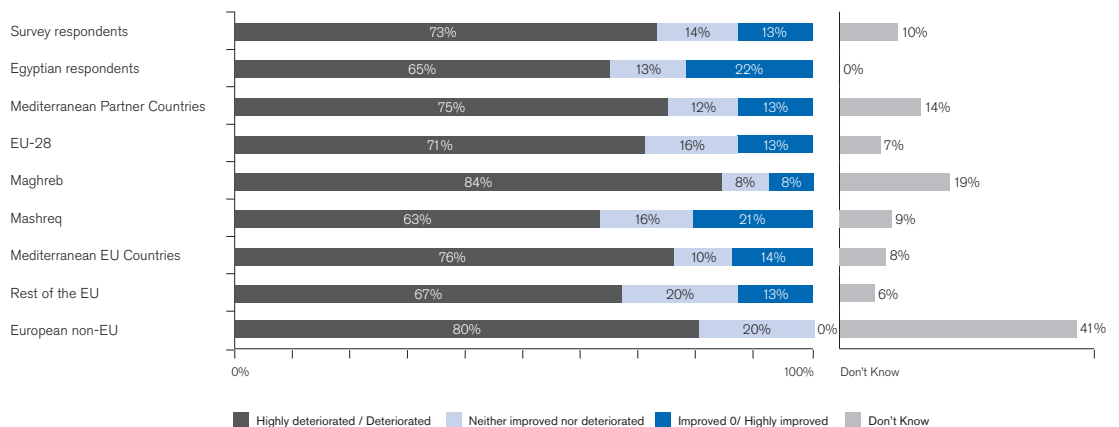
**Since the Arab Spring, almost no progress has been made on matters such as rule of law, independence of the judiciary and corruption.**

**The rule of law has suffered two setbacks: the judiciary has been politicised and is unable to translate its rulings into action due to a lack of internal security forces.**

While governance issues stood at the centre of the Arab Spring, the years since the toppling of governments in Tunisia, Libya and Egypt have technically not brought much progress on matters such as rule of law, independence of the judiciary, corruption and the like. The fact that the Survey shows comparatively optimistic results might be due to the fact that it is concerned with a long-term prognosis (a time frame usually defined as more than 25 years) rather than a short-term one. Cautious optimism is perhaps the best description of this outcome, which stands in contrast to developments on the ground.

In general, governance issues across the board have deteriorated in the years since the Arab Spring. The rule of law for instance (see graph 1) has suffered setbacks on two accounts: on the one hand, the judiciary has been politicised in countries; on the other, it is unable to translate its rulings into action due to a lack of internal security forces. In Egypt, for instance, the previously comparatively independent judiciary has become part of the current antagonism between the Muslim Brotherhood and the government. This followed a strained relationship during President Morsi's reign, including the dissolution of the 2011 parliament on technical grounds and Morsi's decree that placed his own decisions above legal review. Now, after a new constitution which brings in greater autonomy, the judiciary is handing down harsh rulings in mass trials on civilian demonstrators, and comparatively lenient ones on police officers involved in the 2013 clashes.

**Graph 1: Assessing the improvement or deterioration in the last three years of the rule of law and good governance in Egypt**



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

Not a single officer has been convicted regarding the killings that occurred during the 2011 or indeed the 2012 protests; although a ministry for transitional justice was created in 2013, its agenda or goal is unclear. Things do not look better in Libya, where the judiciary has become a target of assassinations and intimidations in the absence of a functioning police. Prisons are under the control of militias, whereas the Political Isolation Law seeks an extensive purging of the judiciary. Things look slightly better in Tunisia, where the new constitution seeks to redefine the previously highly politicised judiciary.

**Civilian-military relations continue to be challenged throughout North Africa.**

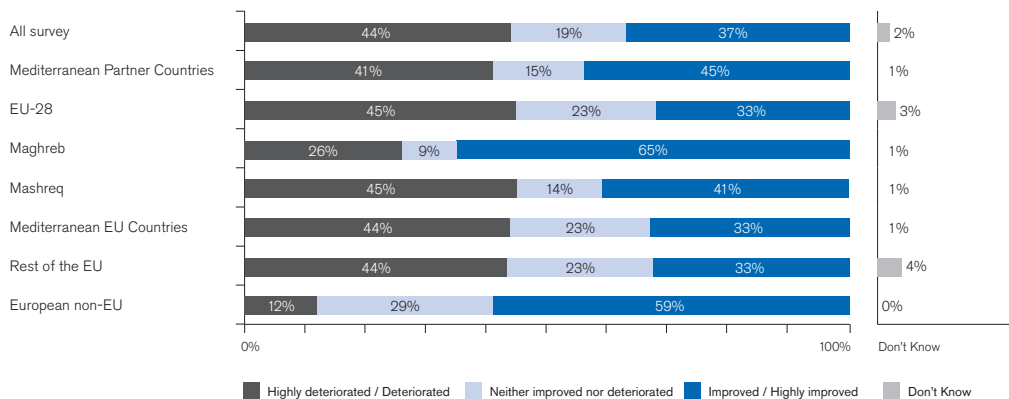
Civilian-military relations are equally challenged throughout North Africa. The return of the Egyptian armed forces to the political arena began with the ousting of President Morsi in summer 2013 and ended in the election of Abdul Fattah al-Sisi, its previous commander, as president. In the new constitution, the armed forces enjoy even more independence from civilian control than before, although marginal restrictions have been applied to the possibility of trying civilians in military courts. In Libya, the implosion of security has been flanked by the partial siding of the armed forces with retired general Khalifa Haftar, and a loss of control over internal as well as external security forces. In Algeria, the reshuffling of several security portfolios indicates an enhanced grip over the security services that are struggling with terrorism in the country's South, but full civilian control is still to be established.

**Freedom of expression and press has suffered a back-and-forth development without a clear end in sight.**

Although freedom of expression and press has improved since the pre-Arab Spring years, it has been a back-and-forth development without a clear end in sight (see graph 2). The Press Freedom Index has particularly deteriorated in Egypt compared to 2010, in spite of a brief opening in 2011. The detention of journalists on terrorism charges, intimidation of journalists and an overly biased media landscape resulted in the 2013 classification of "Not Free" by Freedom House. The legal context for the media has not changed in the constitutions of 2012 or 2014. Things are slightly more positive in Tunisia, where the new constitution enshrines freedom of the press, and even Libya, although in the latter case journalists are now being targeted in a worsening security situation.

**Economic prospects are still dim throughout the region.**

**Graph 2: Assessing the improvement or deterioration in the last three years of freedom of expression and press; respondents from:**



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

**In spite of some worrying trends in terms of governance issues, there are grounds for cautious optimism about the future.**

Lastly, economic prospects are still dim throughout the region. Urgent reforms relative to subsidies and investment have been postponed by internal upheaval; and deterioration in security throughout the region has worsened the climate for business activities altogether. The main drivers leading up to the unrest of 2011 – unemployment, poverty and corruption – have not been tackled and continue to deteriorate across the region.

Three years into its transition, the Mediterranean region is facing a series of governance issues head on. Positive developments continue to be counterbalanced by worsening security conditions and polarising politicisation of state institutions. In spite of these sometimes worrying trends, the experiences of 2011 and the perceived opening of the political sphere cannot be turned back, and certainly explain the continued yet cautious optimism when it comes to long-term development.

# SYRIA OR THE INEVITABILITY OF FEELING CONCERNED

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**When the Survey was conducted, there where hopes on politics and diplomacy efforts to reach some sort of agreement for Syria. Some months later, the evolution of events on the ground brings a gloomy perspective to the future of the region.**

**The drama of refugees is overwhelming, sectarianism is reaching unexpected levels and terrorism has spread to an unexpected rhythm and strength.**

Predictions were bound to become certainties. And so it tragically occurred with the answers given to this 2014 Euromed Survey's questions concerning Syria. At the beginning of 2014, when the Survey was conducted, one could still maintain some hope in politics and diplomacy efforts reaching some sort of agreement for Syria built upon the "Geneva Communiqué". Some months later, the evolution of events on the ground brings a gloomy perspective to the future of the region.

As was suggested, the drama of refugees is overwhelming, both for local population, neighbouring countries and humanitarian organizations, and there is no sight of improvement in the near future. Secondly, sectarianism as a product of sectarian politics promoted by certain governments, such as Bashar Al Assad's and Nouri Al Maliki's, is reaching unexpected levels, dooming societies and communities to fracture and confrontation. Furthermore, terrorism has spread to an unexpected rhythm and strength that directly threatened the government in Baghdad and the territories held by Syrian rebels in the North. The proclamation of a caliphate on the Iraqi and Syrian territories by Abu Bakr Al Baghdadi, leader of the terrorist organization Islamic State of Iraq and Syria (ISIS), now turned into an explicit "Islamic State", triggered all the alarms in both regional and international security agencies. The organization's appeal to foreign fighters, its funds, arms provision and organizational and combat skills, have made it an unbearable challenge to the stability of the region and a real threat for the international community. Radicalization is on the rise, and the old borders of the region seem challenged today not so much by Kurdish claims or confessional cleavages, but by a radical militant and violent project based on fear, totalitarianism, murder and brute force. The Islamic State feeds itself from the cruelties of war, raising militarization, sectarianism, marginalization, human drama, conflict... And it draws international attention and jihadi recognition claiming that its caliphate is bound to erase the borders designed by the Sykes-Picot Agreement, reviving the echoes of colonialism for its own benefit.

Concerning regional actors, the old rivalry between Saudis and Iranians (both played their perverse roles, as other Gulf countries such as Qatar did, in supporting either the Syrian regime or some components of the Syrian rebel opposition) has encouraged sectarianism in their respective spheres of influence, as they also gained regional leverage. Gulf countries have opened a new phase of involvement entering into a coalition with the US to fight against the threat of expanding terrorism in the region, which they deem too close and too risky for their own domestic security. Iranian fighters joined the troops to counter the advancement of Islamic State in Iraq, and Iranian leaders backed – somehow following the efforts of the US and Saudi Arabia – the replacement of Maliki by Haider al Abadi, in an attempt to de-escalate Iraq's sectarian conflict.

On the contrary, Iran's involvement in international initiatives to appease Iraqi politics have not been emulated within the Syrian context, although it is difficult to envisage a successful political settlement without drawing to the negotiating table key players in regional politics, such as Russia and Iran. All in all, the dynamics and trends outlined by respondents in this year's Survey have been more than confirmed, unfortunately surpassed.

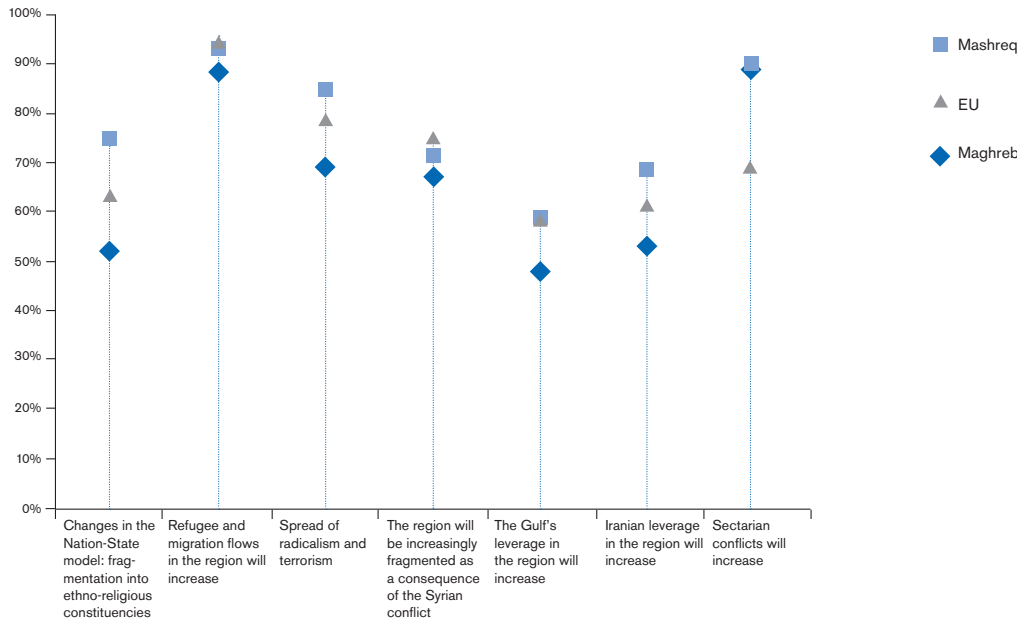
Nevertheless, it is interesting to explore the answers in depth, as they provide interesting insights into how perceptions are constructed according to different variables in place. At first glance, one of the most outstanding remarks that can be made is that respondents from the Maghreb region show less awareness of the consequences of the Syrian conflict among respondents from the Maghreb region than those from Mashreq countries. The latter have a natural tendency to envisage a more severe deterioration of the situation in the region due to their geographical proximity to the conflict.

According to almost all respondents (92%), the Syrian conflict predictably has a huge impact on migration and refugee flows throughout the region (see graph 1). As a direct consequence of the deterioration of living conditions in the country, the displacement of population has been constantly increasing in 2013, reaching critical thresholds in terms of hosting capacity in neighbouring countries. In July 2014, around 2.9 million refugees were registered by UNHCR, 1.4 million in Lebanon (where population does not even reach 5 million people), 808,000 in Turkey and 607,000 in Jordan. In fact, the evolution of the refugee issue is a major concern for Mashreq countries.

**Respondents from the Maghreb region show less awareness of the consequences of the Syrian conflict than those from Mashreq countries.**

**The evolution of the refugee issue is a major concern for Mashreq countries, due to their geographical proximity to the Syrian conflict.**

**Graph 1: 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

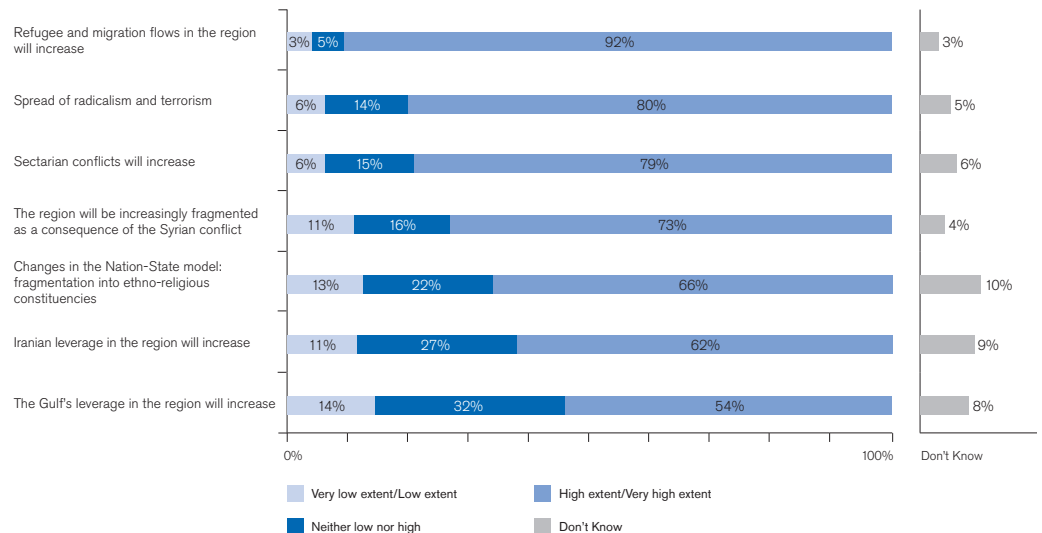
In addition to this, there were more than 6 million IDPs (internally displaced people) within the Syrian borders. The movement of people is not decreasing, as UNHCR recently reminded us: more than 100,000 new refugees were registered every month during the first semester of 2014. Furthermore, the current jihadi offensive in Syria and Iraq has provoked an increase in migration flows, due to the increase in combats and repression from jihadi fighters. Although figures are alarming, they do not account for the real complexity and human drama behind them, since they abound on an already existing issue of refugees provoked by previous conflicts. Thousands of Palestinians and Iraqis in Syria are now suffering an extreme condition of double refugees. The issue is so alarming that UNHCR announced on 20 June that the world number of refugees is the highest ever since the Second World War. Undoubtedly, the Middle East, with the Syrian crisis as its epicentre, is clearly showing this tendency.

Aside from Mashreq respondents, a considerably high portion of participants from Mediterranean Europe and from the EU-28 consider that the number of refugees will increase due to a protracted conflict. For the former the reason is obvious, whereas for Europeans the answer reflects a certain focus on the debates around migration issues: thousands of Syrians are waiting at the doors of Europe (in Morocco or in the Balkans) and 82,000 asylum seekers filled their requests before the EU between 2011 and 2013.

**Porosity of Syrian and Iraqi frontiers and the military offensives of jihadi groups explain why most respondents consider the Syrian conflict as a catalyser of terrorism and radicalisation.**

Concerning terrorism and radicalisation in the region, 80% of participants consider the Syrian conflict as a catalyser of terrorism and radicalisation, particularly those from Mashreq countries. The porosity of Syrian and Iraqi frontiers and the military offensives of jihadi groups explain this result and the general perception of threat. Although al-Qaeda and its franchises seemed doomed after the success of Arab Revolutions and the winds of change in the region, the insecurity, lack of stability, weakness of political powers and influx of weapons in the region caused by armed confrontations in Libya and Syria, for example, fed the seeds of jihadi terrorist groups that were capable of emerging in the most vulnerable scenarios. But despite the widespread threat, Maghreb respondents turn out to be more optimistic concerning the increase of terrorism, a perception which might change in the future if local jihadi branches increase their activity.

**Graph 2: 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

Another interesting issue raised by the Survey is the implosion of the Nation-State model in place and ethnic and religious fragmentation. The progressive and different scale of self-rule of Iraqi and Syrian Kurdistan, protected by the *peshmergas*, announce the de facto end of state sovereignty in the region. Furthermore, the later creation of a transnational “caliphate” comprising Syrian and Iraqi territories by the Islamic State (former ISIS) reinforces the fear of a deconstruction of modern states showing not only certain institutional weakness but also a major structural deficit. In this context, it is interesting to observe that the group of respondents more fearful of such a scenario are participants from non-EU countries, such as Serbia, Montenegro or Bosnia and Herzegovina. Their leaning towards “Balkanisation” in the Middle East and their stance concerning ethnic and religious conflicts may well serve as an explanation for these results.

A large majority of respondents identify the threat in increased sectarian violence. For 73% of them the risk of inter-confessional conflicts provoked by the stalemate in the Syrian conflict is a real threat. After the Arab revolts in 2011, born from peaceful and civic movements, exploitation of identity politics has been on the rise, in Bahrain or Yemen, but also in Syria. In recent years, we have also witnessed a certain revival of tensions between both candidates to regional leadership, the Saudi Wahhabi Kingdom, on the one hand, and the Islamic Shiite Republic of Iran, on the other. This cleavage between Shiites and Sunnis provokes the revival of the spectre of civil war in Iraq but also in Lebanon, where stability is granted by a highly precarious confessional political system.

In this context, 62% of respondents consider that Iran, key player in the conflict, has an opportunity to expand its influence. Iranians have been militarily engaged on the side of Bashar al-Assad since the end of 2012, and sent advisors and instructors from the *pasdaran*. However, the perception concerning Gulf monarchies is quite different. Barely 54% of respondents grant such centrality to the role played by Gulf actors, despite the fact that they sent donations and weapons to support the Syrian rebels but have not succeeded in swinging the victory towards the rebels. Furthermore, Saudis who intend to lead the Sunni sphere are confronted with different interests than those of Qataris. Based on the results, it might be considered that despite common threats and interests, such as combating jihadi fighters in the region, both regional powers, Saudis and Iranians, continue to deploy an aggressive rhetoric in which it is difficult to decide who is leading the race.

In conclusion, the centrality of the Syrian conflict in Middle East policy-making is indisputable. Respondents of the Survey were well aware of this and their answers reflect how obvious it was that the situation could only deteriorate in the following months. When addressing the Syrian conflict the dices were loaded, and informed citizens knew already that political stalemate and diplomatic inaction could only bring more instability to the region.

It was difficult to foresee how the refugee crisis could worsen, but it did with the jihadi offensive and now with the US-led coalition air strikes. Sectarianism has exploded in Iraq and Syria, it is seriously threatening the fragile equilibrium of Lebanon, Bahrain and others, and it has its reverberation in countries where it had never been such an issue, like Egypt. Iran is there, for better and the worse, for the nuclear dossier negotiations, for Iraq and it should also be there for Syria’s future, despite reluctance from Americans, Saudis or Israelis. Radicalization is a concern for both Arab and non-Arab countries, faced with confronting a menace that might grow either inside or outside their own borders. They are working to reinforce security and intelligence mechanisms to control foreign fighters, extremely radicalized, violent and militarily trained. They pose a threat not only for the territories where they go to fight but also for their countries of origin where they come back afterwards. In the regional arena, despite their democratic deficits and their perverse role in the Syrian conflict, Gulf countries are growing in influence and becoming inevitable players in dealing with politics in the region. The issue is to what extent Gulf countries and Iran are being “Mediterraneanized” or Mediterranean countries are being “Gulfized”. We will have to wait for future Euromed Surveys to see.

**The creation of a transnational “caliphate” by the Islamic State reinforces the fear of deconstruction of modern states.**

**Most respondents consider that the Syrian conflict will contribute to the growth of sectarian violence, because of the rise in exploitation of identity politics and tensions between Saudi Arabia and Iran.**

# A MULTIPOLAR SOUTHERN MEDITERRANEAN: THE EU IN SEARCH OF A ROLE

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## The changing politics of North Africa and the Middle East

**The growing heterogeneity of the EU “southern neighbourhood” since the Arab revolutions of 2011 is becoming an acquired notion.**

The growing heterogeneity of those parts of the world which the EU calls its “southern neighbourhood” has become an acquired notion since the 2011 Arab revolutions. This does not mean that the North African and Middle Eastern states were homogeneous prior to 2011, given their diversity, their conflicts, unequal socioeconomic development and distribution of resources and inability to cooperate with each other as a region.

Yet the domino-effect turmoil brought about since the fall of the Ben Ali regime in Tunisia has intensified the diverse challenges across this region of the world. While some countries, through revolution (Tunisia) or elements of reform (Morocco and Jordan), have embarked on consolidating more or less pluralist governments seeking closer relations with the EU, states have collapsed into civil and regional war (Syria), with such serious implications for neighbouring countries (Lebanon) that the conflict has become a region-wide one. Libya too appears on the brink of a civil war along tribal rather than sectarian lines. The hopes for Egypt’s Spring were dashed first by President Mohammed Morsi’s non-democratic style of government and then by the military coup which ushered in the new regime of President Abdul Fattah al-Sisi, accompanied by a widespread and violent repression of the opposition. Palestinian-Israeli relations, despite renewed efforts from the US and the EU, do not seem to be heading towards a solution to the longest standing conflict of the area.

**An “arc of instability” is making the MENA region vulnerable to incursions that are undermining its own internal stability.**

The Southern Mediterranean itself is challenged by exogenous pressures perhaps unprecedented in scale. The war in Syria and in Libya in 2011 and instability in Mali and the Horn of Africa have made the regions south of North Africa an attractive space for al-Qaeda infiltrations and various jihadist groups. From Mali all the way to Afghanistan and Iraq, a so-called “arc of instability” is making North Africa and the Middle East vulnerable to incursions undermining its own internal stability. The region has become more important as a route for transiting refugees from Sub-Saharan Africa (with recent latent conflicts in South Sudan, Central African Republic, Democratic Republic of Congo) and from Syria and Afghanistan, as well as a destination for immigration. In short, alongside the internal demographic and socio-economic fragilities and internal political discontent which the Arab revolutions and movements in the region brought to the fore, these states are also vulnerable to unprecedented external challenges which are making the international relations of these governments more global and less singularly focused on Europe.<sup>1</sup>

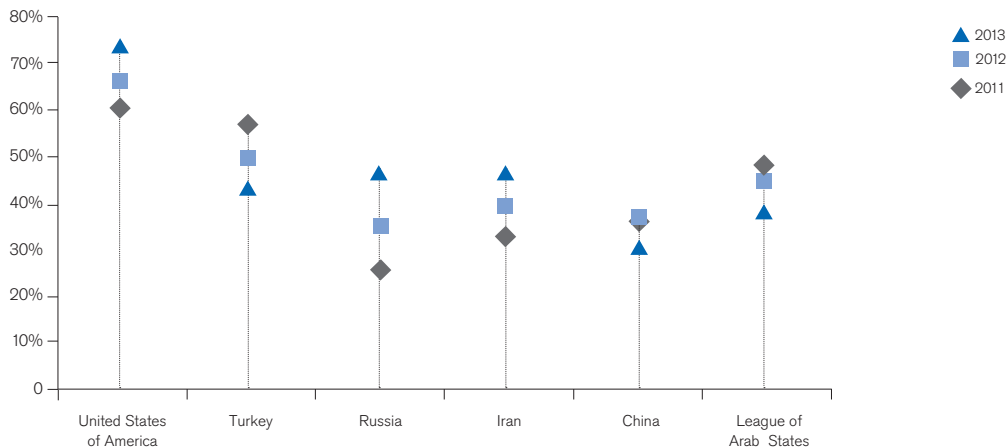
1. For a synthetic picture of the situation in the region, see G. Grevi, D. Keohane, B. Lee and P. Lewis, *Empowering Europe’s Future: Governance, Power and Options for the EU in a Changing World*, Annex 1 on “The Strategic Neighbourhood”, Chatham House, ES-PAS and FRIDE, 2013. For an analysis of population movement patterns, see International Centre for Migration Policy Development, MTM i-Map Project (Interactive Map on Migration in Africa, the Middle East, and the Mediterranean Region) by P. Fargues (ed.), *EU Neighbourhood Migration Report 2013*, Florence, Robert Schuman Centre for Advanced Studies, Migration Policy Centre, European University Institute. Presentation by Egypt FM, Egmont Institute, Brussels, 1 April 2014.

This multipolar focus of the MENA states is mirrored in the growing role of other actors. In recent years, the Gulf States and Turkey have made efforts to play a bigger political role in North Africa and the Middle East, alongside economic and financial involvement. Migration patterns have changed showing that Middle Eastern citizens are increasingly moving to the Gulf in search of work opportunities. China has stepped up its presence in the region alongside other Asian players. As the graph 1 shows, the present Survey and past ones indicate how the role of other regional and non-regional actors has become perceived as growing in recent years, even if the US continues to be seen as the primary external actor shaping regional politics, making up a far more multi-polar region.

**The unprecedented external challenges facing MENA countries make their international relations more global.**

**Graph 1: Assessing the EU's future role in MPCs compared to other regional and international actors.**

**Comparing 2011 and 2013 survey results.** (The graph below displays the answers assessing the actor's capacity to have more influence on regional developments than the EU.)



Source: Compiled by the IEMed based on the results of the 3rd, 4th and 5th Euromed Survey

## EU responses and the challenges of engagement

The EU's response to the Arab Spring came soon after the events in Tunis, Cairo and Tripoli. In March, the EU published its "Partnership" and in May the scheduled ENP Review included upgraded policies reflecting the Partnership proposals.<sup>2</sup> Essentially, these entailed sharpening the existing tools underpinning engagement across the Mediterranean: enhancing trade and aspects of economic integration, making aid more tailor-made to conditions, and identifying new forms of cooperation on migratory patterns. The EU summed these efforts up into the "3 Ms" (more market access, more money, more mobility), seen as incentives available to those countries willing to get closer to the EU and embark on political reforms to reflect the demands for pluralism and good governance coming from the uprisings. The EU thus refined the way it exercises its conditionality, aimed at adopting a more "differentiated" approach to better target specific countries, in an effort to give more meaning to the notion of "partnership".

**As a response to the Arab Spring, the EU refined the way it uses conditionality, adopting a more "differentiated" approach.**

2. European Commission and the High Representative of the Union for Foreign Affairs and Security Policy, "A Partnership for Democracy and Shared Prosperity with the Southern Mediterranean", COM(2011) 200 final, Brussels, 8 March 2011a; European Commission and High Representative of the European Union for Foreign Affairs and Security Policy, "A New Response to a Changing Neighbourhood. A Review of the European Neighbourhood Policy", COM(2011) 303, Brussels, 25 May 2011b.

**Despite admitting the need to engage in dialogue with a wider variety of partners, the EU's action remains limited and of uncertain consequences.**

In parallel to this approach, which essentially revised the ENP without changing its content,<sup>3</sup> the EU also started to use a broader range of tools to engage in the region's democratic processes as well as in its security. Since 2011, it has sent six Election Observation Missions (EOM) to the region to support free and fair electoral processes and/or to support capacity-building in the electoral field. The EU contributed to the creation of the European Endowment for Democracy (EED), an EU Member State and Commission-funded non-governmental organisation conceived to provide financial support to political actors working for democracy in the EU's neighbourhood. It has stepped up assistance to civil society actors and NGOs with the aim of focusing on local capacity-building.

If these tools potentially could respond to the need to support the positive trends of people's empowerment and self expression which have exploded over the past few years, other tools are conversely aimed at playing a role in containing the security risks emanating from the region. In the spring of 2011 France and Britain were the two leading EU Member States at the head of a NATO military operation in Libya. The Common Security and Defence Policy (CSDP) was also used to deploy missions in Libya (a border control mission – EUBAM). Further south, following another military intervention led by France in Mali, since 2011 the EU has deployed CSDP missions in Mali, Niger, Somalia, and the Central African Republic. In addition, the EU approved two strategies – for the Sahel and for the Horn of Africa –, appointed EU Special Representatives for the Mediterranean (since the spring of 2014 Special Envoy for Libya) and the Horn of Africa, and adopted a “comprehensive approach” towards Syria.<sup>4</sup>

The EU also tried to devise approaches which reflected the growing relevance of forms of multilateralism as a means of dealing with the multipolarity of the region. The special task forces organised with Tunisia (November 2011), Jordan (February 2012) and Egypt (November 2012) were efforts to mobilise EU financial and economic support, international organisations, the private sector and other donors and investors to address the deep economic crises in the countries, but it achieved limited results in reaching out towards non-European donors and businesses.

The EU's position on the Syrian crisis consistently underlined the need for dialogue with the other regional actors – Turkey, the Gulf States – as well as the UN Security Council members. But it kept the non-proliferation talks with Iran separate from discussions over Syria. The breakthrough with Iran may vindicate this position, and there is no reason to believe that engaging Iran over the Syrian crisis would have produced better outcomes in the war. For the purpose of this analysis, the observation is that whatever discussions were carried out with regional partners over Syria, the EU does not seem to have made any particular inroads in its broader cooperation with the Gulf countries, Turkey or Iran over North Africa and the Middle East. Despite the acknowledgement of the multipolarity of the region and the need to engage in dialogue with a wider variety of partners, the EU's track record remains limited to a few initiatives of uncertain consequence.

3. For a critique, see R. Balfour, in S. Biscop, R. Balfour and M. Emerson, *An Arab Springboard for EU Foreign Policy?*, Brussels, Egmont Institute, 2012.

4. European Union External Action Service, “Strategy for Security and Development in the Sahel”, no document number or date, 2011, available at: [http://eeas.europa.eu/africa/docs/sahel\\_strategy\\_en.pdf](http://eeas.europa.eu/africa/docs/sahel_strategy_en.pdf); Council of the European Union, “Council Conclusions – Horn of Africa, 16858/11”, Brussels, 14 November 2011; European Commission and High Representative of the European Union for Foreign Affairs and Security Policy, “Towards a Comprehensive EU Approach to the Syrian Crisis, JOIN(2013) 22 final”, Brussels, 24 June 2013.

## A deeper look at the assumptions: how to move towards a paradigm shift in a multipolar region?

The EU's overall response to the regional turmoil suggests that there is a willingness to engage and that the toolbox has expanded to make it more capable of getting involved in a broader range of issues. Alongside the ENP framework, CSDP and EOMs have been mobilised to target specific issues. Methodologically, the “comprehensive approach” is intended to connect the dots between the different EU tools and approaches, from development to military tools, to make them work better in unison.

The developments in the region, however, further challenge many of the assumptions upon which the EU has based its policies towards this part of the world – whereby by further it is understood that plenty of conceptual flaws in the EU's policy set up pre-dated the Arab Spring.

The path dependency between the EU's regional approach towards the Southern Mediterranean and the Middle East Peace Process is sometimes forgotten. Among the key objectives (at that time innovative) of the Euro-Mediterranean Partnership was the notion of contributing to building a region which was preparing for the peace to be heralded by the Oslo Accords. Although regional cooperation has been one of the most outstanding non-achievements of two decades of efforts, the MEPP has not produced the expected results, and now its centrality in Euro-Mediterranean relations is challenged by competing tragic events in other parts of the Arab world.

The concept of “differentiation” implies flexibility from a standard template rather than tailor made approaches towards individual situations. While this may appear an academic remark, the implication of a single template is that the degree of engagement with one country, the principles upon which such engagement will be based and the mobilisation of resources that such engagement will require will be evaluated by comparison with the policies devised towards other countries. Put differently, the question is whether the EU can justify the fact that in its relations with Tunisia it expects the accomplishment of reforms in line with its conditionality policy (on the basis of which financial commitments are disbursed), while with Egypt it does not exert the same pressure, given the weight of that country and the contribution expected from Cairo to Europe's broader security aims. It also implies that the template (in this case the ENP) is the most appropriate approach if accompanied by some flexible additional tools. In other words, it reinstates the ENP's overarching principle of alignment to EU norms as the advantageous policy for the receiving country.

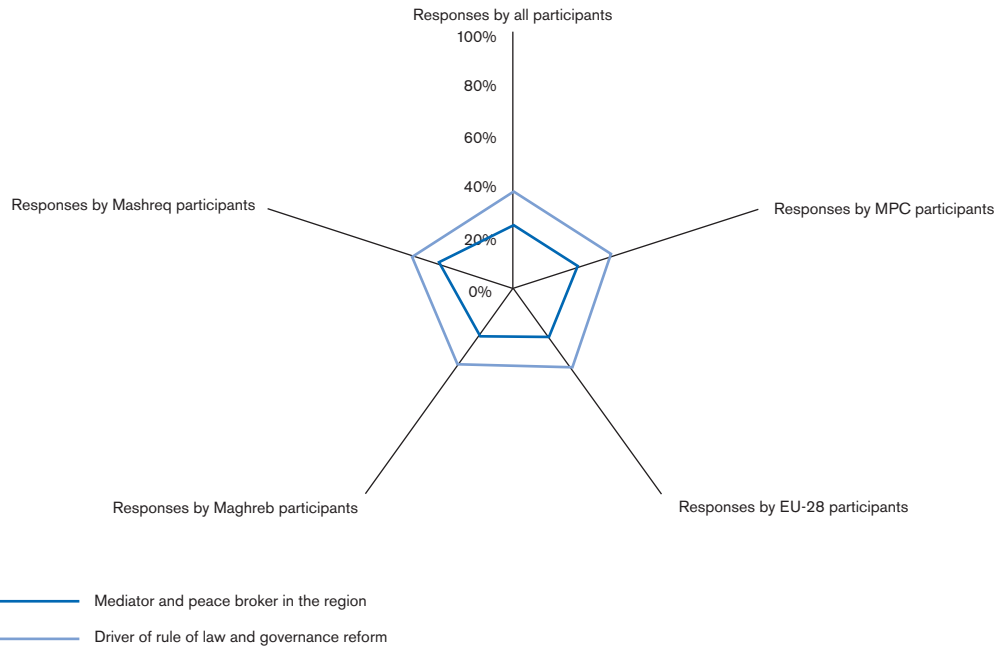
This, in turn, rests on the gravitational model of EU attraction which, in a multipolar region, is not necessarily competitive, with implications for the appropriateness of the conditionality-based model as well as the partnership principle.

**The EU policies designed to target a broader range of issues are challenged by the developments in the region.**

**The concept of “differentiation” implies flexibility from a standard template rather than tailor-made approaches towards individual situations.**

**The EU should consider whether the principles of conditionality and partnership continue to be appropriate in the multipolar MENA region.**

**Graph 2: Influence of the European Union in the present framework of a multipolar scenario**  
 (% of answers considering that the EU has a high or very high influence as a mediator and peace broker in the region and as a driver of rule of law)



This graph shows that, in the frame of the present multipolar scenario, only around 20% of respondents (both North and South, Maghreb or Mashreq) consider that EU influence as a peace broker in the region is high or very high. This rises to 40% when the EU as a driver of rule of law and governance reform is assessed.

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

**The new toolbox should be understood rather as a means and not as an end in itself.**

Finally, the changes in the region and the responses (differentiation, conditionality) pose the more normative dilemma again: how can the EU reconcile aims of creating security, restoring stability and supporting aspirations towards greater democratic principles in an increasingly contested and often hostile environment with multiple push and pull factors when the EU's overall influence is declining?

In strategic terms, the core dilemma for the EU is about engagement: the degree of engagement, how far this engagement should go, who to engage with, and on what grounds. The template of the European Neighbourhood, however much revised, has not addressed this,<sup>5</sup> nor does the "comprehensive approach" or the CSDP missions in the region and beyond offer many clues about the EU's review of the strategic challenges to Europe coming from North Africa and the Middle East and beyond.

**The EU needs to design a platform around which it could build alliances with other partners to achieve commonly agreed aims.**

While the additional basket of tools and the institutional capability to manage them are welcome developments, these processes will be of little consequence if they are not understood as means rather than ends in themselves. What continues to be lacking in the EU's engagement with the rest of the world is the shared purpose of such engagement, a common agenda towards which EU tools, institutions, and its Member States, can be mobilised, and a platform around which to build alliances with other partners to achieve commonly agreed aims.

5. For critiques of the ENP, see R. Balfour and A. Missiroli, *Reassessing the European Neighbourhood Policy*, EPC Issue Paper, No. 54, June 2007; Rosa Balfour, *Political Conditionality after the Arab Spring*, PapersIEMED, 2012; Kristina Kausch, *The End of the (Southern) Neighbourhood*, PapersIEMED, No. 18, 2013; and S. Lehne (2014), *Time to Reset the European Neighbourhood Policy*, Carnegie, February 2014.

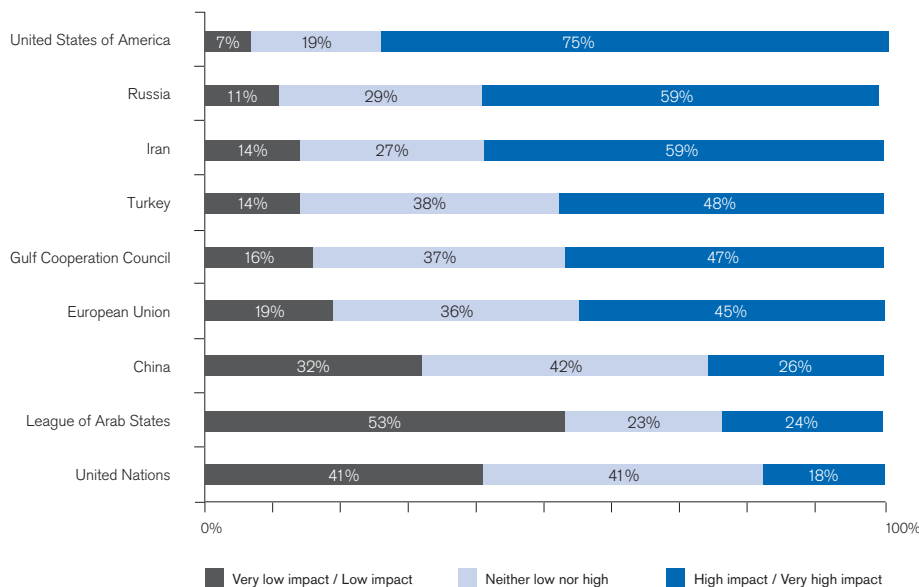
### Perceptions and expectations: the search for an EU role

The mismatch between potential and achievements seems to be a constant feature of evaluations of the EU's performance in international affairs. The famous formula of the "capabilities-expectations gap" developed by Christopher Hill in the early 1990s<sup>6</sup> is probably the most commonly used framework to assess the EU's policy output compared to its stated goals. In addition to asking a set of questions measuring the satisfaction with EU policies and initiatives (to which responses are largely negative), this year's Euromed Survey also asks other relevant questions on the impact of the EU on the region and the role of international actors, including the EU, in the region.

**The mismatch between potential and achievements seems to be a constant feature of the evaluations of the EU's performance.**

The results show a clear perception of greater multipolarity in the region. As seen in graph 3, even if the US continues to be seen as the most influential actor, a number of others also play an important role, with Russia and Iran seen as increasingly important (60% of respondents see these two countries as having a "very high" or "high impact"), while the EU is seen as having such impact in 46% of responses, alongside Turkey and the Gulf Cooperation Council.

**Graph 3: Assessing the impact of the following international players in the Southern Mediterranean countries**

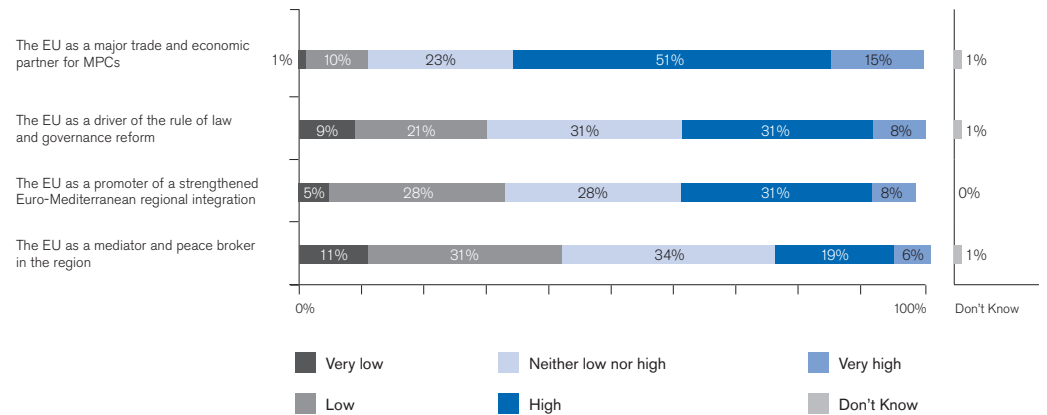


Source: Compiled by the IEMed based on the results of the 3rd and 5th Euromed Survey

6. C. Hill, "The Capabilities-Expectations Gap, or Conceptualizing Europe's International Role", *Journal of Common Market Studies*, Vol. 31, No. 3, 1993, pp. 305-328.

This is somewhat at odds with an overall expectation that the EU can play an important role in the region which emerges clearly from the Survey of experts. The EU is uncontroversially recognised as a major trade and economic partner (see graph 4), while one third of respondents also see a role in promoting regional integration and the rule of law and governance.

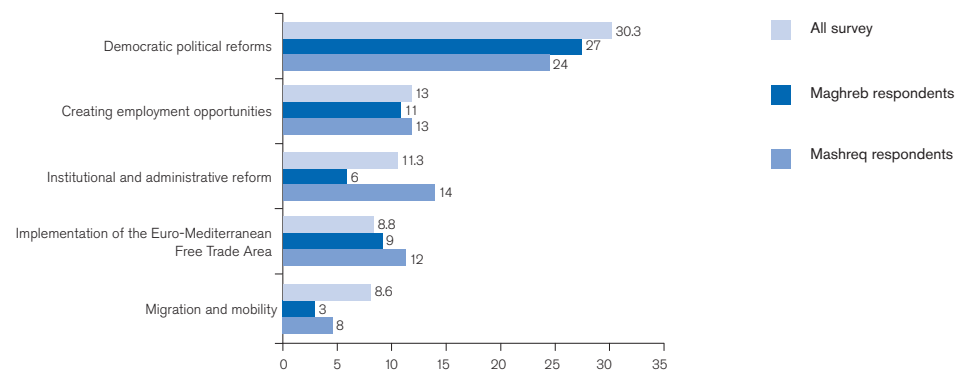
**Graph 4: Influence of the European Union in the present framework of a multipolar scenario**



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

Yet there is an expectation that the EU could play a stronger role in some of these areas, with democratic political reforms emerging as the top priority for the EU according to 30% of respondents (the second priority being creating job opportunities with 13%), see graph 5.

**Graph 5: EU's policies in the near future for the region: selecting policy areas according to its priority (5 areas considered to be 1st priority)**



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

These results based on expert surveys do not clash with the Eurobarometer surveys carried out during the autumn of 2013. Despite the criticism of the EU's performance and concrete impact, it still enjoys a benign view in North Africa (62% of Maghreb interviewees have a positive image) and partially in the Mashreq (with a much lower 42% and, notably, an extremely low 12% in Egypt). Here too, alongside the perception of the EU as an economic and commercial actor, many see the EU as potentially playing a role in peace and security and human rights.<sup>7</sup>

In twenty years since the conceptualisation of the capabilities-expectations gap, it can be argued that successive foreign policy reforms have done much in terms of capabilities. But the expectations continue to fall short of the performance, with the sum of the tools not corresponding to an overall strategy: there appears to be scope for the EU to perform better in the Southern Mediterranean, notwithstanding the current turmoil and uncertainty. Or, perhaps because of the uncertainty, the EU could even be seen as a potential “force for good”, helping the region with its key factors of instability. The decision about which course of action to pursue will be for the next EU leaders to take.

**Despite the current turmoil and uncertainty the EU could perform better and be seen as a “force for good”.**

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7. “Baromètre du voisinage de l'UE. Sud de la Méditerranée”, autumn 2013.

# THE ROLE OF THE GCC IN THE SOUTHERN MEDITERRANEAN COUNTRIES: REACTIVE RESPONSE MORE THAN PROACTIVE ENGAGEMENT

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**SILVIA COLOMBO**

Research Fellow at the Istituto Affari Internazionali (IAI)

**Since 2011, the GCC countries have increased their presence in the Southern Mediterranean region.**

Since 2011, much talk has been heard about the impact and alleged leverage of the Gulf Cooperation Council (GCC) on developments in the Southern Mediterranean countries. This impact is the direct consequence of the actions undertaken by the GCC in response to the Arab uprisings, which caught the Arab Gulf governments as much by surprise as they did in the case of other international players, such as the European Union (EU). These actions were also accompanied by unprecedented visibility of the GCC as a regional player on the international scene.

The GCC countries have arguably increased their presence, be it material or ideational, in the Southern Mediterranean region, thus also contributing to blurring the artificial division line that the EU had drawn between North Africa and the Middle East, on the one hand, and the Gulf region, on the other. Whether through direct military intervention, economic support or political and religious influence, the GCC countries' increased presence in the post-Arab Spring context has been appreciated by a number of observers, both from the Southern Mediterranean countries and from Europe.

**The type of activism of GCC countries is the activism of the individual governments rather than that of the GCC as an organisation.**

Their actions have been particularly felt in the Middle East, which has historically been more prone as a region to the meddling and interference of external and regional actors. The protracted civil war in Syria, the precarious stability of Lebanon, as well as the crisis in Iraq resulting from the jihadist takeover of a number of key towns are the contexts in which the GCC countries' presence is more prominent and their impact potentially felt the most.

Against this backdrop and in light of the upward trend experienced by the GCC countries in terms of their impact on the Southern Mediterranean vis-à-vis other players, including the EU, in the past three years, a few considerations can be advanced. First, talking about "impact" seems premature when it comes to the GCC's engagement with the Southern Mediterranean countries. While a certain degree of influence and leverage cannot be denied, particularly when they are the result of ambitious and, arguably, unsustainable assistance packages and investments made available to the cash-strapped economies of the Southern Mediterranean, what we are observing today is more the GCC countries' activism in a region in which chaos and the lack of (a new) order still dominate.

Second, the type of activism we have been witnessing on the part of the GCC countries in the past three years has some peculiar features. It is the activism of the individual governments in the region more than that of the GCC as an organisation, which, after some initial attempts to revamp its role in catering for security and mutual cooperation in the Gulf region, has been almost completely sidelined by Saudi Arabia and Qatar, whose competition sometimes bordering open conflict has further diminished its relevance. As already recalled, the GCC countries' activism has manifested itself as a direct response to the Arab uprisings and their potential spread to the Gulf region.

It has indeed been reactive and mainly dictated by the sometimes conflicting domestic agendas of each country. In this respect, it is not so striking that Saudi Arabia and Qatar have welcomed the ascent of the mainstream Islamist movements to power in some Southern Mediterranean countries in a markedly different way, despite sharing concerns about abrupt changes in the regional status quo. Similarly, different domestic considerations have played a role in shaping the stances of Riyadh and Muscat with regard to the Iranian nuclear issue. Finally, the overall response of the GCC countries to the Arab uprisings and the ensuing transitions has been characterised by pragmatism more than any kind of vision for the region, which makes future gains in terms of leverage and impact increasingly difficult to assess.

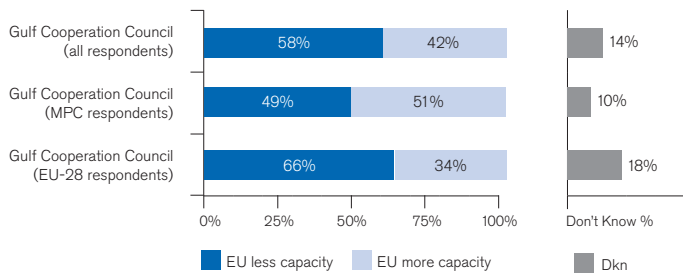
**The overall response of the GCC countries to the Arab uprisings has been reactive, pragmatic and dictated by conflicting domestic agendas of each country.**

What does all this mean for the EU's engagement with the GCC, particularly in the Southern Mediterranean region? The GCC is regarded as having a greater role in the Southern Mediterranean than the EU (see graph 1). This is particularly true in the eyes of European observers, who tend overall to perceive such a role as something unprecedented and potentially detrimental to Europe's influence in its neighbourhood. After a careful assessment of the GCC countries' activism, its motivations and goals, European policy-makers should make an extra effort to engage with their Gulf partners, both at the bilateral and multilateral levels, with a view to channelling such an activism in promoting peace, stability and democracy in their common neighbourhood. By initiating a dialogue on security and prosperity in the Southern Mediterranean and by taking concrete cooperative actions, the EU and the GCC could also work together to unlock the unfulfilled potential of their mutual cooperation.

**European policy-makers should engage with Gulf countries in order to direct their activism towards promotion of peace, stability and democracy in a common neighbourhood.**

**Graph 1: Assessing the EU's future role in MPCs compared to GCC**

(the graph below shows the EU's relative capacity to influence regional developments compared to other actors)



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

# RUSSIA, CHINA AND TURKEY: NEW PLAYERS IN THE SOUTHERN MEDITERRANEAN COUNTRIES?

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AHMED KANDIL

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**The apparent shift in US foreign strategic priorities prompted pro-western states in the region to seek alternative partners.**

Discussion of the outside engagement in the Southern Mediterranean Region (SMR) has revealed conflicting views and concerns. However, the US remains the only outside power capable of decisively intervening in this region (which includes Egypt, Syria, Jordan, Lebanon, Occupied Palestinian Territories, Algeria, Libya, Tunisia and Morocco), particularly in concert with its allies in the EU. Others, such as Russia, China and Turkey are able to exert influence, but none can impact the region as the US is capable of doing.

In this context, there were differences of view as to whether the US is really withdrawing from the region and what this would mean. Most experts in Egypt as well as in many Arab countries were of the view that it would be a negative development if it happened. However, this did not mean that everyone liked the way the US presently interacts with the region. In Syria, for example, the US's failure to provide any significant support for the Syrian rebels or hold the Bashar al-Assad regime to account for the use of chemical weapons has frustrated its Arab allies, particularly in the Gulf region. Furthermore, the hold placed by the Obama administration on military aid to Egypt has also negatively affected the US's image in the region because this was seen as evidence by many Egyptians and Arabs that the US was favoring the Muslim Brotherhood group, which was considered recently as a terrorist group in many Arab countries. In addition, the announcement by the US administration of its infamous "pivot to Asia" and of cuts in the defense budget indicated that an American disengagement from the region was imminent. Views were expressed that the SMR's main problem with the US may soon not be with a US that intervenes too much in the region, but with a US that largely goes home and leaves the region to its own devices.

**Russia's advocacy for the principles of stability, state sovereignty and non-interference makes it an attractive partner to many Southern Mediterranean states.**

In the psyche of many Arab policy-makers, the apparent structural shift in US foreign strategic priorities overshadowed any reassurances to the contrary reiterated by US officials. The notion of a weak, undependable US has, therefore, prompted pro-western states in the region, Egypt and Saudi Arabia above all, to weigh alternative arrangements and press ahead with their regional agenda, often irrespective of US preferences. In this context, Russia, in particular, has emerged as a lucrative alternative partner, especially in light of its unshakeable commitment to its regional allies: Syria, under the al-Assad regime, and Iran. In the meantime, the reactions of Russia showed its willingness to become a more active player in the SMR to defend its growing interests. Since the start of the Arab Spring or the "democratic storms" in Tunisia, Egypt, Syria and Libya, the Russian leadership has advocated stability, return to normalcy and holding high the banner of state sovereignty and non-interference. These principles were attractive to many policy-makers in the SMR. Therefore, it was not strange that Egypt's elected president Abdul Fattah al-Sisi paid his first foreign visit to Russia in February 2014, following the ousting of former Egyptian President Mohamed Morsi in July 2013. After this visit, many Egyptians looked at Russia as a new possible partner and ally because of its "huge" capabilities in military and energy areas. Egypt, which faces ongoing Islamist insurgency, particularly focused in the Sinai Peninsula, has sought a \$2 billion arms deal with Russia. The deal would probably include financial support from Saudi Arabia and the United Arab Emirates (UAE). Although this deal has not been finalized yet, it was very important for the new Egyptian leadership in the light of

the US's hold on its military aid to Egypt at this critical time in dealing with the terrorist groups in Sinai. In addition, Russia also has huge energy supplies which could help Egypt facing a serious energy shortage crisis. Last May, it was announced that Egypt will obtain a favorable rate with long grace periods for its imports of Russian natural gas during 2014 and 2015.

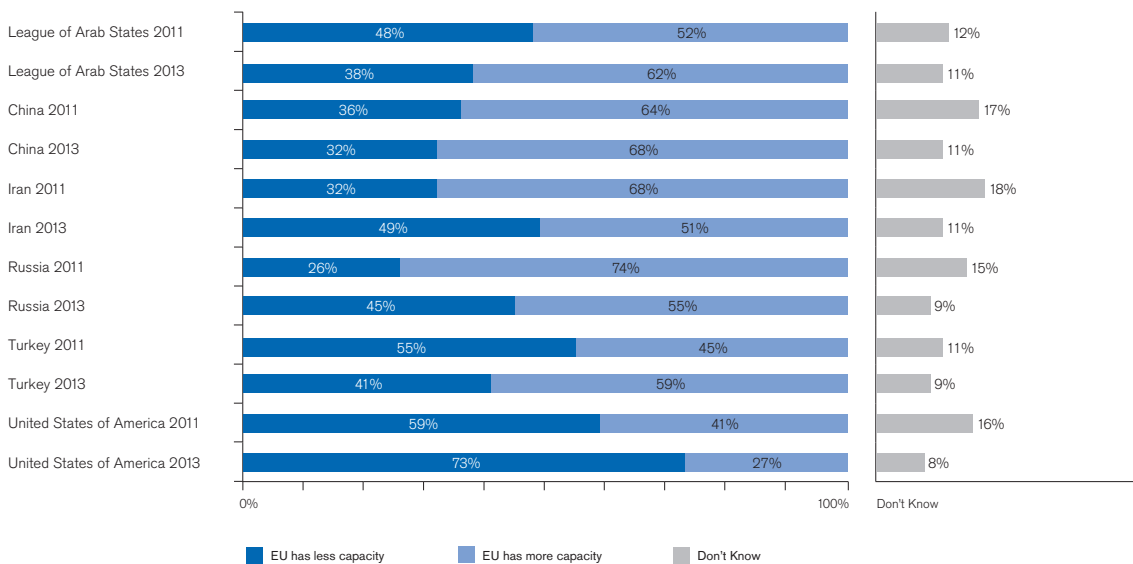
In addition, Russia, under the leadership of President Vladimir Putin, may also find that its arms and energy supply diplomacy in the SMR will probably be helpful in its strategic competition with the US, especially after the Ukrainian crisis.

In addition to Russia, China is also becoming more and more influential in the SMR. Economically, China has been involved for decades in sizeable infrastructure projects in the region. China also has strong trade ties with many countries in the region. The number of Chinese tourists has also increased dramatically in recent years. However, Beijing seems to avoid any direct involvement in the complicated political environment in the SMR. One clear sign of this passive attitude is the limited number of high official visits from the Chinese side to the region. Nevertheless, many observers expected China to become a more active political player to defend its growing economic and political interests in the region. From their bad experience in Libya, where they lost several economic and commercial gains after the collapse of the Gaddafi regime, the Chinese leaders recognized that their low political profile in the region would no longer be useful.

**China is expected to become a more active political player to defend its economic and political interests in the region.**

In the near future, and as indicated in the results of the 5th Euromed Survey, it is likely that the impact of Russia and China will continue to increase (see graph 1) in the SMR for several reasons:

**Graph 1: Assessing the EU's future role in MPCs compared to other regional and international actors. Comparing 2011 and 2013 survey results.** (The graph below displays the EU's relative capacity to influence regional developments compared to other actors).



Source: Compiled by the IEMed based on the results of 3rd and the 5th Euromed Survey

**Russia and China's opposition to the international western intervention in the region may result in their growing influence in the MENA region.**

First, history shows that the opposition of Russia and China to the international (western) intervention in the SMR is highly appreciated by many Arab peoples who are still suffering from the negative consequences of such intervention in Palestine, Iraq and Sudan.

Secondly, Russia and China have a “white history” with all Arab countries. There is no colonialist heritage, no territorial disputes and no serious immigrant problems. In addition, many in the SMR have generally considered Russia and China as friends and supporters of Arab causes for the past 60 years. During the past three decades, many Arabs also admired China for its economic achievements. As such, Russia was also viewed as a military partner in some countries in the SMR.

Thirdly, Russia and China, with their growing financial and technical capabilities and in cooperation with the rich Arab Gulf countries like Saudi Arabia, the UAE and Kuwait, could create a new “developmental fund” to support the sustainable development projects in the SMR, especially in the following areas: labor-intensive industries, new technologies in the agricultural sector, infrastructure projects, and renewable energy. This fund can play a significant role in achieving self-sufficiency in food and energy and creating new job opportunities as well as new investment opportunities for Russian and Chinese companies.

**As long as Erdogan continues his current policies, Turkey is likely to lose its impact in the region.**

In contrast to the expected growing impact of Russia and China in the SMR, Turkey would likely lose its high impact in the region in the near future. In the last few years, Ankara had enjoyed a growing influence in the region because of its economic success and moderate Islamism. Its “zero problems with neighbors” foreign policy contributed to its high impact in the region. This foreign policy enabled Turkey to expand business and trade links with many Arab states, as well as Iran, and even helped mediate some of the region’s toughest disputes, brokering talks between Syria and Israel, Fatah and Hamas, and Pakistan and Afghanistan. However, this high impact of Turkey would probably be reversed in the region because the Turkish Prime Minister Recep Tayyip Erdogan seems to fail in building bridges with the new ruling regime in Egypt. He also started a war of words with the Gulf countries and Israel for having a hand in the “coup” that removed former President Morsi from power. This failure led Turkey and Egypt to pull their ambassadors from each country amidst the dispute. It is not only in Egypt where Turkey is now having a problem. In Iraq, Ankara has also openly defied Prime Minister Nouri al-Maliki’s government, accusing it of fomenting sectarian strife and going behind its back to negotiate oil deals with the Kurdish regional government, which administers the country’s north. In Syria, Turkey has also lent unqualified support to the anti-regime rebels, letting them operate freely on its soil, turning a blind eye to their atrocities, and reportedly criticizing the US for branding the al-Qaeda-linked Jabhat al-Nusra a terrorist group. In addition, Turkey’s image in the West took a beating this summer with the protests in Gezi Park. Erdogan’s decision to put down the demonstrations with riot police, tear gas and water cannons undermined his relationship with the EU. For all these reasons, Turkey will be less likely to exercise a real and positive influence over the SMR as long as Mr Erdogan keeps his current policies which have almost left no friends for Turkey.

# ASSESSMENT OF EU POLICIES IN THE MEDITERRANEAN

**ERWAN LANNON**

Professor, University of Ghent and College of Europe

This analysis focuses on the questions of block D of the Euromed Survey that were related to “An Assessment of EU Policies in the Mediterranean”. This block includes a first question on the potential “priorities of the EU’s policies in the near future” and a second one on the assessment of the “visibility and impact of the EU’s actions on Mediterranean Partner Countries in 2013.” The third one was devoted to an assessment of the impact of some specific ENP measures on the Southern Mediterranean countries. The last question relates to a ranking of 15 projects of the Union for the Mediterranean (UfM).

**The way the EU evaluates the progress achieved in implementing action plans and its consistence in applying “deep and sustainable democracy criteria” will be crucial.**

This Survey took place in a very specific context as 2013 marked the end of the first operational phase of the ENP that lasted from 1 January 2007 to 31 December 2013, respectively the dates of the entry into force and termination of the European Neighbourhood and Partnership Instrument (ENPI). The new European Neighbourhood Instrument (ENI) designed to succeed the ENPI was supposed to enter into force on 1 January 2014 but as the negotiations between the European Parliament and the EU Council on the new Multiannual Financial Framework (MFF) and on some financial regulations, including the ENI, took more time than expected, the ENI was only published in March 2014.<sup>1</sup>

The objective of this short analysis is thus to go beyond the pure factual analysis of the responses to the Survey and to put them into context.

## Defining the priorities of the EU’s policies for the near future

Defining the priorities of the EU’s policies for the near future is not an easy task given the numerous challenges the Mediterranean region is currently facing. Moreover, the order of priorities might be different for EU Member States and Mediterranean Partner Countries and may vary from one country to another. Among the 11 priorities, the five that were identified by the respondents as being the most important are the following (see graph 1):

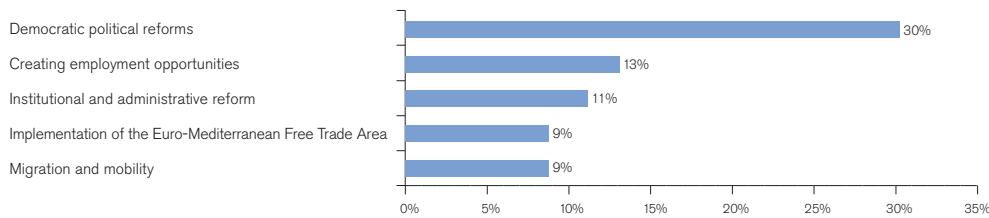
The first priority, i.e. “Democratic political reforms”, has been clearly identified as such by a third of respondents, the highest percentage coming logically from the MPCs (33% for the MPCs, 27% for the EU countries). Moreover, the importance of this priority is fully confirmed by the fact that 63% of respondents ranked it among the top five priorities. The impact of the Arab revolutionary processes is obvious here and certainly includes some thoughts about the latest developments in Libya and Egypt. There is thus a good convergence with the EU’s actions as the new generation of ENP Action Plans “include detailed provisions on democracy, human rights and good governance, setting concrete benchmarks for freedom of expression, the media, association and assembly, religion and belief, and for women’s rights, transparent elections; and the independence of the judiciary.”<sup>2</sup>

1. Regulation (EU) No 232/2014 of the European Parliament and of the Council of 11 March 2014 establishing a European Neighbourhood Instrument, OJ L 77, 15 March 2014, pp. 27-43.

2. Neighbourhood at the Crossroads: Implementation of the European Neighbourhood Policy in 2013, Brussels, 27 March 2014, SWD (2014) 100 final.

**Graph 1: EU's policies in the near future for the region: selecting policy areas according to its priority**

(5 areas considered to be 1st priority)



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

Communication on the revision of the ENP.<sup>3</sup> If so, a number of MPCs should, in theory, face a reallocation of financial resources. The danger of a “double standard approach” perception is never far away and this is certainly one of the major challenges the EU will have to face with the first progress reports to be adopted under the “deep and sustainable democracy umbrella.” In other words the question is: how will the new reinforced conditionality approach survive the “reality test”?

The second priority identified by the respondents is “creating employment opportunities.”<sup>4</sup> This is also not a surprise given the very high level of unemployment in MPCs especially for young graduates. The Arab uprisings were not only based on demands for dignity or respect for fundamental freedoms but also on “decent jobs” and the fight against corruption. The focus that the European Commission and the High Representative already put on SMEs in March 2011, within the framework of the Joint Communication on “A Partnership for Democracy and Shared Prosperity in the Southern Mediterranean” in order to promote “sustainable and inclusive growth and economic development”<sup>5</sup> was concretised by the fact that the EU “put forward multiple initiatives to support the promotion of SMEs and job creation and around EUR 850 million of bilateral assistance has been devoted to these objectives since 2011.”<sup>6</sup> Finally, it should be emphasised that 66% of respondents ranked it among the top five priorities, so with a higher percentage than the first priority.

The third priority relates to “institutional and administrative reforms”<sup>7</sup> that are indeed badly needed in certain countries. This is very much linked to issues such as “good administration” and the “fight against corruption.” The reforms of the constitutions and of the judiciary are key to the success of political but also economic reforms. For instance, a reliable judiciary can promote Foreign Direct Investment (FDI). Key constitutional reforms have been initiated in a number of MPCs such as Egypt, Jordan, Morocco and Tunisia but as far as the judicial reform is concerned the European Commission acknowledged in 2014 that “very limited progress” could be reported in this regard, “even though judiciary remains a key element of all ENP Action Plans and related programming.” Moreover, the “revised EU approach to the use of budget support includes new eligibility criteria on transparency and oversight of public finances. The fight against corruption is also tackled through projects under the European Neighbourhood

**The reforms of the constitutions and of the judiciary in Southern Mediterranean countries are key to the success of political and economic reforms.**

3. “Free and fair elections; freedom of association, expression and assembly and a free press and media; the rule of law administered by an independent judiciary and right to a fair trial; fighting against corruption; security and law enforcement sector reform (including the police) and the establishment of democratic control over armed and security forces.” European Commission and High Representative Joint communication on “A new response to a changing Neighbourhood”, Brussels, 25 May 2011, COM(2011) 303 final, p. 3.

4. First priority for 13.1% of respondents (15% for EU Member States, 11% for the MPCs).

5. Joint Communication of the Commission and the High Representative on “A Partnership for Democracy and Shared Prosperity in the Southern Mediterranean”, Brussels, 8.3.2011 COM(2011) 200 final, p. 3.

6. Neighbourhood at the Crossroads: Implementation of the European Neighbourhood Policy in 2013.

7. First priority for 11.3% of respondents; for 54% of respondents it should be ranked among the top five priorities.

**Conclusion of free trade agreements with the EU will enable Morocco, Tunisia, Egypt and Jordan to deepen their existing Euro-Mediterranean Association Agreement.**

and Partnership Instrument (ENPI) and the European Instrument for Democracy and Human Rights (EIDHR)."<sup>8</sup>

The implementation of the Euro-Mediterranean Free Trade Area is considered as the fourth priority (8.8% of the respondents ranked it in 1st position). One should remember that initially 2010 was the target date for establishing the Euromed FTA. Today Libya and Syria are still excluded from this process while, at the other end of the spectrum, Morocco, Tunisia, Egypt and Jordan could benefit from a deepening of their existing Euro-Mediterranean Association Agreement with the conclusion of a Deep and Comprehensive Free Trade Area<sup>9</sup> with the EU. Again, one must recall here the specificity of the panel of respondents. Experts are aware of the potential positive impact of Euromed on trade but also on FDI that is still needed, especially from the EU. This also explains why 39% of respondents ranked the Euromed FTA among the top five priorities. One should also underline that in principle the finalisation of the Euromed FTA, which corresponds to a shadow economic integration, should be achieved *before* the finalisation of the negotiations of the DCFTAs.

**Regular immigration and mobility have always been considered relevant incentives for implementing costly reforms by most of the Mediterranean Partner Countries.**

The fifth and last priority identified is a key issue in Euromed relationships: "migration and mobility."<sup>10</sup> Regular immigration and mobility have always been considered as relevant incentives for implementing costly reforms by most of the MPCs. The fact that Morocco and Tunisia signed their mobility partnerships respectively on 7 June 2013 and on 3 March 2014 and that the discussions started with Jordan in December 2013 are positive signs.<sup>11</sup> However, it remains to be seen how those mobility partnerships will be implemented given the very political dimension of readmission processes, for example. Having the legal tools without the political will is a dead-end. In terms of irregular immigration, the flows of refugees crossing the Mediterranean have increased and Lampedusa has become the symbol of this human tragedy.<sup>12</sup> The EU Council therefore decided to "set up a multi-institutional Mediterranean Task Force to prevent such incidents in the future and discuss the ways to address the issue of irregular migration across the Mediterranean."<sup>13</sup> The proposals of the Task Force were endorsed by the 2013 December European Council.<sup>14</sup> Moreover, a "wider debate on migration and asylum issues is scheduled for the June 2014 European Council."<sup>15</sup> Migration is also unfortunately an issue that has been extensively used by populist parties across the EU during the European Parliament election campaign. The current composition of the new European Parliament, with representatives developing strong anti-immigration discourses, might generate lively debates, bearing in mind the increased conditionality and flexibility introduced within the new ENI.

For the other priorities listed in the Survey (transitional justice; security sector reform; economic governance; partnership with civil society; women's empowerment; development of youth policies), 5 to 6% or less of respondents put them in first position. However, considering the results as a whole (cumulating all results) the picture is quite different:

8. SWD(2014) 100 final, op. cit.

9. The EU Council adopted in 2011 the negotiating directives for DCFTAs with Egypt, Jordan, Morocco and Tunisia. Negotiations with Morocco were launched in March 2013.

10. Here 8.6% of respondents identified this as being the first priority (11% for EU Member States and 7% for the MPCs). 45% of respondents ranked it among the top five priorities.

11. To support the dialogues and implementation of the Mobility Partnerships, the European Asylum Support Office (EASO) and Frontex decided to propose a joint project to promote participation by Morocco, Tunisia and Jordan in their work from 2014 "Neighbourhood at the Crossroads: Implementation of the European Neighbourhood Policy in 2013".

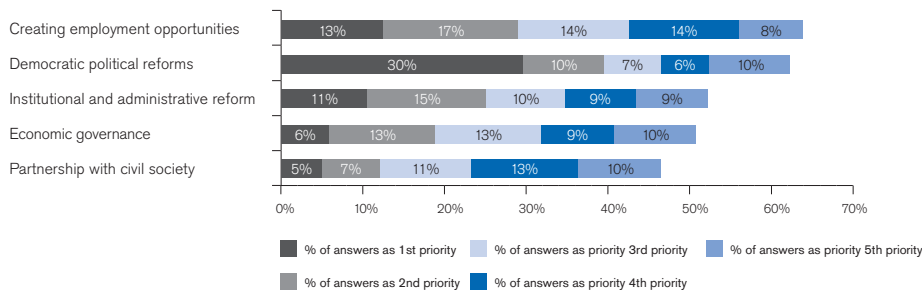
12. Also in Eastern Mediterranean, the Syrian crisis is of major concern. According to the Commission, "since the beginning of 2013 25 EUR 315 million from the ENPI was used to address the consequences of the Syrian crisis (in Syria and in the neighbouring countries). In addition, EUR 350 million in humanitarian aid from the EU budget was allocated to the Syrian crisis." SWD(2014) 100 final, op. cit.

13. SWD(2014) 100 final, op. cit.

14. See the conclusions of the 2013 December European Council, p. 21, [http://www.consilium.europa.eu/uedocs/cms\\_Data/docs/pressdata/en/ec/140245.pdf](http://www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/ec/140245.pdf).

15. SWD(2014) 100 final, op. cit.

**Graph 2: EU's policies in the near future for the region: selecting policy areas according to its priority**  
(cumulated % of answers choosing the priority of five EU policies)



Source: Compiled by the IEMed based on the results of the 3rd, 4th and 5th Euromed Survey

It must be stressed that the development of youth policies is not considered a top priority despite the fact that this generation played a crucial role in the Arab revolutions.

### Assessing the visibility and impact of the EU's actions and the efficiency of specific measures: a major challenge for the European Union

As the first phase of the ENP has come to an end, it is now possible to start to draw some preliminary conclusions on the visibility and impact of the EU's actions in MPCs. The question of the Survey referred specifically to the year 2013 but it is clear that the responses can be extended beyond this year, as it has been a recurrent issue. In fact, for the visibility of the EU's actions the result is very clear, as for almost half of respondents (49%) the visibility is very low (8%) or low (41%). 29% consider it is neither low nor high and only 20% consider that the visibility is high (17%) or very high (3%). In other words, despite the fact that this issue has been identified by the EU institutions and that some measures were taken in this regard, the perception among experts is that the visibility of the EU's actions remains a major issue. Innovative actions are thus still needed. In the framework of the ENP revision, the term "visibility" is only mentioned twice. Once for the Eastern Partnership and once regarding the fact that "efforts should also be made to further associate Civil Society to the design and monitoring of operations and enhance their visibility."<sup>16</sup>

Concerning the "impact of the EU's actions", the evaluations made by respondents are also straightforward: 40% consider that the impact is low (34%) or very low (6%). 36% consider it neither low nor high and only 23% high (21%) or very high (2%). It has to be noted that EU respondents are more severe in their evaluations. 43% consider that the impact is low or very low against 38% of the MPC respondents. Compared to the results of the last Survey, it is important to note that the assessment of the visibility and the impact of the EU's actions has evolved:

For 41% of respondents, the impact is very low or low, compared to 28% in 2012. 23% consider that the impact is high to very high, compared to 28% in 2012.

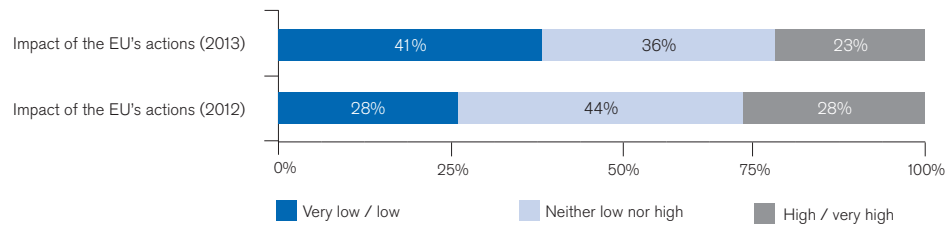
It is not easy to explain this trend but the ENP revision implies an increasing complexity and a reinforced differentiated approach that might be considered as explanatory variables.

**Given the political dimension of readmission processes, it remains to be seen how the mobility partnerships will be implemented.**

**The new composition of the European Parliament might generate lively debates on the issue of migration.**

16. European Commission and High Representative Joint Communication on "A New Response to a Changing Neighbourhood", Brussels, 25 May 2011 COM(2011) 303 final, p. 29.

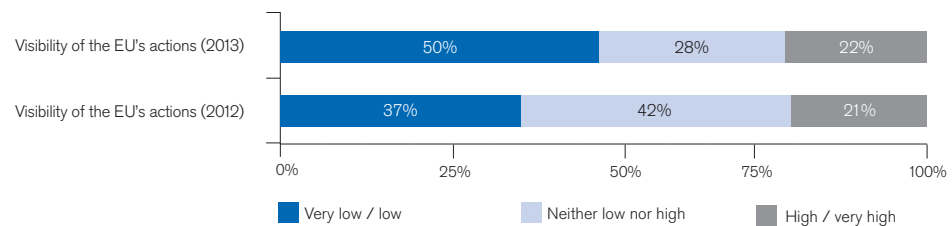
**Graph 3: Assessing the impact of the EU's actions in Mediterranean Partner Countries**  
(comparing 2012 and 2013 results)



Source: Compiled by the IEMed based on the results of the 4th and 5th Euromed Survey

For 50% of respondents, the visibility is very low or low, compared to 37% in 2012. 22% consider the visibility is high or very high, compared to 21% in 2012.

**Graph 4: Assessing the visibility of the EU's actions in Mediterranean Partner Countries**  
(comparing 2012 and 2013 results)



Source: Compiled by the IEMed based on the results of the 4th and 5th Euromed Survey

The third question relates to an assessment of the impact of a series of seven specific measures of the ENP on the Southern Mediterranean countries.<sup>17</sup> Among them, the three following ENP measures are considered to have a low or very low impact:

- I) "Mobility Partnerships" to enhance mobility and improve visa facilitation, for 47% of respondents. Only 27% consider that the impact is high or very high;
- II) "Support for Partnership, Reform and Inclusive Growth (SPRING) programme to provide support for democratic transformation, institution building and economic growth in the wake of the Arab Spring," for 45% of respondents, only 22% consider the impact high or very high;
- III) The "reallocation of extra financial resources to support the transition to democracy," for 43% of respondents. 27% of respondents consider the impact to be high or very high.

These results are quite interesting as most of these measures are considered priorities for the EU's policy in the near future (see question D1). For the Mobility Partnerships, it is perhaps a little early to draw definitive conclusions as the first partnerships were signed recently (see above). For the SPRING programme one should remember that it was mainly based on existing measures. Finally, for the "reallocation of extra financial resources to support the transition to democracy" it must be stressed that this is the direct consequence of the adoption of the so-called "more for more approach" and that the appraisal is quite diverse with respondents of the Maghreb countries being far less enthusiastic than the ones from the Mashreq (16% compared to 9%).

17. Support for the Partnership, Reform and Inclusive Growth (SPRING) programme to provide support for democratic transformation, institution building and economic growth in the wake of the Arab Spring; Reallocation of extra financial resources to support the transition to democracy; "Mobility Partnerships" to enhance mobility and improve visa facilitation; Deep and Comprehensive Free Trade Agreements (DCFTA) and other market access initiatives; Neighbourhood Civil Society Facility to strengthen the capacity of civil society to promote reform and increase public accountability; European Endowment for Democracy to help political parties, non-registered NGOs, trade unions and other social partners; Facility for Agriculture and Rural Development.

For the four other measures of the ENP, the responses are rather mitigated:

I) "Facility for Agriculture and Rural Development" (27% high and very high impact and 39% low to very low impact);

II) "European Endowment for Democracy to help political parties, non-registered NGOs, trade unions and other social partners" (28% high and very high impact and 39% low to very low impact);

III) "Neighbourhood Civil Society Facility to strengthen the capacity of civil society to promote reform and increase public accountability" (33% high and very high impact and 34% low to very low impact);

IV) "Deep and Comprehensive Free Trade Agreements (DCFTA) and other market access initiatives" (34% high and very high impact and 34% low to very low impact).

What is striking here is that for each of these four measures, approximately one third of respondents expect a high to very high impact, one third a low to very low impact and one third considers it neither low nor high. It should be noted that between 11% and 19% of the respondents did not know how to answer. The only conclusion is that a serious effort is needed in terms of information and visibility.

### The Union for the Mediterranean projects

It need hardly be recalled that the genesis of the Union for the Mediterranean was quite epic. Once partly "communitised" through the "Barcelona Process: Union for the Mediterranean"<sup>18</sup> framework and once the previous system of co-presidencies was amended according to the Lisbon Treaty, things started to improve. With a new Secretary General and a new mandate that includes the management of the Euromed sectoral ministerial meetings,<sup>19</sup> things have recently evolved in the right direction. As underlined by the European Commission in March 2014: "after a lapse of several years, UfM ministerial meetings resumed. Three were held in autumn (on strengthening the role of women in society in September, transport in November, and energy in December)."<sup>20</sup> This is undoubtedly good news as the ministerial meetings are the arenas where the multilateral projects are actually proposed. As the core of the work of the UfM Secretariat remains the project-based approach, identifying clear priorities has become increasingly important as more and more projects are currently being "labelised" by the UfM Secretariat.<sup>21</sup>

The fourth question related to the degree of priority to be attributed to 15 projects of the Union for the Mediterranean covering six sectors of cooperation. (see graph 5).

**A serious effort is needed in order to enhance the information and visibility of the European Neighbourhood Policy.**

**With a new Secretary General of the UfM and a new mandate that includes the management of the Euromed sectoral ministerial meetings things have evolved in the right direction.**

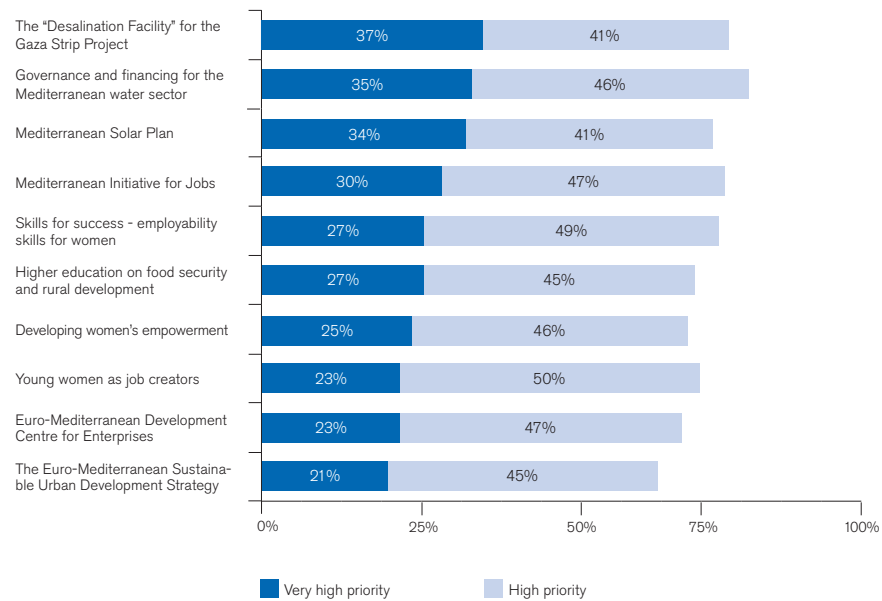
18. Communication from the Commission to the European Parliament and the Council of 20 May 2008 on the "Barcelona Process: Union for the Mediterranean", COM(2008) 319 Final.

19. European Commission and High Representative Joint Communication on "Delivering a New European Neighbourhood Policy", Brussels, 15 May 2012, JOIN(2012) 14 final.

20. N SWD(2014) 100 final, op. cit.

21. See <http://ufmsecretariat.org/>

**Graph 5: Degree of priority attributed to the following projects of the Union for the Mediterranean**  
(ordered by % of “Very high priority” answers)



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

What is interesting here is that respondents mainly emphasise the “environment and water sector” (even through the Gaza Strip project also has a very political dimension) as well as “business development” and “social and civic affairs”, which are related to women. The employment dimension is also essential in this appraisal.

The five remaining projects (completion of the central section of the trans-Maghreb motorway axis; Euromed Masters and PhDs; LOGISMED training activities; Creation of the Euro-Mediterranean University of Fes; Jordanian railway network) have been less prioritised. This can be explained partly by the quite technical nature of some of them but the two academic projects are, surprisingly, not well ranked despite the fact that the deepening of the economic integration will address the so-called “behind the border issues” (technical standards, legal approximation, etc.) and will require more and more experts and regular trainings.

# ASSESSING THE EU'S POLICIES IN THE MEDITERRANEAN: PRIORITIES OF THE ENP

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**MICHAEL A. KÖHLER**

Director Neighbourhood, DG Development and Cooperation – EuropeAid

**The EU cannot provide support for the political process unless partner countries are willing to reform.**

Once again, the results of the Euromed Survey, which has now gone into its 5th year, provide a very interesting set of findings, presenting a unique insight into the perception of the European Neighbourhood Policy (ENP) by both EU countries as well as its partner countries. The Survey gives plenty of food for thought as it carefully and critically scrutinises the ENP's performance.

The findings show that the respondents' opinions endorse to a large extent the policy approach of the ENP. In question D1 respondents were asked to "select and arrange [a set of policy] areas according to what [they] believe should be the priorities of the EU in the near future" regarding its Euro-Mediterranean policies. The majority of responses send a positive signal, as they show that a high demand seems to exist for EU support for democratic political as well as institutional and administrative reform. In fact, the ENP is already acting upon this demand, as the EU is building partnerships with its southern neighbours in order to accompany and support their reform agenda and foster democratic political transition. In addition, the ENP programming for the years to come foresees strong support for reform efforts towards democratic values, respect for human rights and the rule of law, as well as the capacity-building of and partnerships with civil society actors.

**The ENP must be understood as a partnership with its neighbours for which mutual commitments are a precondition for success.**

Nevertheless, the dynamism for political transition and democratic reforms which was prevalent in the southern neighbourhood in 2011 has largely disappeared in 2014. Where partner countries are unwilling to reform, the EU has no possibility to provide support for the political process. This point underlines the caution that needs to be applied when measuring the impact of ENP measures. The ENP must be understood as a partnership with its neighbours within which mutual commitments are preconditions for success.

In question D3 respondents were asked to "assess the impact of [certain] measures of the ENP on the Southern Mediterranean countries." The results presented indicate an overall trend of assessing the ENP measures' effectiveness as rather low – a finding which should provide motivation to repeatedly verify whether the ENP is designed the right way. One very interesting observation to be made is that countries in the Mashreq seem to rather positively assess the impacts that ENP measures have on the ground, while countries in the Maghreb make rather pessimistic assessments. The EU tries to respond to partner countries' specific needs by differentiating its assistance package for each partner. Nevertheless, in this regard it should not be overlooked that countries making up the Maghreb or the Mashreq region differ significantly even with each other in the reform process, commitment to EU partnership or perceptions of EU assistance.

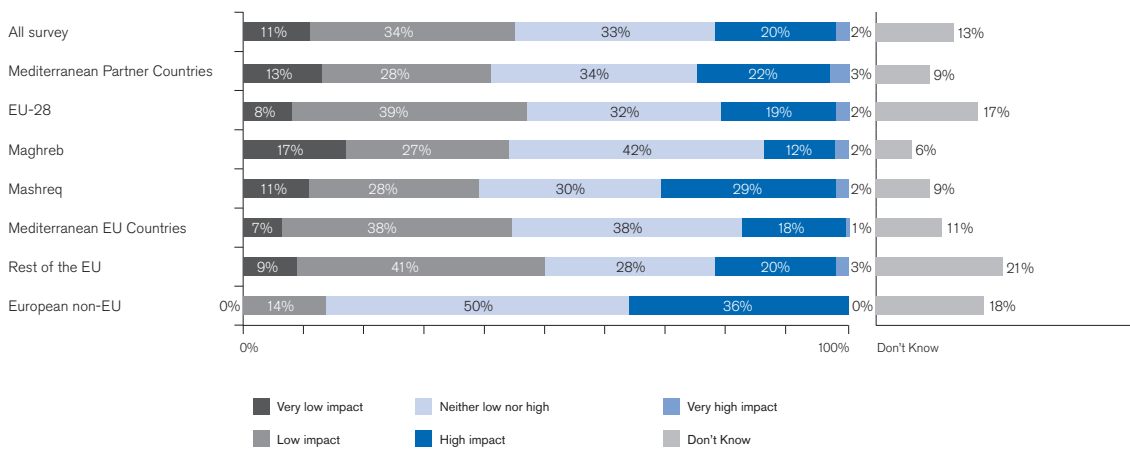
To qualify the findings of question D3 to an extent, it should be kept in mind that certain ENP measures which respondents were asked to assess are not yet or have only recently been implemented. One of these measures is the Deep and Comprehensive Free Trade Agreement (DCFTA). It needs to be stressed that so far no DCFTAs have been signed with partner countries in the southern neighbourhood, and negotiations are only being held with Morocco and, hopefully soon, Tunisia. Similarly, declarations on mobility partnerships have been signed

solely with Morocco in 2013 and with Tunisia in 2014. Therefore, it is understandable that misperceptions exist on the ground as to the effectiveness of these policy measures.

Within the framework of question D3, the Support for Partnership, Reform, and Inclusive Growth (SPRING) programme has generally been assessed as having low effectiveness. Indeed, the financial amounts handled under the more for more programmes, such as SPRING, might not be very significant given the partner countries' economic size and performance. Regardless, the division between partner states receiving and those not receiving allocations under SPRING does send a strong political signal to the southern neighbourhood, and partner countries recognise the added value that the award of this programme entails. In line with the more for more principle, SPRING provides incentives to partner countries to step up their political reform plans, by offering additional financial assistance in return.

**In line with the more for more principle, SPRING incites partner countries to undertake political reforms, by offering additional financial assistance.**

**Graph 1: Assessing the the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries: Support for Partnership, Reform and Inclusive Growth (SPRING)**



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

In conclusion, it is still too early to ultimately judge the impacts of certain measures under the revamped ENP following the Arab awakening of 2011, as their effects still have to unfold. At the same time, the EU can only grant very limited meaningful support to southern neighbourhood countries, as long as local governments do not put reforms in place and show political willingness to commit to a partnership with the EU. Regardless of these limitations, in order to create more attractive incentives for political transition in the southern neighbourhood there is only one promising approach: political coordination among European actors in the southern neighbourhood needs to be stepped up, and joint programming on the EU level between EU Member States, EU institutions and European financial institutions must become a priority. These cooperation exercises could also include other important actors in the Middle East, such as Arab states and donors.

**As long as local governments do not show their commitment to partnership with the EU, EU support will remain limited.**

The EU has already taken the first steps in this direction. I am convinced that EU assistance can promise vigorous effects if it forms part of coordinated approaches, is implemented in genuine partnership and plays an instrumental role for the whole European Neighbourhood Policy approach.

# TOWARDS A SHARED MEDITERRANEAN AGENDA

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**FATHALLAH SIJILMASSI**

Secretary General of the Union for the Mediterranean

**The Survey reveals the existence of a shared Euro-Mediterranean agenda, built on common interests and concerns**

According to the results of the 5<sup>th</sup> Euromed Survey, experts from both Northern and Southern Mediterranean countries appear to share the degree of importance they attribute to projects of regional cooperation in the Mediterranean. This signals the existence of a shared Euro-Mediterranean agenda, that is, an agreed set of issues to which all countries attach a similar high degree of importance.

This should be of high significance to all those striving for more operational cooperation in the Mediterranean. It entails that an Euro-Mediterranean agenda can build on shared interests and concerns: a) the actual existence of a series of challenges to which both Northern and Southern countries are confronted – for instance, inclusive growth and job creation, as well as youth unemployment; b) a shared understanding on the driving-change role that socio-economic actors like women and youth, but also small and medium enterprises, are to play; c) a shared geo-political understanding of the need to tackle major challenges – such as sustainable development, water, environment or energy – by adopting a regional approach drawing on North-South partnerships.

**The Survey shows the higher degree of priority attached to projects directly tackling major socio-economic concerns**

The resumption of UfM Ministerial meetings – 5 UfM ministerial conferences have been held since 2013 – as well as the acceleration of the UfM pipeline of projects and initiatives gives full evidence of this shared conviction by UfM member states of the need to accelerate regional cooperation under the impulse of the UfM Co-presidency, EU and Jordan, in fields such as transport, urban development, energy, women empowerment, private sector development and job creation, environment and climate change, and higher education and research. This current positive momentum not only showcases the shared commitment of all countries and stakeholders in the region to work on shared key topics and challenges, it also points to the existence of a broad field of opportunities in Euro-Mediterranean cooperation paving the way for concrete and effective cooperation in a growing number of sectors.

As shown in the Survey by the higher degree of priority attached to projects directly tackling major socio-economic concerns such as unemployment, or to those dealing with governance matters on highly sensitive issues such as water, the strengthening of the human dimension of the UfM activities encouraged by member states has allowed the Barcelona Secretariat to be a useful tool in light of the recent economic and political transformations both in the region.

**Infrastructure flagship projects continue to be considered as key for the future of the region.**

Meanwhile, large infrastructure projects, such as “the Desalination Facility for the Gaza Strip”, the “Trans-Maghreb Motorway Axis” or “The Euro-Mediterranean University of Fes” remain flagship projects with a highly symbolic significance and continue to be considered as key for the future of the region. In addition, the relatively higher degree of priority that experts from Southern Mediterranean countries attach to infrastructure projects renders the goal of economic regional integration, all the more necessary in light of the still very low levels of intra-regional trade between countries in the South, at the forefront of the UfM agenda.

The results of this Survey are thus consistent with the major challenges facing the region and provide a forceful incentive to step up our efforts to contribute to a more economically integrated Mediterranean. Indeed, regional integration constitutes the overarching horizontal objective of all UfM activities, both as a long-term driver for political stability in the South and for economic competitiveness in the North, as well as, let's not forget it, a suitable way to deal with great challenges and opportunities in Sub-Saharan Africa.

The UfM Secretariat's result-oriented approach, as well as its capacity to operationalize within ad hoc variable geometry frameworks the political decisions taken by member states, ensures that UfM regional activities are fully in line with member states' shared priorities and national interests.

**The Survey results provide a forceful incentive to step up the UfM efforts to contribute to a more economically integrated Mediterranean**

# THE EU'S VANISHING IMPACT AND VISIBILITY IN THE MEDITERRANEAN

**POL MORILLAS**

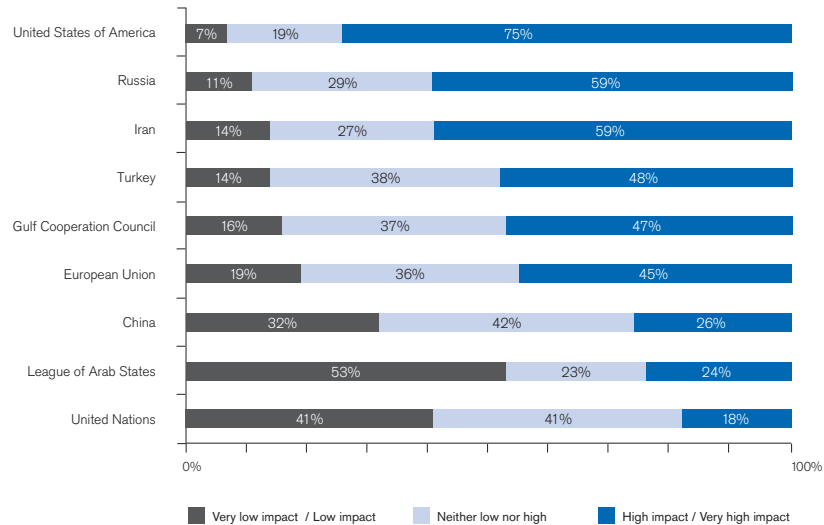
Head of the Euro-Mediterranean Policies Department, IEMed

**Despite a dense network of cooperation with its Mediterranean Partner Countries (MPCs), the EU drags behind other external actors of the Mediterranean region.**

The EU does quite a lot in its southern neighbourhood but receives little credit for it. This could be the headline of the results of the 5th Euromed Survey, which reveals that the EU's visibility and impact in the Mediterranean has eroded in recent years. Taking the Survey as a whole, the EU scores low compared to other external actors of the Mediterranean region, despite a dense network of cooperation with its Mediterranean Partner Countries (MPCs) dating back to at least 1995.

An optimist would highlight that the EU has a similar level of impact compared to the actor attracting most attention lately: the Gulf. They both score around 45% of high or very high impact in the region. But a less optimistic view would note that, despite its intense level of political, economic and social engagement, the EU still drags behind actors such as Russia (59% of responses signalling a high impact of its policies) or Iran (59% as well), with less comprehensive relations with MPCs (see graph 1).

**Graph 1: Assessing the impact of the following international players in the Southern Mediterranean countries** (ordered by % of "Very high priority" answers)



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

Russian, Iranian and, to an extent, US influence in the region might reflect the centrality of the Syrian conflict in the geopolitics of the region. But one cannot forget that the EU still has a lot of room to increase the impact and visibility of its policies. In broad terms, one can argue that the EU scores low when it comes to political action, but high when its policies are assessed.

On the politics side, the Survey shows that the capacity of the EU to act as a peace broker is perceived as low (only 25% of the responses acknowledge that the EU can become an influential mediator and peace broker in the region). In contrast, on the policies side, the EU's influence as a major trading and economic partner for MPCs and as a driver of the rule of law and governance reform receive higher rates (67% and 39%, respectively).

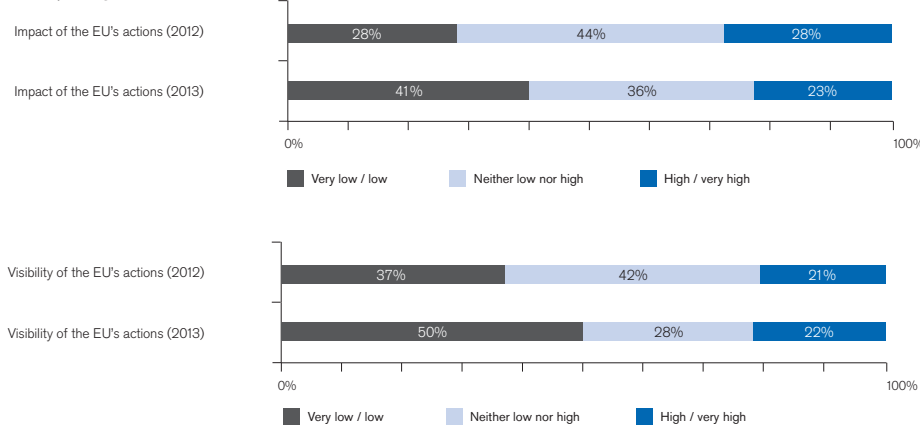
**The EU still has a lot of room to increase the impact and visibility of its policies.**

In other words, these figures reveal that, despite the remarkable efforts of the EU High Representative Catherine Ashton and the European External Action Service (mostly through Bernardino León, Special Representative for the Mediterranean Region) to act as a decisive political mediator in countries such as Egypt, the EU is still most valued for its policy action, embodied in the European Neighbourhood Policy (ENP). These policies have less chance to attract the headlines than mediation efforts. And this probably explains why the impact assessment of the EU's actions in the region, as can be seen in graph 2, has suffered a slight downturn in recent years (41% of very low impact in 2013), while there is also a negative assessment of the visibility of the EU (50% of respondents consider the EU's action to have a low visibility).

**Despite efforts to act as a decisive political mediator, the EU is still most valued for its policy action, embodied in the European Neighbourhood Policy.**

**Graph 2: Assessing the impact of the EU's actions in Mediterranean Partner Countries**

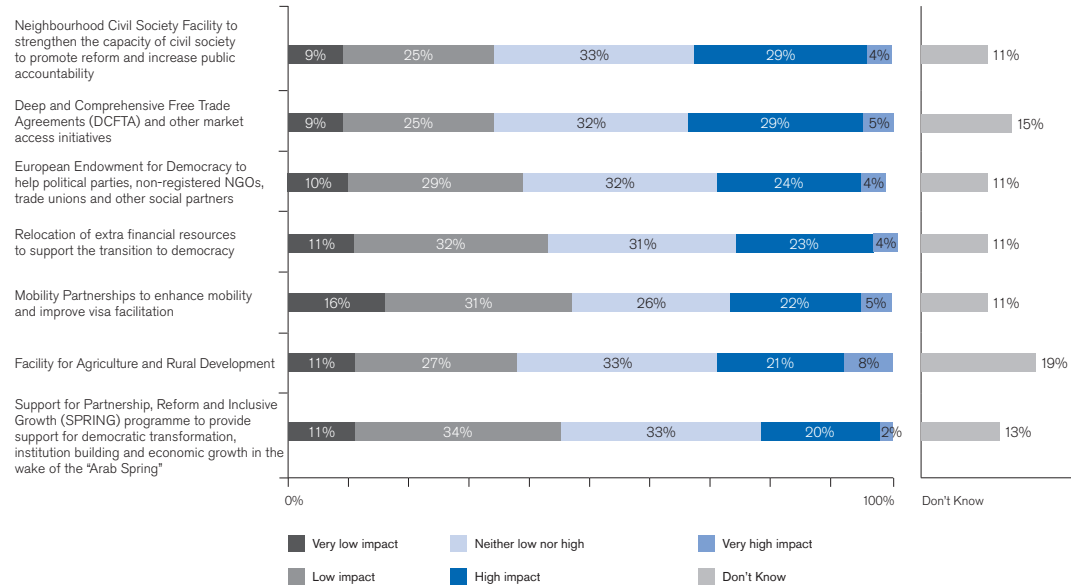
(comparing 2012 and 2013 results)



Source: Compiled by the IEMed based on the results of the 4th and 5th Euromed Survey

However, the data provided by the Survey also shows that there is a generally positive perception of the EU's policies in the Mediterranean (see graph 3), particularly the ENP. In addition to the broad assessment of the role of the EU as a trading partner and driver of political reform, the Survey reveals that the ENP measures with the greatest impact are the Civil Society Facility and the Deep and Comprehensive Free Trade Agreements (both with 35% of responses considering that their impact on MPCs is high or very high). At the other end, the Mobility Partnerships and the SPRING Programme are considered to have a lower level of impact (with 47% and 45% of responses arguing that their impact is low or very low, respectively).

**Graph 3: Assessing the the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries**



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

**The coordination between the European Commission, EEAS and EU Member States and a stronger focus on policy actions are the chief measures to increase the EU impact and visibility.**

Overall, the data presented in the Survey indicates that the EU needs to recalibrate its efforts in the Southern Mediterranean in order to increase its impact and visibility. Chief among these measures will be the coordination of the different set of policies of the EU, including the ENP, but also the projects of the Union for the Mediterranean, those of EU Member States and the political action of the EEAS.

Towards the end of 2014, the EU will be equipped with a new set of personalities at the top of its policy-making bodies. The new EU High Representative and European Commissioner for Neighbourhood Policy will be in charge of upgrading the set of tools to promote democratic reform in the Southern Mediterranean. On the one hand, the coordination between the EEAS, the European Commission and EU Member States will be of paramount importance. On the other, a stronger focus on policy actions – rather than extenuating efforts towards obtaining high-profile political results – might also be a path worth pursuing.

# MIGRATION AND MOBILITY

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## XAVIER ARAGALL

Euro-Mediterranean Policies Technical Advisor, European Institute of the Mediterranean

In terms of migration, during the Euromed Survey fieldwork the debate in Europe focused on its management faced with the constant arrival of irregular migrants to eastern, central and western areas of the Euro-Mediterranean border.

This situation, mainly resulting from the flare-up of the war in Syria and the destabilisation of Libya, has brought about an increase in migration flows from Sub-Saharan Africa, which overlap with refugees fleeing war, whether in Syria or African countries such as Somalia or Eritrea.

In late 2013 the Task Force Mediterranean (TFM) was established for short-term prevention of further deaths by drowning of people trying to reach Europe through the island of Lampedusa, strengthening the FRONTEX actions in the area. In the long term, the replacement of the Stockholm Programme (2010-2014) must set the guideline for the migration and mobility strategy. Under the name “An open and secure Europe: making it happen”, the European Commission has started working on this new programme. This document advocates continuity and enhancing cooperation with neighbouring countries and particularly fostering the implementation of the Mobility Partnerships.

In this framework, it is important to note that in the results of the previous surveys migration has always been present in three of the main future scenarios capable of influencing the reality of the region. Thus, respondents considered migration to be even more determining for the Euro-Mediterranean area than the ongoing open conflict between Palestine and Israel, or equally as relevant as the feared water scarcity conflicts.

Moreover, it should be added that the current management of the migration flows has an effect both on the northern and southern Mediterranean and the origin of most flows lies outside the neighbouring area, obliging a re-approach to its dimension beyond the framework established by the current European Neighbourhood Policy (ENP) and broadening the geographic concept of neighbourhood.

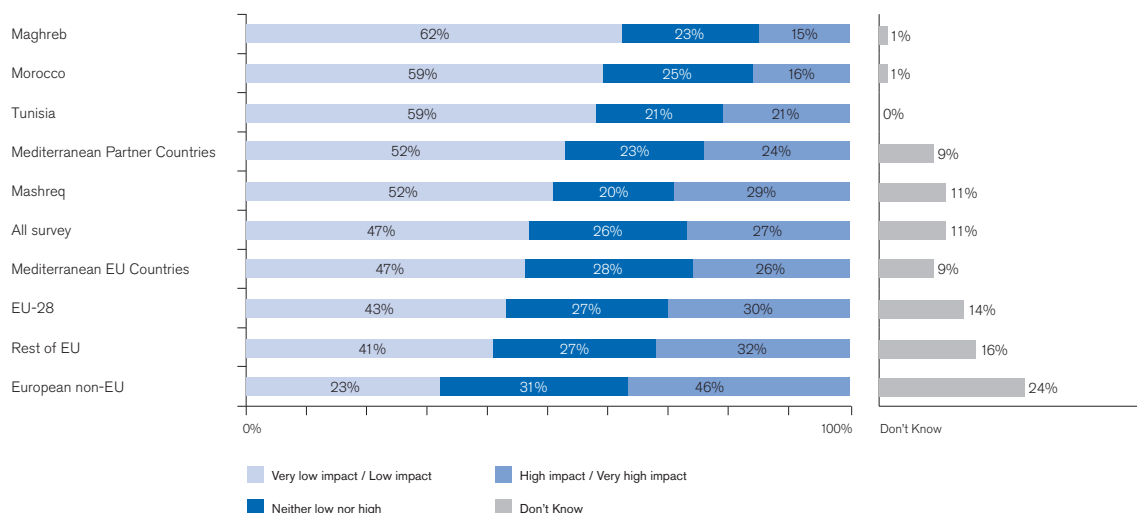
The results of the Survey on the Mobility Partnerships (the ENP programme to foster organised migration) follow this trend. In fact, as can be seen in graph 1, the assessment of its impact is more negative in southern than in northern countries, exceeding 50% of negative or very negative assessments (62% for the Maghreb and 52% for the Mashreq). It is especially relevant to observe this result for the Maghreb, given that the only two Mobility Partnerships signed until now have been with Morocco and Tunisia. Graph 1 also breaks down this result for the two respective countries and shows how the degree of knowledge about the programmes is considerably above the sample average. Moreover, they are assessed more negatively than the Survey and Mediterranean Partner Countries (MPC) averages.

Consequently, if greater knowledge of the Mobility Partnerships results in a more negative assessment and there is a differential in the assessment between the north and the south, one should wonder whether, now that the next multiannual migration programme is being planned, it is necessary to revise this measure, distancing it from a conception too focused on the EU's interest and try to further Mediterraneanise this strategy of organised migration.

**In the previous surveys, migration was considered to be more determining for the Euro-Mediterranean region than the conflict between Palestine and Israel.**

**Mobility Partnerships should be revised and distanced from its conception too focused on the EU's interest and further Mediterraneanised.**

**Graph 1: Assessing the impact of the European Neighbourhood Policy (ENP) measures on the Southern Mediterranean countries: Mobility Partnerships to enhance mobility and improve visa facilitation**

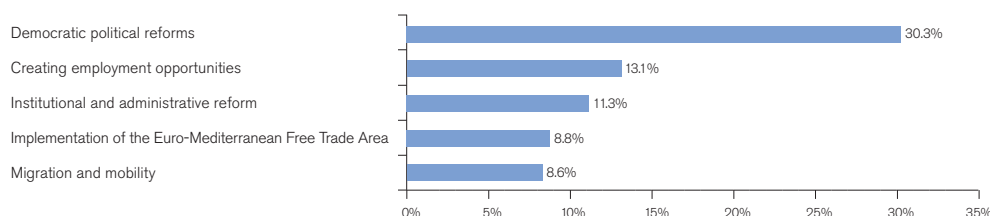


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

Although in the long term migration management is seen as something that determines the future of relations in the Euro-Mediterranean area, its management, translated into EU policies in the short term, is not considered such a priority. The Survey reveals that, although migration and mobility enter the top 5 priorities (see graph 2), this list is headed by policies related to democratisation and creation of employment.

**Although in the long term migration management is seen as determining for the future Euro-Mediterranean relations, in the short term it is not considered by the EU such a priority**

**Graph 2: EU's policies in the near future for the region: selecting policy areas according to its priority (5 areas considered to be 1st priority)**



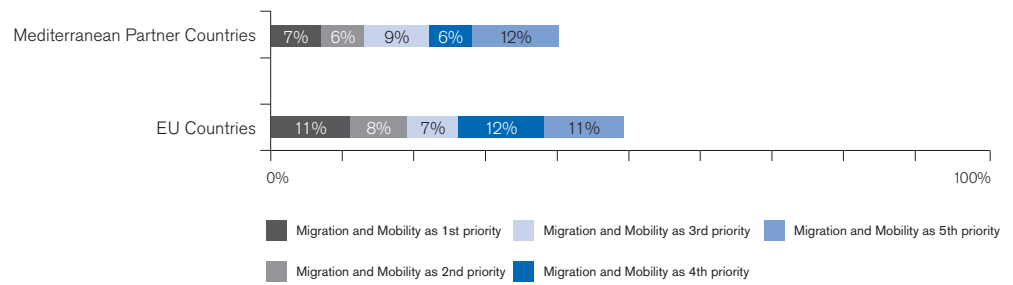
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

However, a detailed analysis of the results shows that in the responses from the EU, migration is the third priority, while in responses from the MPCs it occupies fifth position at a notable distance from the fourth.

**EU respondents consider migration to be the third priority, while respondents from the Southern Mediterranean region rank it in fifth position.**

The cumulative percentage reflects a different ranking. Thus, for the MPCs the percentage of people who place migration and mobility in the 5 top priorities amounts to 40% while in EU countries it is 49%.

**Graph 3: EU's policies in the near future for the region: selecting Migration and mobility policies according to its priority** (cumulated % of responses choosing the priority of migration policies from first to fifth place, out of 11 policy options)



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

**The greater prioritisation from EU countries indicate that the implementation of an organised migration management is thought necessary, as it is the best measure to regulate irregular immigration.**

This greater prioritisation from EU countries can indicate that the Survey's respondents consider it necessary to implement an organised scheme of migration management which, in the end, is the best preventive measure to regulate irregular immigration.

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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.

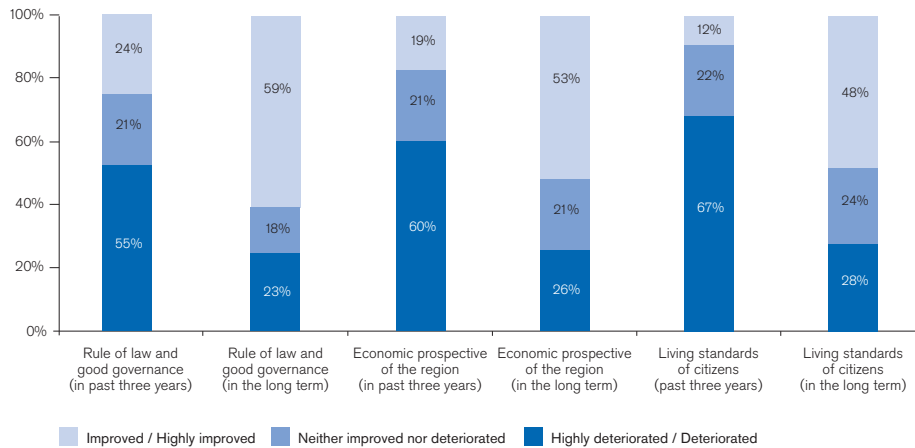
The first block of the Survey aims to take the pulse of the changes in governance and in the socioeconomic policies of the Southern Mediterranean countries by asking about their past and future. In this block there are also questions about the impact of the international actors in the region as well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



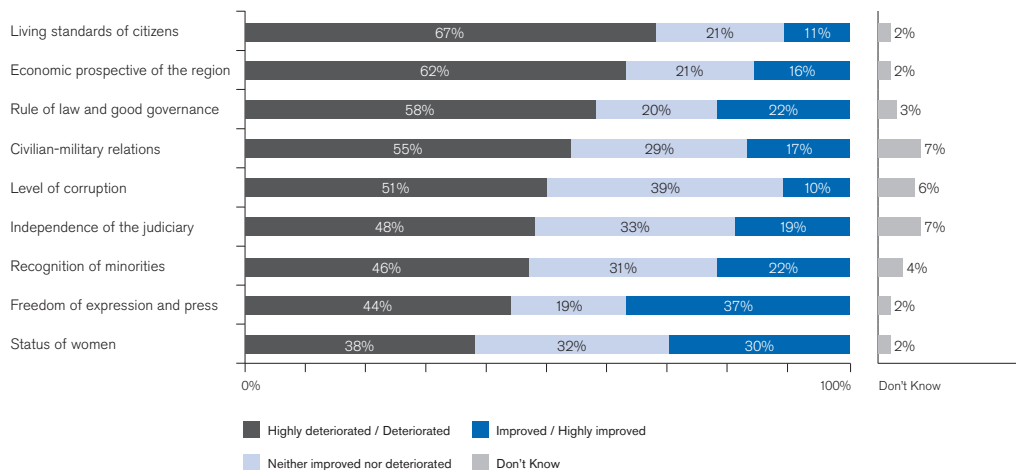
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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**



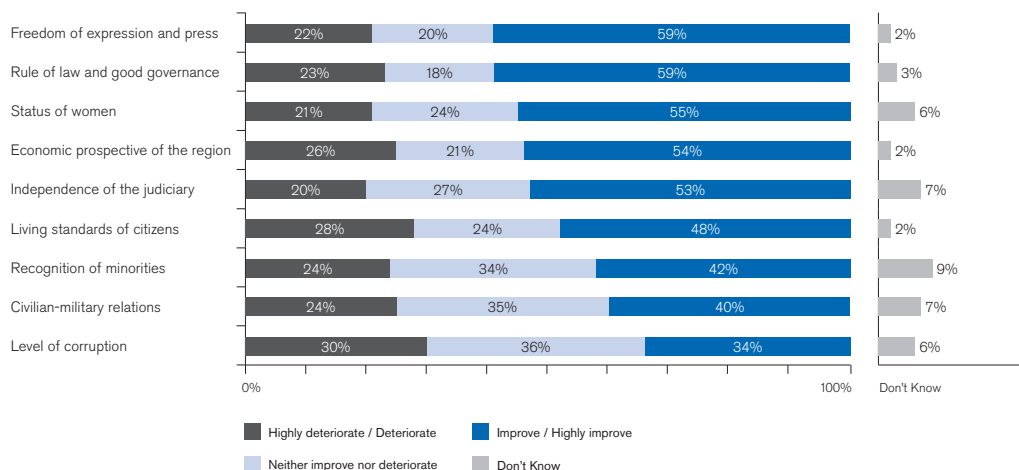
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

## 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.

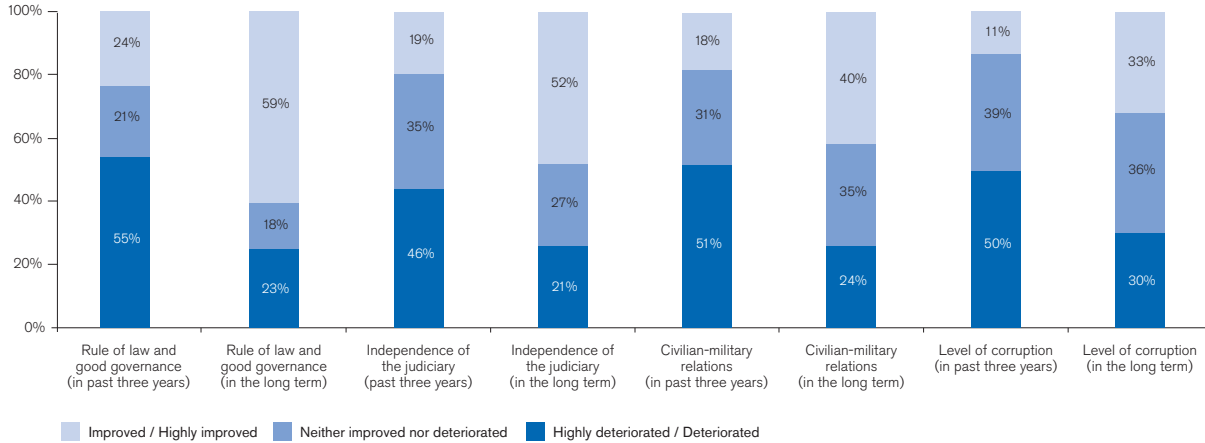
It is notable that the four fields of governance<sup>1</sup> have evolved quite negatively, with over 50% (except for independence of the judiciary with 48%) of responses assessing it as highly deteriorated/deteriorated. The forward-looking analysis is more heterogeneous but its common strand is a positive 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**

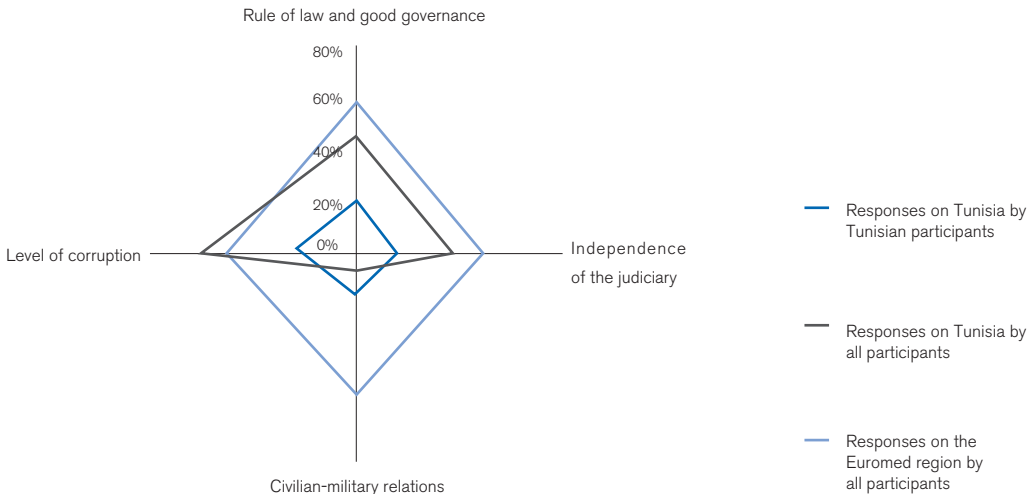


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**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)



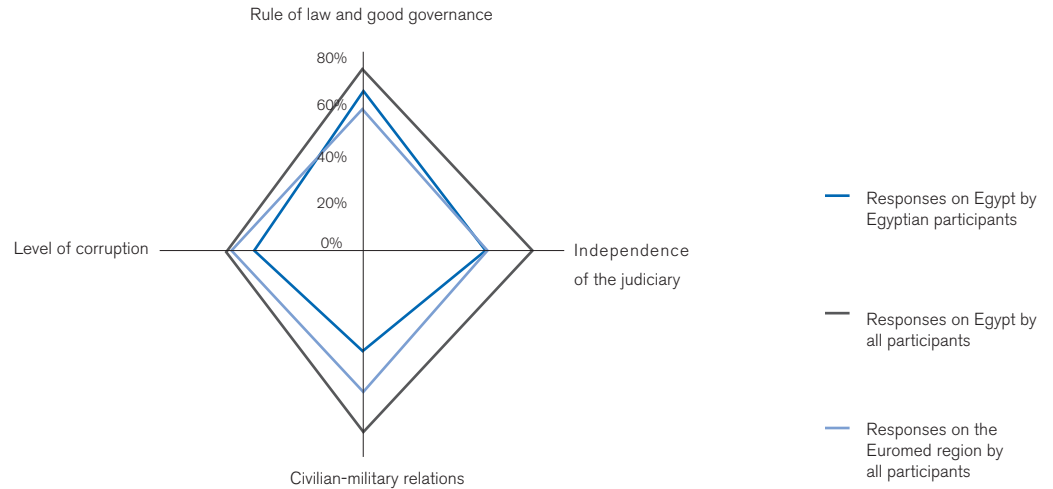
**The overall opinion about the changes in Tunisia in the last three years is quite positive.**

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)

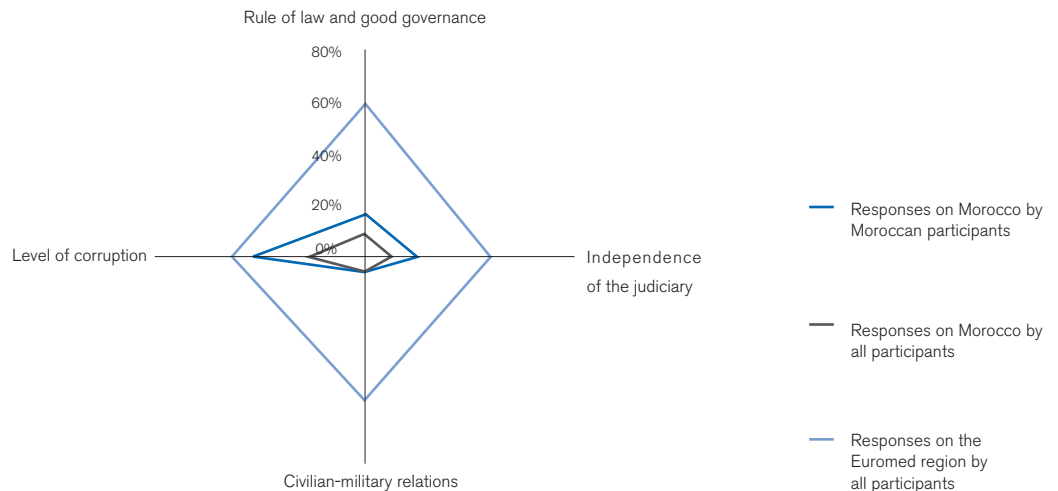


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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

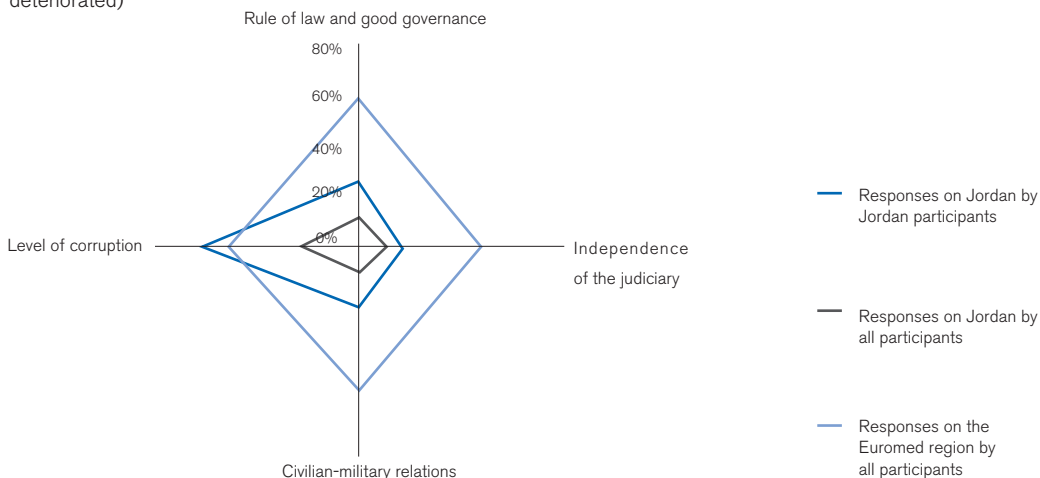
Focusing the analysis on countries that have undertaken political reforms in the context of regional changes, anticipating potential citizen demands and mobilisations, we see in the case of Morocco and Jordan a similar pattern to that of Tunisia; that is, the country is assessed less negatively than 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)

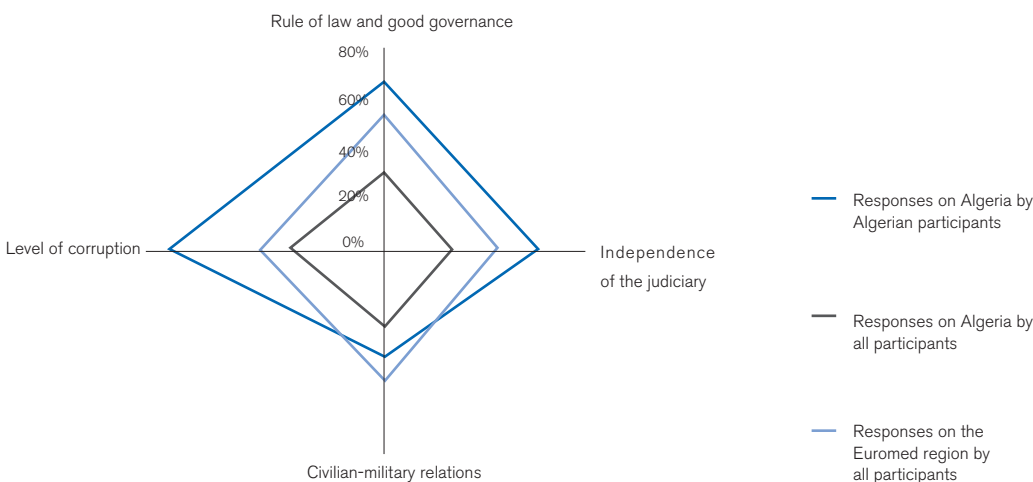


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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)

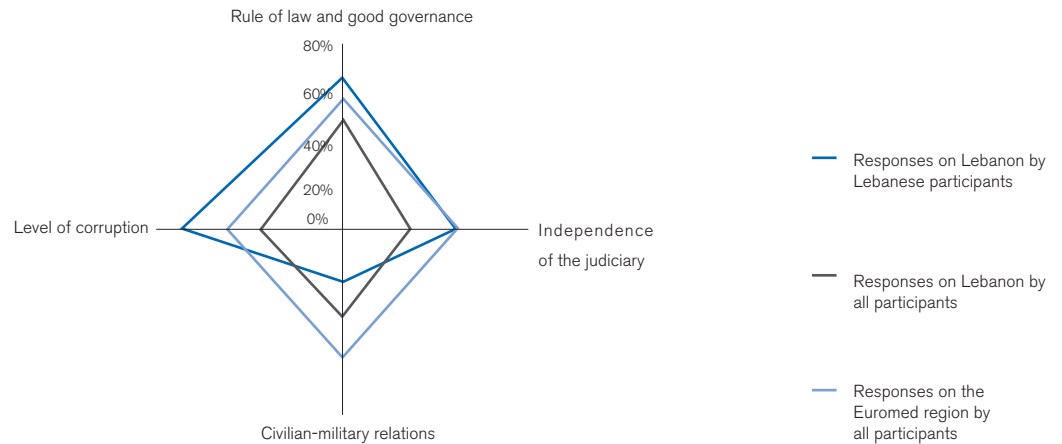


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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

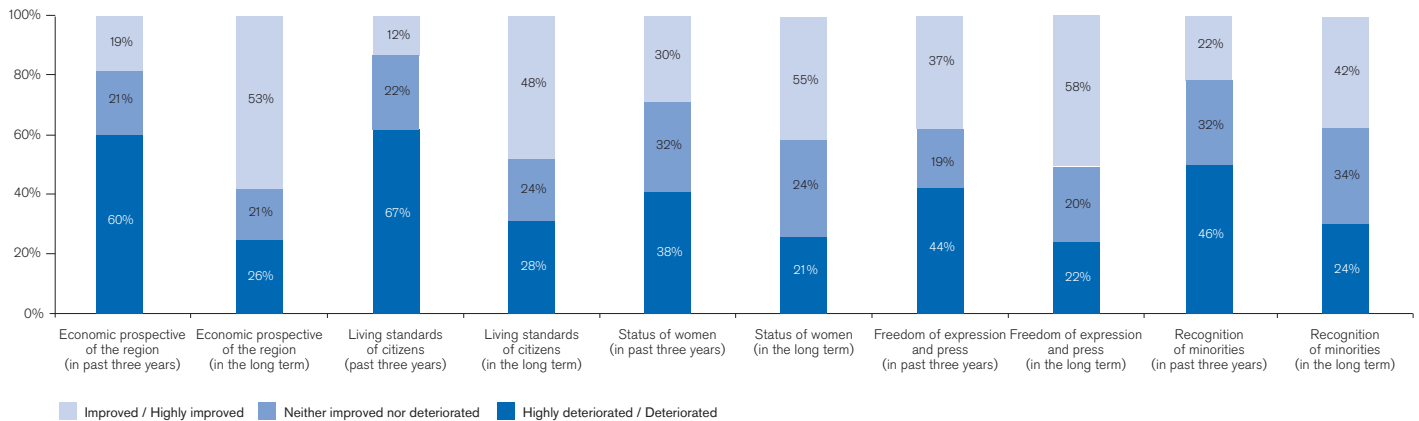
**Assessing socioeconomic changes in the last three years**

**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

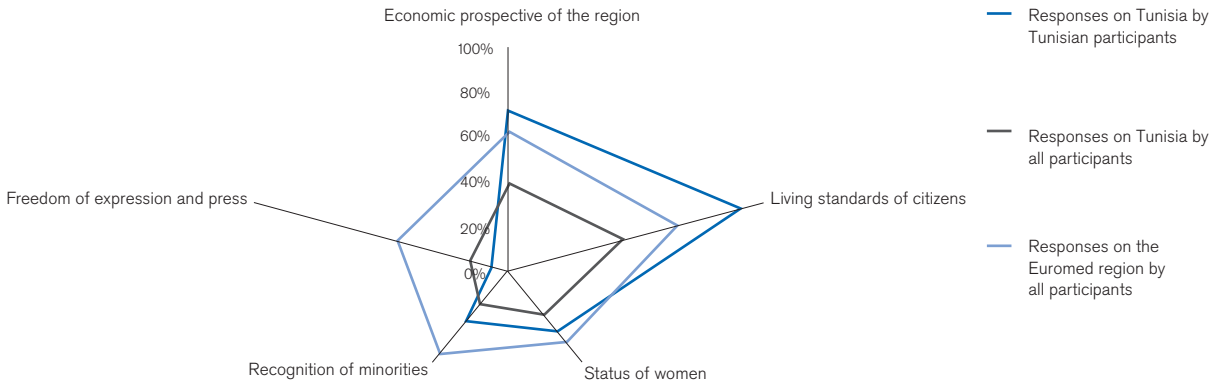
few years. Moreover, responses for the long term are among the most positive in the Survey; in both cases over 50% of respondents consider that it will improve over the next few years. Despite following the same trend, the result for the recognition of minorities is more nuanced. A higher percentage 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).

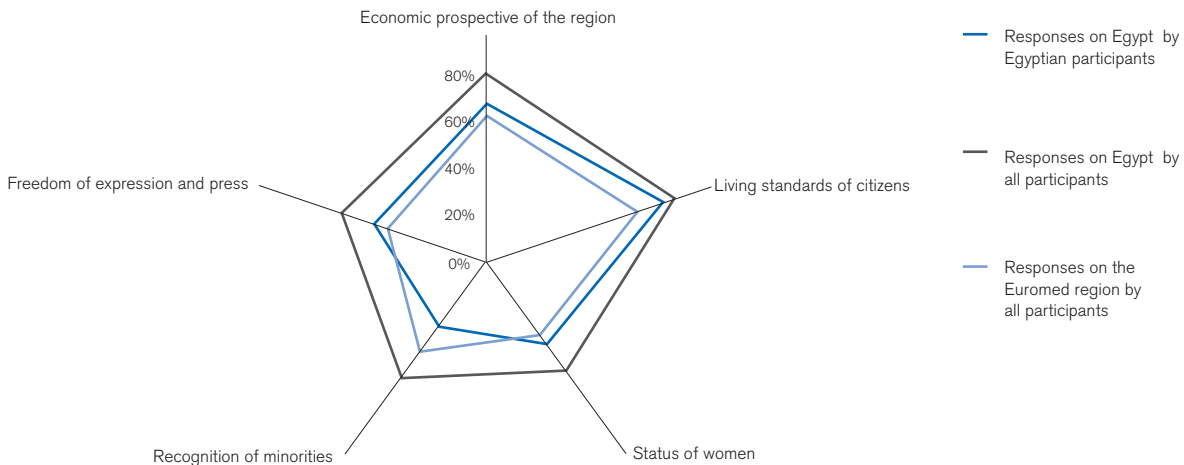
**Most respondents consider that in Tunisia civil rights and liberties have improved, while in Egypt they have significantly deteriorated.**

**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)

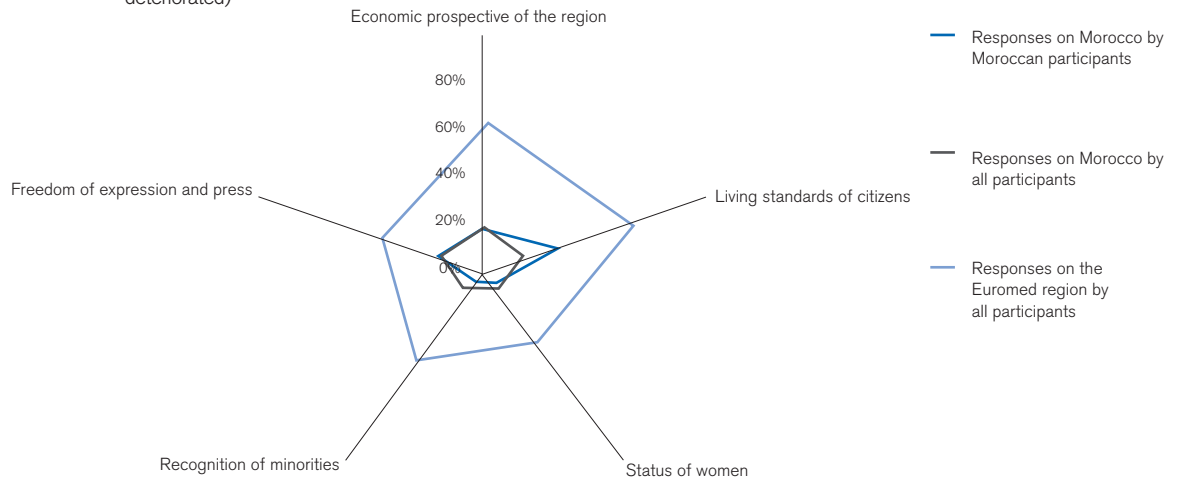


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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

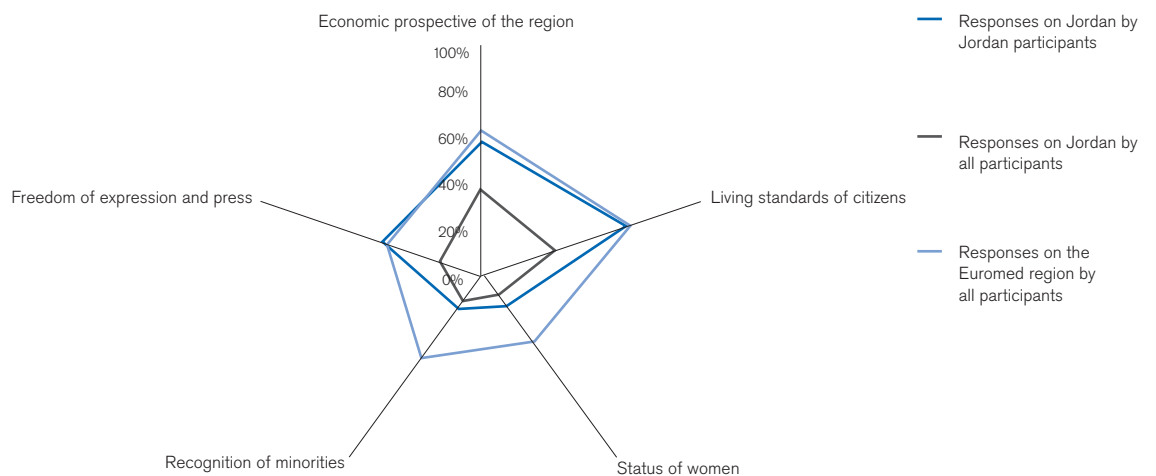
For the countries that have undertaken reforms over these three years, no clear comparison can be established. For example, the results of Morocco and Jordan reflect a disparate economic situation, considerably below the regional average in Morocco and in keeping with the regional trend in Jordan. In 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

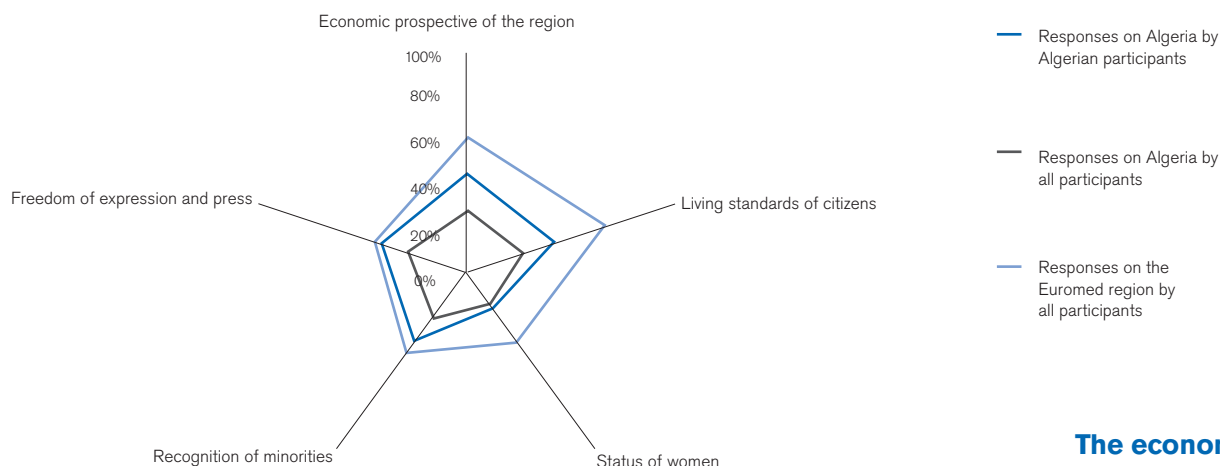
**Graph 15.4: Comparing the improvement or deterioration in the past three years on socioeconomic elements: Euromed region and Jordan** (% of answers considering that the following elements have deteriorated or highly deteriorated)



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)

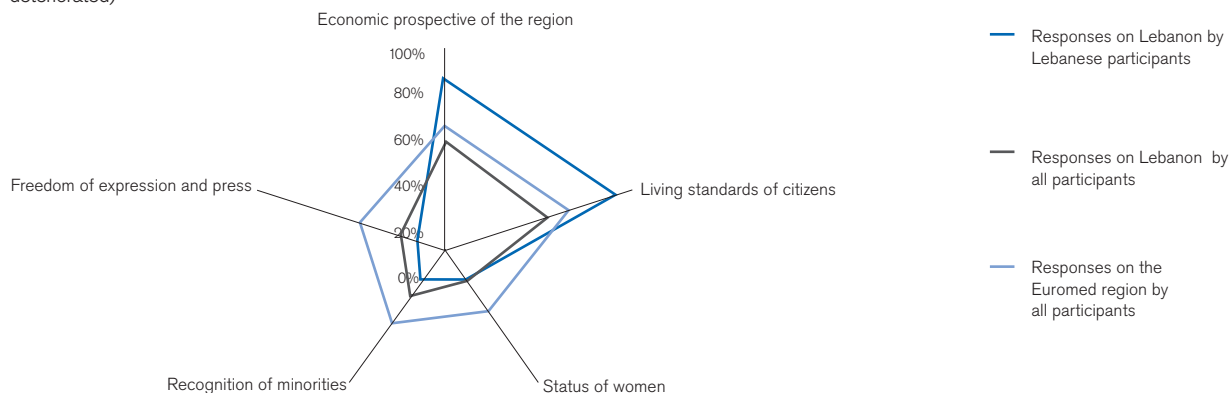


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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)



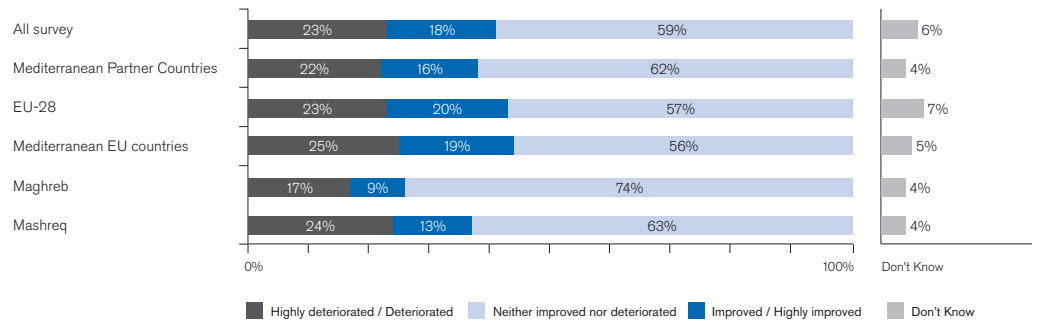
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

**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:**

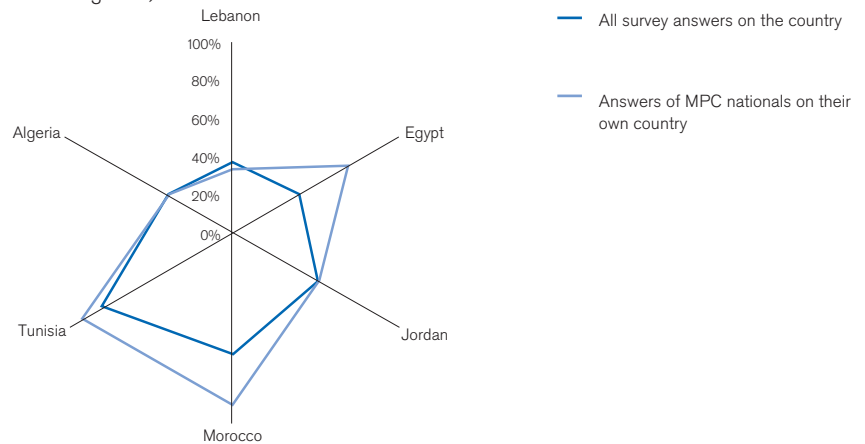


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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

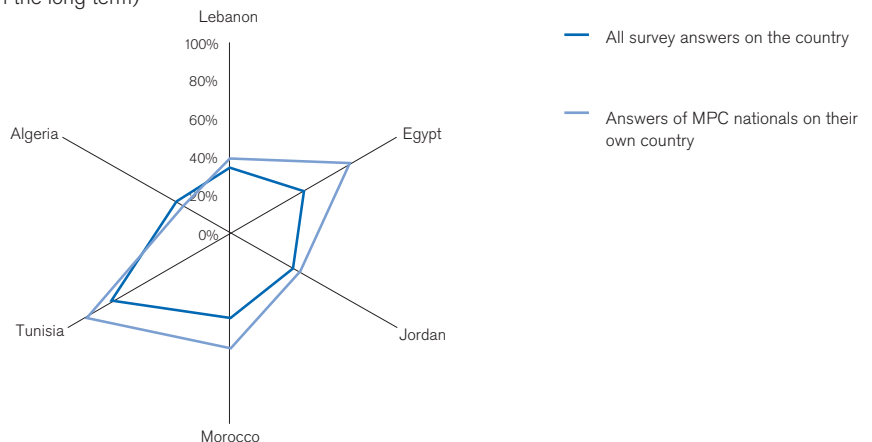
However, the results by country allow us to see a less solid optimism for countries such as Algeria, Jordan or Lebanon. Moreover, it is notable to see how the results of Tunisia, Morocco and Egypt significantly indicate improvement of these key points for governance, and the fact that opinions differ 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)



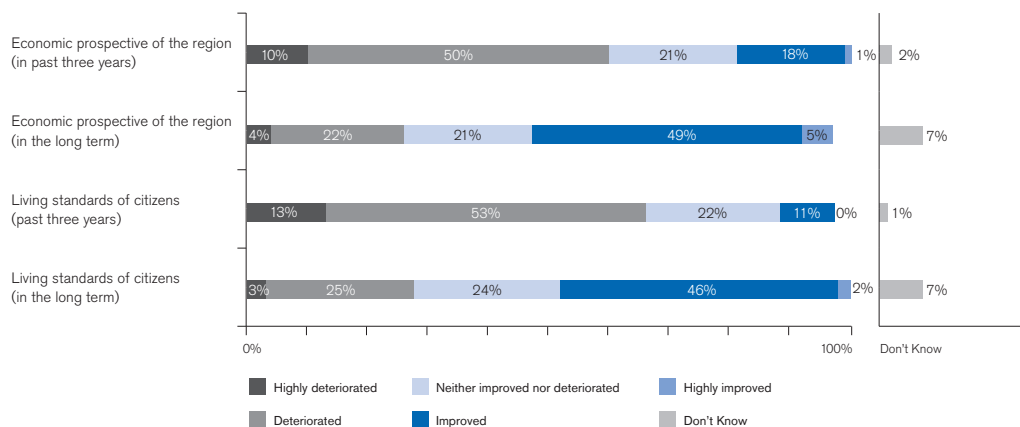
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

## 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

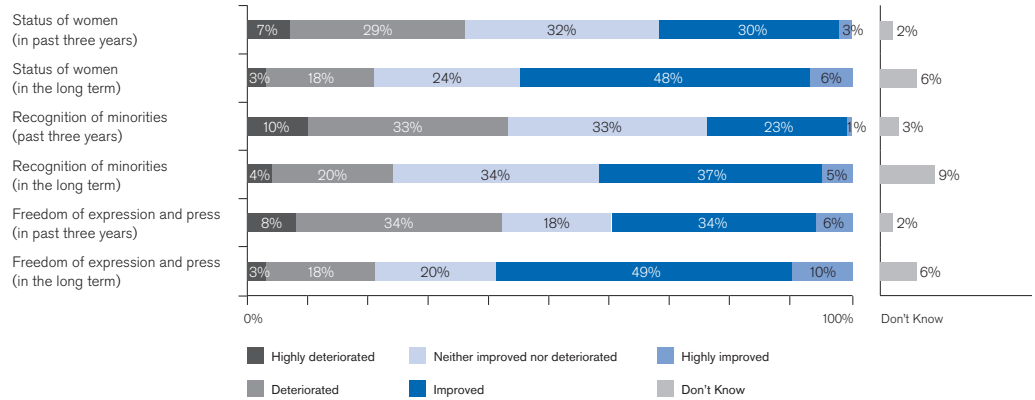
## Optimism about the prospects for rights and liberties

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**

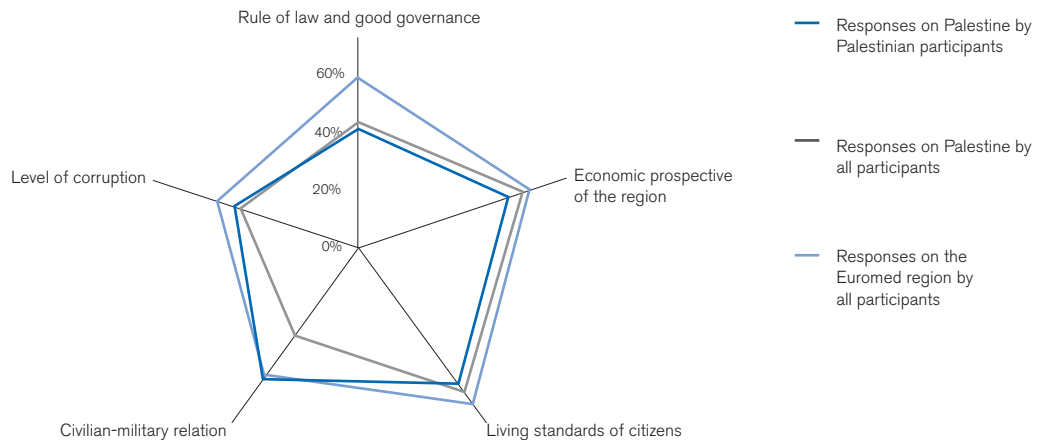
**Forward-looking assessment of Palestinians of the rule of law and governance and civilian-military relations in Palestine is much more positive than the opinion of the rest of respondents.**

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.

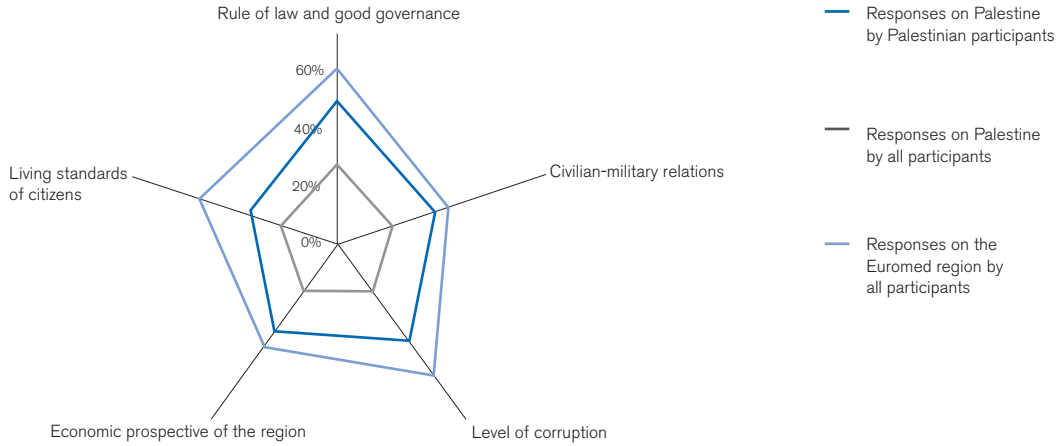
**Graph 20.1: Occupied Palestinian Territories** (% of answers considering that the following elements have deteriorated or highly deteriorated in the last three years)



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)



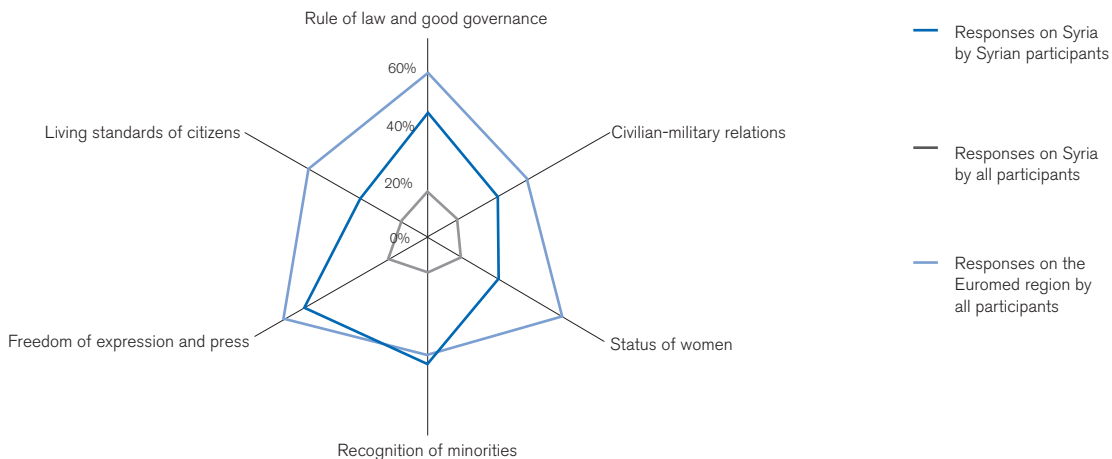
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### 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.

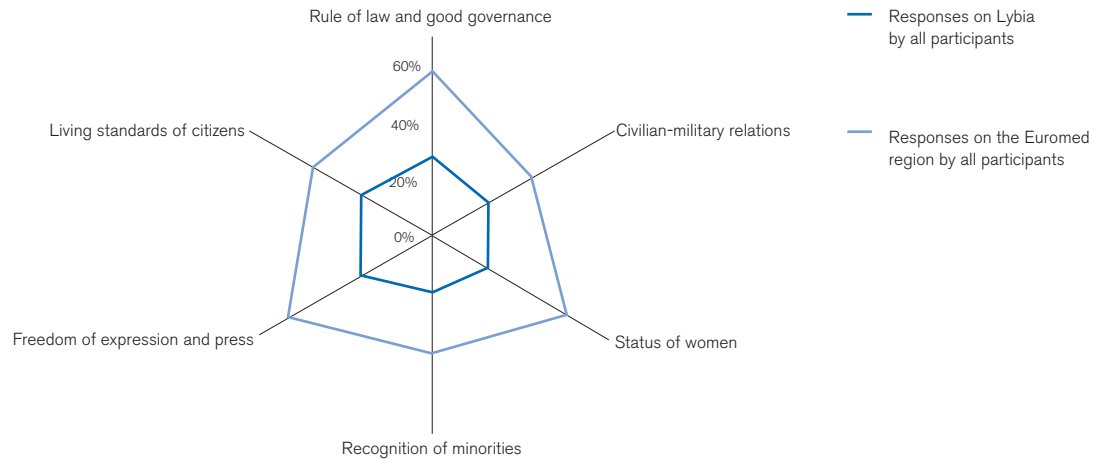
**Graph 19: Syria** (% of answers considering that the following elements will improve or highly improve in the long term)



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

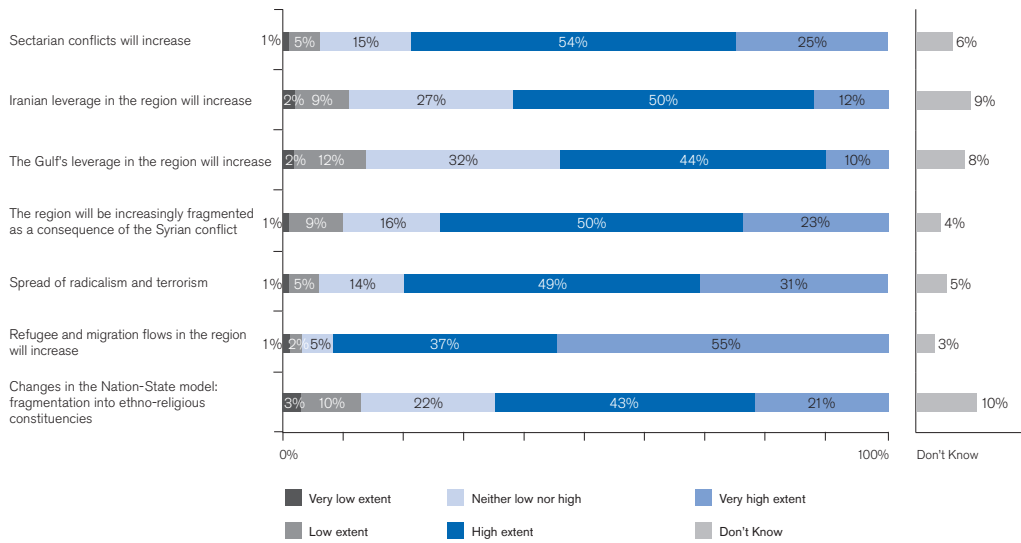
### Main findings

- 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**

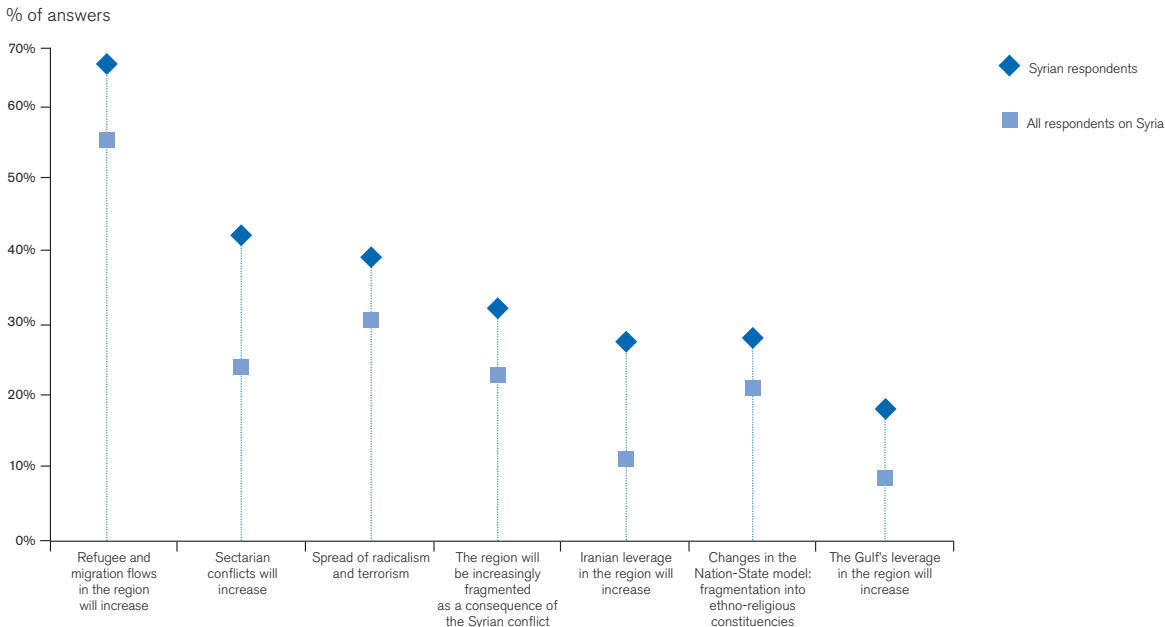


Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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)**



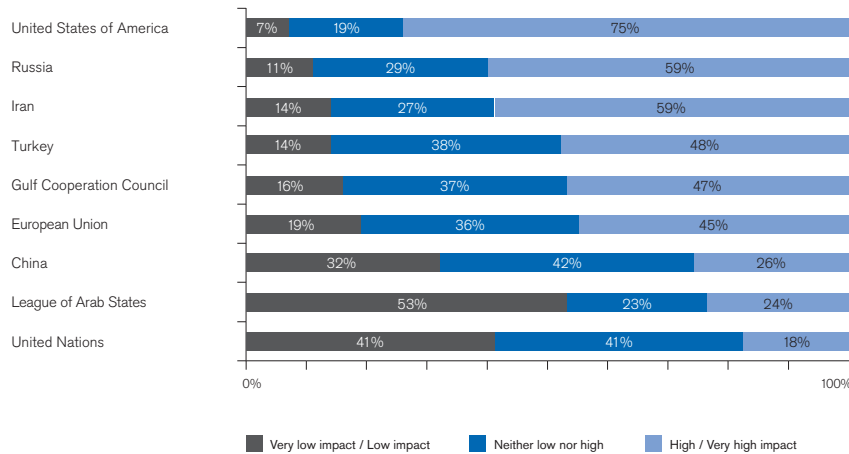
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

### 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.

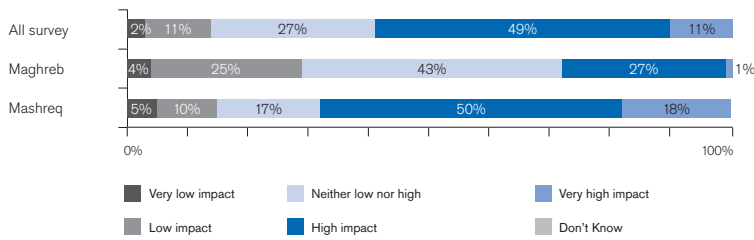
Belgian respondent

**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.

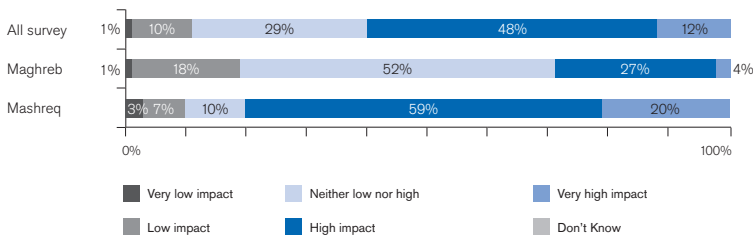
While the rest of the groups of countries have results very much in line with the Survey average, the results for the Maghreb and Mashreq show notable variations, as can be seen in graphs 22 and 23, which show that both actors are seen as more relevant in the Mashreq.

**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**



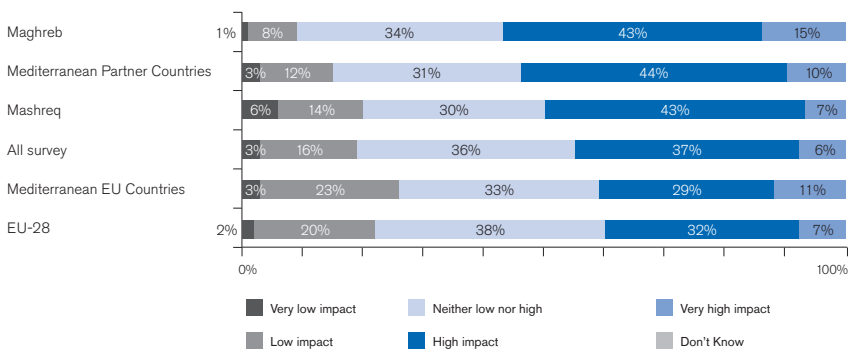
Source: Compiled by the IEMed based on the results of the 5th Euromed Survey

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.

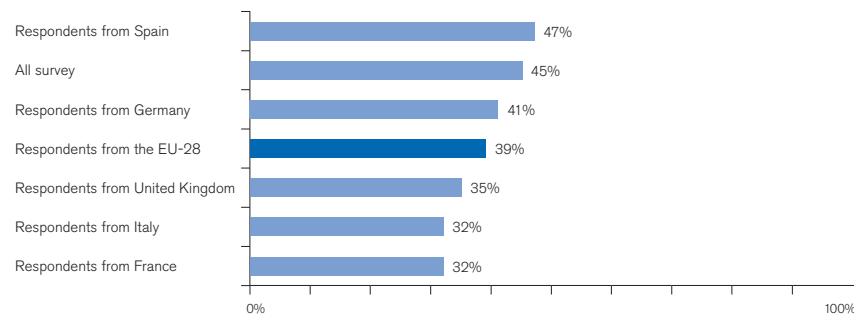
Maltese respondent

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

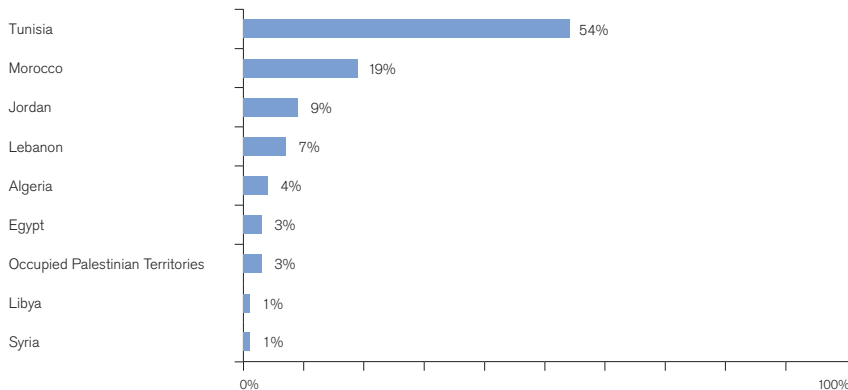
We are not talking about the Western type of democracy but the one adapted to local conditions and social fabric.

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.

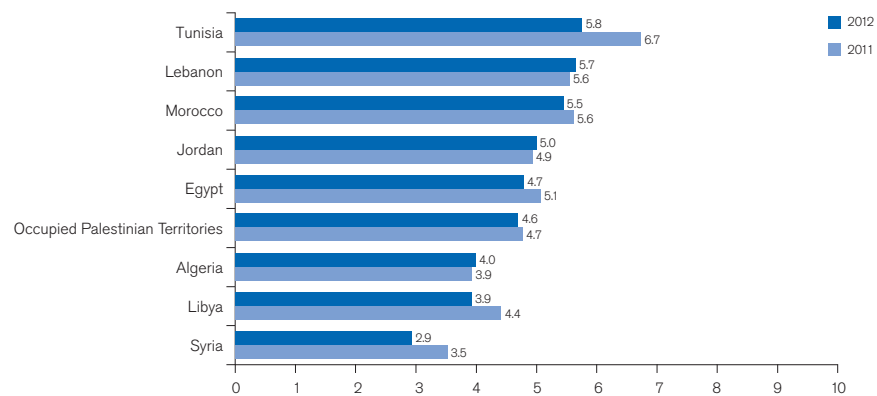
It is notable that every country has its own perception of what a democratic regime should be. Political awareness and maturity in all these countries varies and is highly related to the social, education and economic strata that the respective citizen belongs to.

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.

# POSITION OF THE EU IN THE SOUTHERN MEDITERRANEAN REGION

### Main findings

- Most respondents consider that the EU has a high or very high influence in the MPCs as an economic and trading partner.
- The influence of the EU as a mediator and peace broker is assessed as low or very low by most respondents.
- Out of the international actors present in the region, only the USA and, to a lesser extent, the GCC are considered more influential than the EU.
- In comparison to the 2011 Survey, the importance of the role of the League of Arab States and, significantly, also of Turkey has decreased.

**Most respondents consider that the EU has high or very high influence in the Southern Mediterranean region as an economic and trading partner.**

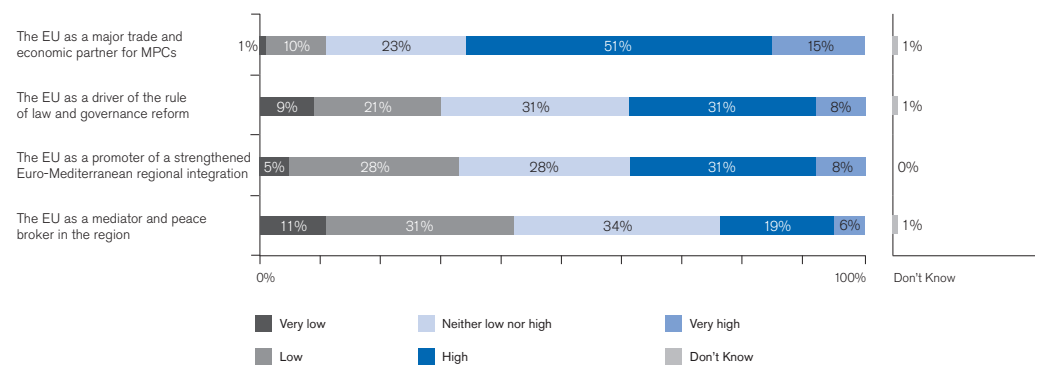
This block aims to assess the future role of the European Union regarding the development of a multipolar neighbourhood; that is, the influence that it may continue to have in Southern Mediterranean countries after the political changes that have taken place in the region.

In this respect, question C1 asks respondents to assess the EU's degree of influence in the Mediterranean area in four fields. Out of the four options suggested, most respondents consider that the EU has a high or very high influence in the MPCs as an economic and trading partner.

From the other options, the influence of the EU as a driver of governance reform in the MPCs is considered slightly high, while its role as a promoter of strengthened Euro-Mediterranean cooperation has very divided results between respondents who believe that the EU has a high or very high influence, those who consider that it is neither high nor low, and those who think that it is low or very low.

Finally, the assessment of the EU's influence as a mediator and peace broker reveals that most respondents (42%) consider it low or very low.

**Graph 29.1: Influence of the European Union in the present framework of a multipolar scenario**



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

Analysing the options individually, we note that, for the assessment of the EU as a promoter of strengthened Euro-Mediterranean integration, the results by origin of respondents are very similar to the overall results with the exception of Maghreb respondents, who believe it is less influential, while those from the Mashreq consider its influence is higher than respondents as a whole (see Block 2, Annex IV). Moreover, it should be emphasised that the results by type of institution of the respondents show that most policy-makers think that the EU's influence is high, far above experts or civil society members (51%, 32% and 36%, respectively).

**The EU role as a promoter of strengthened Euro-Mediterranean integration is assessed much more positively by policy-makers than by experts of civil society members.**

The US and the UN are unsuccessful in promoting peace in the region, and in helping individual countries to establish the rule of law in the political system. On the contrary, support for Islamists (for the sake of democracy) in a country's representation has made things worse over the last two years. If not the US and the UN, then the EU's chance to bring peace to the region is limited. However, the EU can benefit from the mediating and moderating effects of commercial and economic activities, as long as Southern Mediterranean countries prepare for EU investment. Also, the EU may transfer its experience of democratic institutions and civil society to help these countries establish and develop good governance.

Turkish respondent

The EU is attempting to promote democracy in the Mediterranean through more aid, mobility and economic cooperation by investing in cooperation, the setting up of new institutions, and socialisation of good practices. But this cannot easily transform into a politically influential role in the region since the EU has too many internal views.

Italian respondent

In terms of the EU's influence as an economic and trading partner taking into account that the assessment from all the geographic areas is high, we do see small differences according to origin of respondents. Thus, EU respondents assess the EU's influence more highly in comparison to those from the MPCs, who consider its influence is slightly lower in this field (especially those from the Maghreb).

The EU's influence as a mediator and peace broker in the region is seen by respondents as the lowest of the four options. This trend is reflected in the results by respondents' areas of origin, always above 40% for those who believe that the influence is low or very low. One outstanding aspect of these results is the high percentage of Mashreq respondents who consider it very high. Moreover, in the results by type of institution, the group of experts provide the most negative assessment.

**The EU's influence as a mediator and peace broker in the Southern Mediterranean region is considered to be the lowest.**

The EU will continue to be a major trading partner, but regional integration depends largely on the southern countries themselves. Hopefully, the UfM projects will materialize, and in this case they may trigger better regional coordination. As mediator in regional conflicts, the EU's record is not good. Hopefully, the EU will draw lessons from the past decades in which it entertained cosy relations with authoritarian regimes and never used democratic conditionality.

Belgian respondent

The EU's role is viewed as moral and economic, rather than political.

Lebanese respondent

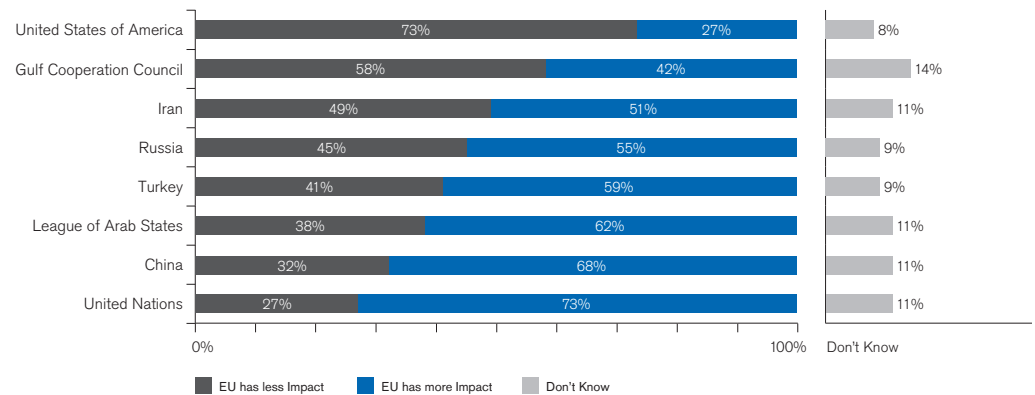
Finally, the assessment of the EU as a driver of the rule of law and governance reform, which is slightly high, is maintained in the distribution by areas. It is worth pointing out that the results of Israel are the lowest (almost 20% considers the EU's influence as "very low") or that among the types of institutions, policy-makers (50% of respondents) assess it between high and very high.

Question C2 asks respondents to assess the role of the EU in the MPCs in comparison with the role of other international actors. Out of the different actors suggested, only two are considered to have more impact in the region than the EU. On the one hand, the USA, which 73% of respondents believe to have more impact than the EU, and, on the other, the GCC, which most consider to be more influential although to a far lesser extent than the USA (58%).

**According to the respondents, only two actors, USA and GCC, will play a more important role in the region in the future than the EU.**

For Iran, respondents express a completely divided opinion, as half consider it to have a greater impact than the EU and the other half believe the opposite. For the remaining actors, most respondents believe that the EU has more impact in the region. Sometimes with a very small majority, as in the cases of Russia and Turkey, in others slightly greater, such as the League of Arab States, or others where it is very significant, such as China or the UN.

**Graph 29.2: Assessing the EU's future role in MPCs compared to other regional and international actors** (the graph below displays the EU's relative capacity to influence regional developments compared to other actors)



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

When the results are analysed according to whether respondents are from the EU or the MPCs, we find few differences but some of them are highly significant. MPC respondents make an assessment very similar to overall assessments of the impact of the USA, Iran, China, Turkey or the UN. However, they tend to assess Arab actors more negatively than the general assessment.

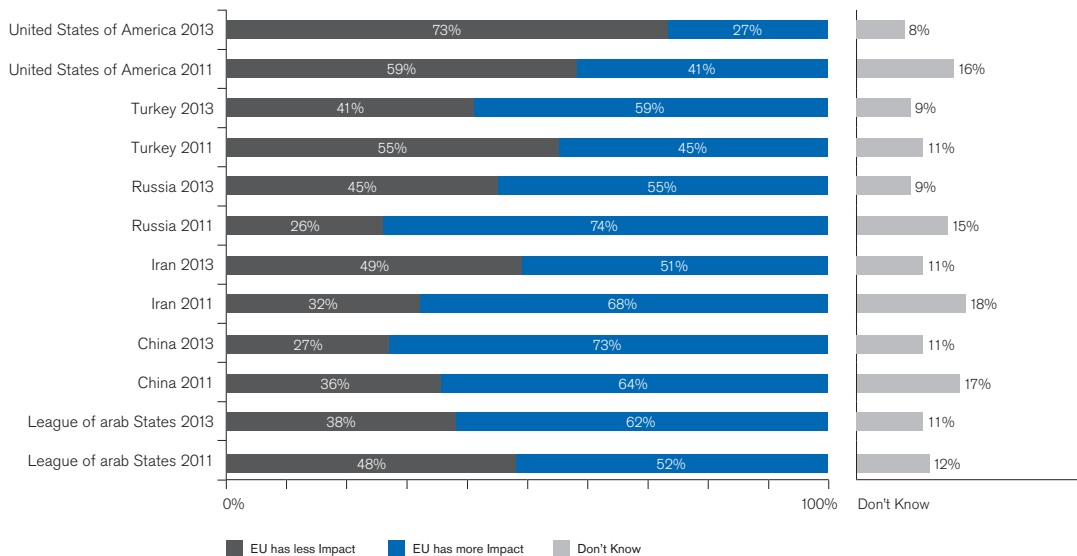
On the GCC, respondents are divided equally in relation to greater or lesser impact than the EU, while in terms of the League of Arab States the percentage that believes that it has less influence than the EU is even higher than the whole of respondents. Moreover, the percentage of MPC respondents who consider that Russia is more influential in the region than the EU is higher, reaching 50%. Similarly, EU respondents contrast with those from the MPCs: the number of those who positively assess the influence of Russia compared to the EU is lower and there are more who believe that the League of Arab States and the GCC are more influential than the EU (in the case of the League of Arab States, no more than 50% but in that of the GCC it reaches a notable 66%).

Finally, we analyse the results of this question in comparison to those of a similar question included in the 2011 Survey (see graph 29\_3). This comparison shows how according to respondents there are actors who have lost influence with respect to the EU while some others have increased it. Among the first we find the League of Arab States and Turkey (the latter case is significant as in 2011 most respondents considered its impact in the MPCs to be higher than that of the EU, while in 2013 the highest percentage is the opposite).

**In comparison with the results of 2011 Survey, the League of Arab States and Turkey have significantly lost their influence with respect to the EU.**

Moreover, actors such as Iran and Russia have seen how the percentage of respondents that considers that their impact is greater than that of the EU has increased, approaching 50%. A case apart is that of the USA, which, although it already achieved the percentage of respondents who consider that it is more influential than the EU, in the 2013 Survey this percentage has increased even more (from 59% to 73%).

**Graph 29.3: Assessing the EU's future role in MPCs compared to other regional and international actors. Comparing 2011 and 2013 survey results.** (The graph below displays the EU's relative capacity to influence regional developments compared to other actors).



Source: Compiled by the IEMed based on the results of the 3rd and 5th Euromed Survey

# AN ASSESSMENT OF EURO-MEDITERRANEAN POLICIES

## PRIORITY ON POLICY AREAS

### Main findings

- Priorities of the EU's policies in the near future: one third of the responses point out that political and democratic reforms must be the first priority, followed at a considerable distance by the creation of employment opportunities.
- Two outstanding elements of the Euromed agenda – the implementation of the EMFTA (Euro-Mediterranean Free Trade Agreement) and the management of migration and mobility of people – enter the top 5 priorities.
- It is noted that the impact and visibility of EU actions in the region during 2013 are still far from improving.
- The comparison between the 2012 and 2013 responses emphasises the greater relevance of impact above visibility.

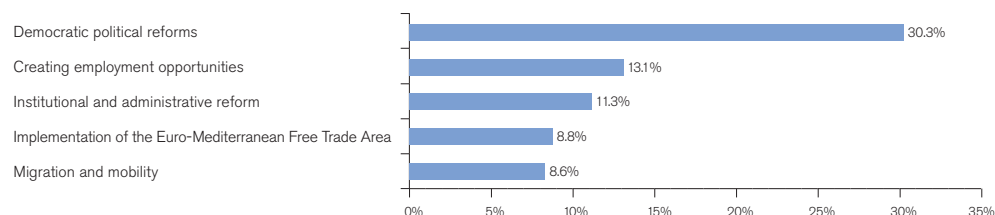
The third block of the Survey aims to monitor and identify the assessment of the regional policies and programmes developed during 2013; that is, questions related to the Euro-Mediterranean integration process in a year when the ENP is being re-approached and the UfM is tentatively beginning to develop its programmes.

Question D.1 in this block on assessing Euro-Mediterranean policies enables us to approach those areas of action in which the EU should prioritise its policies in the short term.

**One third of respondents indicate that political and democratic reforms should constitute the first priority of the EU's policies.**

Out of the eleven options suggested, one third of the responses points out that political and democratic reforms must be the first priority, followed at a notable distance by the creation of employment opportunities (13% of responses) and in third place institutional and administrative reforms (11%). Below 10% we find two outstanding elements of the Euromed agenda in this top 5: the implementation of the EMFTA (Euro-Mediterranean Free Trade Agreement) and the management of migration and mobility of people.

**Graph 30: EU's policies in the near future for the region: selecting policy areas according to its priority (5 areas considered to be 1st priority)**



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

Comparing the responses between participants from each shore of the Mediterranean we find minimum differences between the political priorities. There is a similarity between the first 5 priorities. A notable aspect is that the MPCs assess the need to implement political and democratic reforms slightly more positively (6% more than the EU-28 countries). The trend is the opposite in reference to the creation of employment opportunities, in which responses from the EU have a clearer trend to label it as a priority. Finally, this trend of European countries giving more priority to the field of migration and mobility is repeated (see Block 3, Annex IV).

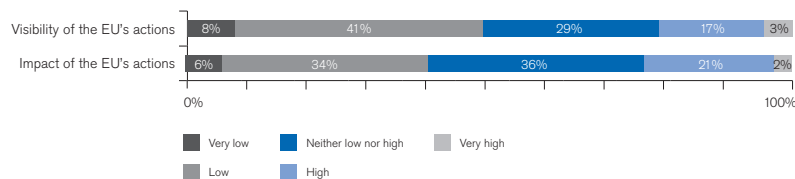
**Europeans give more importance to the creation of employment opportunities and the issues of migration and mobility than respondents from the Mediterranean Partner Countries.**

### Impact and visibility of EU action in the Mediterranean

The assessment of the actions carried out by the EU takes centre stage in question D.2, which has a precedent in last year's Survey. We note that, in relation to the actions carried out during 2013, both indicators are still far from improving. While 20% of respondents consider the visibility of the EU action in the Southern Mediterranean as high or very high, 23% indicates that its impact is high or very high.

The need to improve is clearer if we read the results based on the low or very low assessment of both visibility and impact. In this case, almost 50% of responses show this low degree of visibility, while with reference to impact responses amount to 40%.

**Graph 31: Assessing the impact of the EU's actions in Mediterranean Partner Countries in 2013**



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

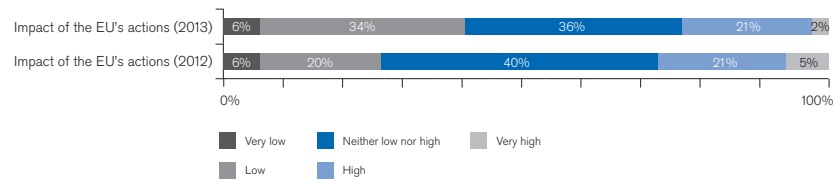
Results according to regional field show a greater trend to assess the visibility and impact from the EU itself as low or very low. Moreover, it is notable that the difference between the neutral assessment (neither low nor high) is considerably higher for responses from Southern Mediterranean countries.

**Most respondents consider the impact and visibility of the EU's actions in the region as low or very low.**

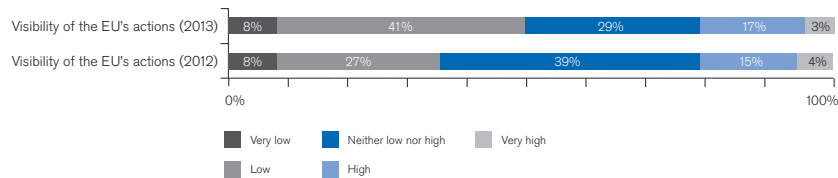
The comparison between the responses for the years 2012 and 2013 indicates the greatest relevance of impact before visibility. Moreover, it indicates a trend to assess both indicators more negatively. This must be taken as indicative data given that the assessment typology was different in the 2012 and 2013 surveys and we have produced a scale enabling us to compare them. It should be noted that the main change between 2012 and 2013 lies not so much in the positive assessment, which varies little, but in the fact that there is a change from one year to the other, from the neutral to negative assessment (see graph 31).

**In comparison with the 2012 Survey responses, more respondents negatively assess the impact and visibility of the EU's actions.**

**Graph 32: Assessing the visibility of the EU's actions in Mediterranean Partner Countries (comparing 2012 and 2013 results)**



**Assessing the visibility of the EU's actions in Mediterranean Partner Countries (comparing 2012 and 2013 results)**



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

Cette évaluation reste une moyenne discutable, les pays du sud de la Méditerranée ne constituent pas une même entité d'opinion d'une part et sont soumis à des enjeux différents. Ceci étant, l'importance des actions de l'EU est en fonction de deux critères : efficacité et crédibilité. La visibilité restera subordonnée à celle des institutions européennes.

Algerian respondent

The EU has its attention diverted to its internal situation: the Mediterranean region has lost its rank as "top priority". Events in African Sub-Saharan countries and even in Ukraine have mobilized EU energy and resources. The EU suffers from lack of visibility as such. None of the UfM big projects has materialized: they were supposed to be visible and integrative.

Belgian respondent

Il est surprenant de constater qu'en dépit de l'engagement financier important (en terme absolu) de l'EU dans la région, l'impact ne soit pas aussi visible. Cela est probablement dû à la multiplicité de petits projets (physiques) dilués dans le paquet global des projets financés par d'autres organisations internationales. La visibilité de l'EU dans la région ne sera à mon sens plus efficiente que si elle se focalise d'abord sur les pays qui sont les plus engagés stratégiquement avec elle et que son action se concentre sur les appuis budgétaires aux réformes sectorielles dont les impacts positifs en termes politique, démocratique, économique et sociale sont les plus probants.

Moroccan respondent

Impact is highly related to the type of action that the EU has undertaken. In the area of policy support and administrative sectors reform, EU programs are more effective and may in the long term be more visible as they will facilitate the integration of the neighbourhood countries with the EU based on harmonized policies and standards interpretations.

Jordanian respondent

## Assessing the ENP measures in the Southern Mediterranean countries

### Main findings

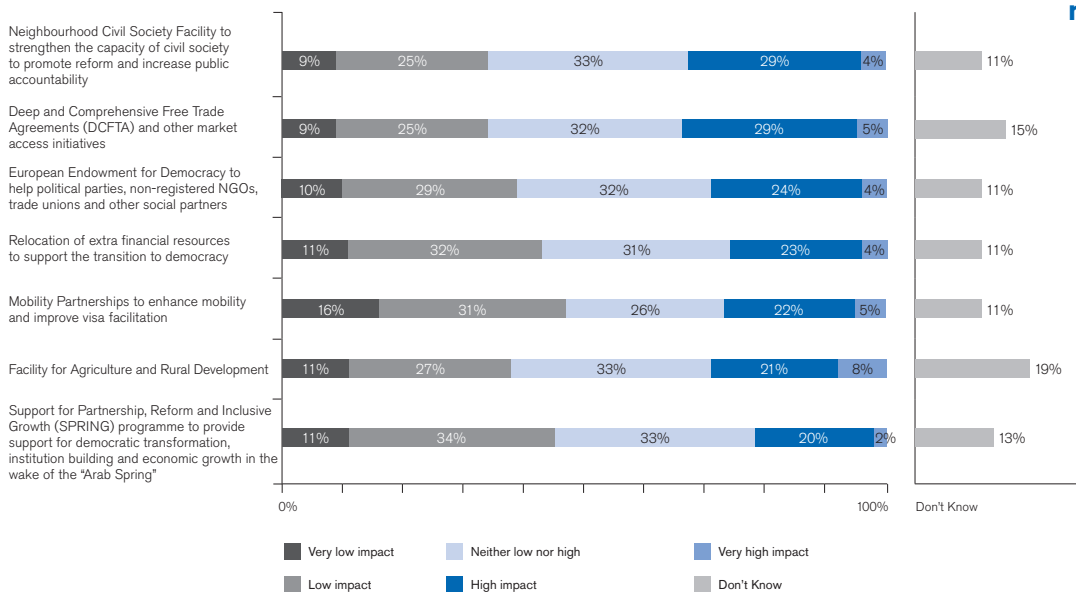
- ENP measures: two stand out above the rest as they have a balanced assessment of their impact between positive, negative and neutral responses: Neighbourhood Civil Society Facility and Deep and Comprehensive Free Trade Agreements.
- The assessments of initiatives related to the support of democratic transitions tend to highlight the low or very low impact (around 40-45% of the responses).
- The regional analysis of the responses to this question provides few differences with respect to the sample average, but responses from the Maghreb and the Mashreq are more critical, with a slightly higher percentage of negative responses than the remaining Euro-Mediterranean regions.

Responses received for question D.3 enable us to have a detailed approach to the main programmes developed within the field of the European Neighbourhood Policy (ENP) for the Mediterranean. It is notable that around 10% of respondents recognise that they do not have enough information to answer this question. This option amounts to 20% when assessing the Facility for Agricultural and Rural Development and 15% in the case of the Deep and Comprehensive Free Trade Agreements (DCFTA).

Two policies stand out above the others as they receive a balanced assessment of their impact between positive, negative and neutral responses (see graph 33): the Neighbourhood Civil Society Facility and the DCFTA. It should be noted that in the previous Euromed Survey, these two elements related to the ENP were considered to be of highest priority within the set of projects linked to the Partnership for Democracy and Shared Prosperity with the Southern Mediterranean (see graph 34).

**Among the ENP measures, only the Neighbourhood Civil Society Facility and the DCFTA receive a balanced assessment of their impact between positive, negative and neutral responses.**

**Graph 33: Assessing the the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries**



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

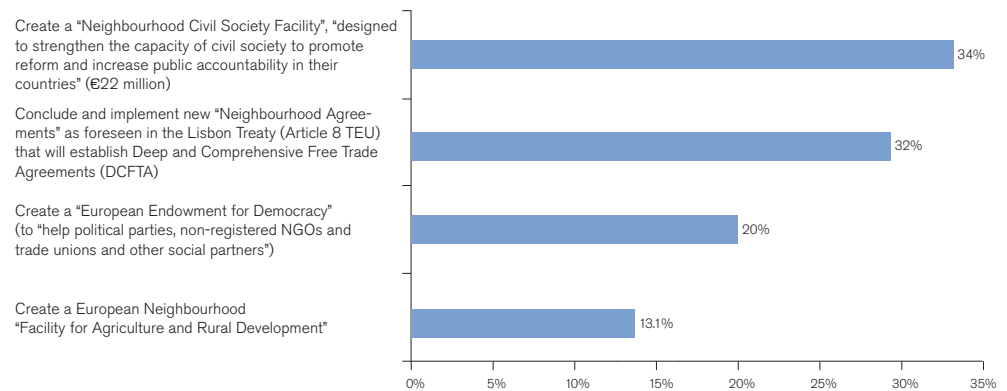
Pour assurer une meilleure visibilité et efficacité de tous ces programmes, il est nécessaire de suivre leur réalisation sur le terrain en partenariat avec la société civile.

Hungarian respondent

These measures presupposed a higher absorption capacity in the southern partners than they in fact had. Therefore their efficiency rate proved to be low. More consideration has to be given to the realities than to wishful concepts.

Hungarian respondent

**Graph 34: Classification of priorities identified in the Communications of the European Commission and the High Representative on: “A Partnership for Democracy and Shared Prosperity with the Southern Mediterranean”** (answers as first priority in %)



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

**Initiatives related to the support for democratic transitions, such as SPRING programme, EED and relocation of extra financial resources, are assessed as having low or very low impact.**

It is notable that the assessment of the initiatives related to the support for democratic transitions tends towards highlighting their low or very low impact (around 40-45% of responses), such as the SPRING Programme, the European Endowment for Democracy and the relocation of extra financial resources to support the transition to democracy. It is also important to emphasise the degree of ignorance of these programmes (between 11% and 13%) among the experts and actors who have answered the questionnaire. This is also the case of Mobility Partnerships (47% of low/very low impact) where 16% of the responses consider that their impact is very low.

Very important initiatives such as the European Endowment for Democracy and the Neighbourhood Civil Society Facility have not worked long enough to assess impact. Mobility partnerships programme is crucial but has not been really implemented.

German respondent

The impact of the Spring Programme, the support of transition, the strengthening of civil society and political parties is globally positive. But the resources devoted to these programmes are limited and the follow up leaves much to be desired. More auditing and evaluation should be done to improve the efficiency of EU actions and to better select the beneficiaries.

Belgian respondent

The regional analysis of the responses to this question follows the same line as other questions in the questionnaire as there are few differences with respect to the sample average. Responses from the Maghreb and Mashreq are more critical, in the sense that the percentage of negative responses is slightly higher than the remaining Euro-Mediterranean region (for detailed results, see Annex IV).

**Respondents from Maghreb and Mashreq assess the ENP measures more critically than the Europeans.**

L'impact est en général est faible et c'est à cause de manque de cohérence dans la vision globale et aussi à cause du manque de coordination entre les différents programmes. Il y a également une difficulté majeure dans les procédures de partenariat avec l'EU. Très peu de communication, en dehors des officiels, avec la représentation diplomatique de l'EU.

Moroccan respondent

Les régimes en place filtrent les actions de l'EU. Ils encouragent celles qui les avantagent et découragent celles qui les désavantagent au profit de l'opposition.

Algerian respondent

A l'image du Processus de Barcelone qui a échoué, la Politique Européenne de Voisinage reste une approche plus politique qu'économique et culturelle... Aujourd'hui, le nord est préoccupé par l'instabilité de ses voisins du sud et l'insécurité menaçante qui tente de s'y installer.

Tunisian respondent

## Assessing the Union for the Mediterranean projects

### Main findings

- The UfM projects considered to be of greatest priority focus on the fields of Environment and Water and Energy as they have the highest assessment percentage.
- Responses received from the north and from the south follow similar patterns. However, there are interesting nuances to point out.
- Responses from the MPCs attach greater priority to projects in which human capital, strategic infrastructure planning or town planning are the main issues.
- It is quite the contrary if the projects have a more technical component or promote the labour market or the role of women, to which responses from the EU-28 attach the greatest priority.
- For some of them, the degree of ignorance is notable and in some cases it exceeds 30% of responses received.

The overall classification of the 15 UfM projects enables us to assert two elements. Firstly, the issues considered to be of greatest priority focus on the fields of Environment and Water and Energy, which make up the first three programmes with the highest assessment percentage (high priority).

**Among the UfM projects, those related to Environment, Water and Energy are considered to be of greatest priority.**

Secondly, responses received from the north and from the south follow similar patterns. However, there are interesting nuances to point out. For instance, in projects where human capital (Euromed University in Fes, education in food security, Euromed masters), infrastructure strategic planning or town planning (trans-Maghreb motorways, urban strategic planning) are the main issues, responses from the MPCs attach greater priority to them compared with the EU-28 responses. It is quite the contrary if the projects have a more technical component (Governance and Financing of Water Sector), promote the labour market (Mediterranean initiative for jobs) or promote the role of women (Empowerment of women, Young women as job creators), which responses from the EU-28 see as the greatest priority.

Priorities should be given to projects that will be more inclusive, comprehensive and cover greater regions so that more people will be involved and benefit from the outcome. If projects are regional (geometry variable) but the outcome could be beneficial to the whole region, then similar/same projects should be extended, introduced and implemented in the other regions. Small but immediate successful result-oriented projects should be encouraged in order to create an atmosphere of success for the UfM and the confidence that will be reflected within the partnership.

Turkish respondent

Il faut privilégier les actions en faveur de l'humain car le sud connaît un déficit énorme en capital humain et social. Egalement la question énergétique et celle de l'eau sont au centre de la problématique du développement de la région.

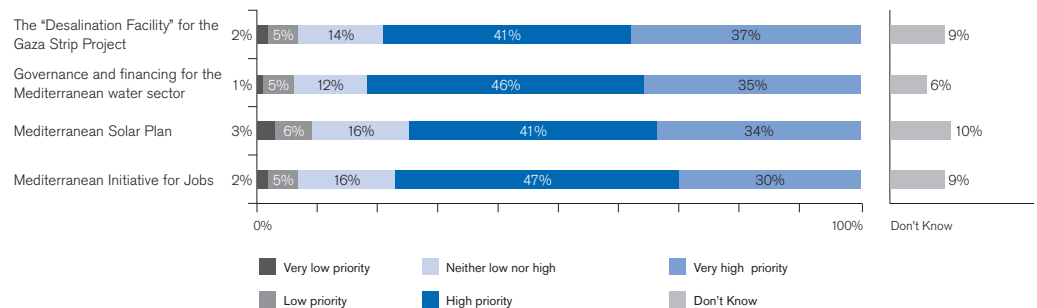
Moroccan respondent

Many of the Union for the Mediterranean's projects only make sense when paired with the necessary political underpinning (e.g. creating conditions for trade, student exchange, employment, research, etc., by genuine visa facilitation, lowering protectionist barriers, etc.). Like its predecessors, the UfM cannot pretend to function as a technical project hub disconnected from Member States' policy-making.

German respondent

The details of the results enable us to distinguish four groups according to the degree of priority given to the UfM programmes. The first group is characterised by a high percentage of “very high priority” responses, considerably above 30%, and which, adding together assessments as “high priority”, exceed 75% of responses (see graph 35). These are the aforementioned programmes on water management, the solar plan, the Euromed initiative for jobs and business development programme.

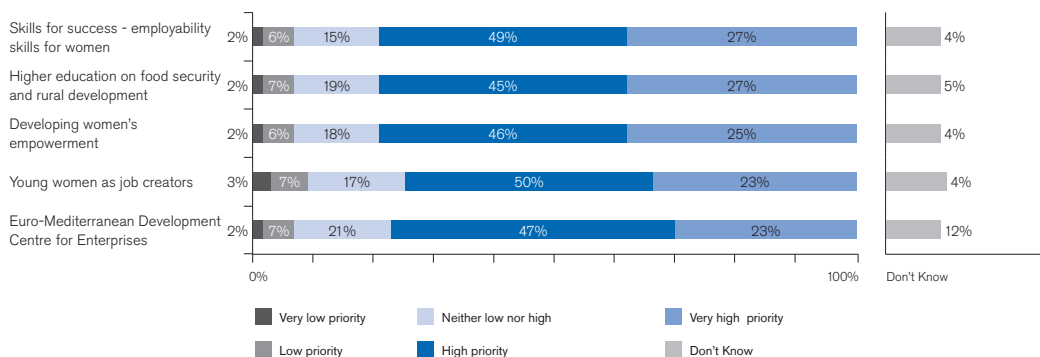
**Graph 35: Degree of priority attributed to the following projects of the Union for the Mediterranean** (ordered by % of “Very high priority” answers)



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

The second group is formed by the “very high priority” assessments, which amount to around 25%, and, together with the “high priority” responses, do not exceed 75% as in the first group. In other words, they are considered to have a very high priority but not with the intensity of the previous programmes. In this group we find all the programmes related to social and civic affairs, one for higher education and research, on food safety and rural development, and the remaining business development programme.

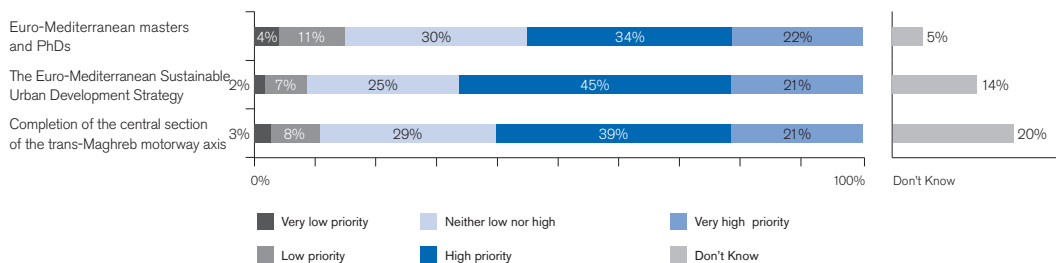
**Graph 36: Degree of priority attributed to the following projects of the Union for the Mediterranean** (ordered by % of "Very high priority" answers)



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

The third group continues to have a high assessment in terms of priority but no longer has the intensity of the previous groups. Adding together both options (high and very high priority) they amount to between 50% and 60% of the responses and in some cases the level of ignorance of the programme is significant (see graph 37). In this group there are two transport and urban development programmes and one on higher education and research.

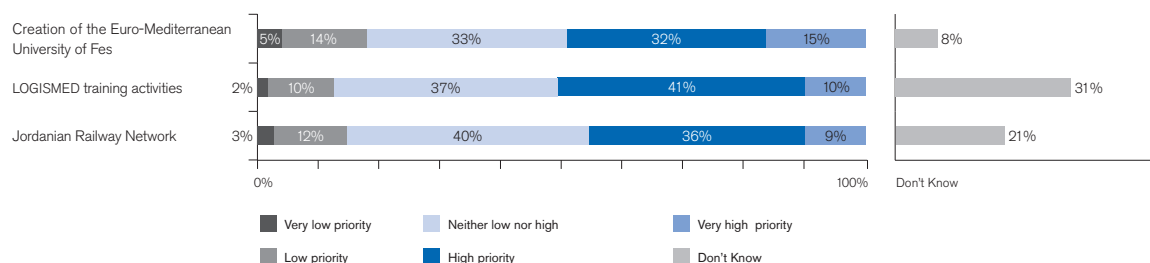
**Graph 37: Degree of priority attributed to the following projects of the Union for the Mediterranean** (ordered by % of "Very high priority" answers)



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

The fourth group comprises the UfM programmes for which not only does the level of high priority decrease considerably but also the percentages of low/very low priority exceed the previous ones in many cases. We can also see that for some of them degree of ignorance is notable, and in some cases it exceeds 30% of the responses received, such as in the training on LOGISMED. It should be noted, however, that the views do not range from priority to non priority but that the percentage of responses that grows the most is the neutral option "neither low nor high".

**Graph 38: Degree of priority attributed to the following projects of the Union for the Mediterranean** (ordered by % of "Very high priority" answers)



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



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# LIST OF RESPONDENTS

## LIST OF RESPONDENTS

The European Institute of the Mediterranean ensures the absolute anonymity of the replies by participants. The data has been processed after coding each questionnaire. In addition, there is a minimum number of respondents per country to ensure that the responses cannot be traced back to any of them.

In addition, respondents had the option of not appearing on this final list of participants. 86 out of 838 respondents chose not to be included; therefore this list has a total of 752 names.

- AALLAS, ESA. Yle radio 1, Finland
- ABBONDANZA, MARCO. Festival Sete Sóis Sete Luas, Italy
- ABDALLAH, AMR. The International Foundation for Electoral Systems, Egypt
- ABDEL RAOUF, MAHITAB. Agence de presse du Moyen Orient, Egypt
- ABDEL SAMAD, ZIAD. Arab NGO Network for Development, Lebanon
- ABDELFATTAH, MOHAMED ALI. The Egyptian Center for Economic Studies, Egypt
- ABDELMALEK, ABDALLAH. Institut Tunisien de la Compétitivité et des Etudes Quantitatives (ITCEQ), Tunisia
- ABDERRAHMANE, BENKHALFA. Freelancer, Algeria
- ABDL-ZUABI, AREEN. The Advocacy Center for Arab Citizens of Israel, Israel
- ABDUL HADI, MAHDI. Passia, Occupied Palestinian Territories
- ABDULLAH, SAMIR. Palestine Economic Policy Research Institute (MAS), Occupied Palestinian Territories
- ABEDRABBO, RAEDE. Applied Research Institute Jerusalem (ARIJ), Occupied Palestinian Territories
- ABI SALEH, GEORGE. Plateforme Civile Euromed, Lebanon
- ABIS, SÉBASTIEN. CIHEAM, France
- ABOU MITRY MESSARRA, EVELYNE. Fondation libanaise pour la paix civile permanente, Lebanon
- ABOULLOUZ, ABDELHAKIM. Centre Marocain des Sciences Sociales, Morocco
- ACHMAWI, RANDA. Al Ahram Hebdo, Egypt
- ADDI, LAHOUARI. Institut d'études politiques (IEP) de Lyon, Algeria
- ADDOUNE, ALI. Institute of Arab Research and Studies, Algeria
- AFAF, MARIE. The Egyptian Association for Community Participation Enhancement, Egypt
- AFZA, DRISS. France
- AHMAR DAKNEH, SUSAN. Syria National Tempus Office, Syria
- AHOUATE, LAHCEN. Ministère de l'agriculture et de la pêche maritime, Morocco
- AIT ALI, HASSAN. Université Hassan II, Casablanca, Morocco
- AIT HAMZA, WADIA. École de Gouvernance et d'Économie de Rabat (EGE Rabat), Morocco
- AIT-CHAALAL, AMINE. Centre d'Etudes et Recherches sur le Monde Arabe Contemporain, Belgium
- AKCAER, GURKAN. S&G System and Generation Association, Turkey
- AKESBI, NAJIB. Institut Agronomique et Vétérinaire Hassan II, Morocco
- AKROUT, SALEM. Unité de Gestion du Programme d'Appui à l'Accord d'Association et du Plan d'Action Voisinage Tunisie, Tunisia
- AL ACHKAR, RANI. Centre libanais pour la conservation de l'énergie (LCEC), Lebanon
- AL EMAM, MAHASSEN. Arab Women Media Center, Jordan
- AL HMAIDI, MOHAMMAD. Palestine Water Authority, Occupied Palestinian Territories
- AL KHOURI, RIAD. DEA Inc., Jordan
- AL MISILHI, AHMAD. Egyptian Foundation for Advancement of the Childhood Conditions, Egypt
- AL MUHASNEH, RASMI. Audiovisual Commission, Jordan
- AL RUBAYE, MOHAMMED SEDEEQ. National Music Conservatory, Jordan
- AL SAAD, ZIAD. Yarmouk University, Jordan
- ALAGHA, JOSEPH. Radboud University Nijmegen, Lebanon
- ALAOUI, ABDELMALEK. Global Intelligence Partners, Morocco
- ALBARRACÍN, JAVIER. Institut Europeu de la Mediterrània, Spain
- ALBERTI, FABIO. Un ponte per / MEDLINK, Italy
- ALCOVERRO, TOMÁS. La Vanguardia, Spain
- ALESSANDRINI, SERGIO. University of Modena and Reggio Emilia, Italy
- ALHAJ, ABEDALSALAM. The Royal Film Commission, Jordan
- ALHANIFAT, KHALED MUSA. Municipality of Greater Tafilah, Jordan
- AL-HASSAN, SA'EB. We Are All Jordan Youth Commission, Jordan
- ALIBONI, ROBERTO. Istituto Affari Internazionali, Rome, Italy
- ALLAL, HOUDA. Observatoire Méditerranéen de l'Energie, France
- ALLAM, RABHA SEIF. Al-Ahram Center for Political and Strategic Studies (ACPSS), Egypt
- ALLAM, JARRAR. PNGO, Occupied Palestinian Territories
- ALLAOUI, MOHAMED. Freelancer, Morocco
- AL-MAWALDI, IHAB. Director of Planning, Syria
- ALMERAS, GUILLAUME. BGV, France
- ALSHGAIRAT, HUSSEIN MAHMOUD. Dar Aleghwan for Studies and Research, Jordan
- ALSOUFI, AREF. Lebanese University, Ministry of Education and Higher Education, Lebanon
- ALTAQI, SAMIR. Orient Research Centre, Syria
- ALTUNISIK, MELIHA. Middle East Technical University, Turkey
- ALVAREZ-OSSORIO, IGNACIO. Universidad de Alicante, Spain
- ALVES, MÁRIO. ETNIA, Portugal
- AMARA, AMINE. Institut Amadeus, Morocco
- AMBRÓSIO, VITOR. Escola Superior de Hotelaria e Turismo do Estoril, Portugal
- AMERIGO, JULIE. ASCAME, France
- AMINEH, MEHDI PARVIZI. International Institute for Asian Studies, University of Amsterdam, Webster University, Netherlands

- AMOROSO, BRUNO. The Department of Society and Globalisation, Roskilde University, Denmark
- AMRAOUI, ALLAL. Commune de Fès, Morocco
- ARBE, SAMUEL. Slovak Foreign Policy Association (SFFA), Slovakia
- ARBÓS AYUSO, FEDERICO. Instituto Cervantes de Rabat, Spain
- ARI, YILMAZ. Balikesir University, Turkey
- ARTAL TUR, ANDRÉS. Technical University of Cartagena, Spain
- ARVANITIS, RIGAS. Institut de recherche pour le développement, France
- ASSAF, NABIL. FAO, Lebanon
- ATKINS, ROBERT. European Parliament, United Kingdom
- ATTAR, SAMAR. Independent scholar, Syria
- ATTARD, GRACE. National Council of Women Malta, European Economic and Social Committee (EESC), Malta
- ATTINA, FULVIO. University of Catania, Italy
- AUBARELL SOLDUGA, GEMMA. Anna Lindh Foundation, Spain
- AVANZI, ENZO. Employers' Association, Public Sector, Italy
- AVELLAN, CHRISTOPHE. Pôle de compétitivité Mer PACA, France
- AWAD, IBRAHIM. The American University in Cairo (AUC), Egypt
- AYACHI, SAMI. Centre Technique de l'Agro-Alimentaire, Tunisia
- AYALA, OSCAR. IEMed, Spain
- AYBEY, ALI. Turkish International Cooperation and Development Agency (TIKA), Turkey
- BADIOLI, FRANCESCO. Euromed Audiovisual II Programme, Italy
- BAGOULLA, CORINNE. Université de Nantes, France
- BAIJOU, AHMAD. Al Akhawayn University in Ifrane, Morocco
- BALÁZS, DÉRI. Eötvös Loránd University, Budapest, Hungary
- BALFOUR, ROSA. European Policy Centre (EPC), United Kingdom
- BALODE, INTA. Latvian Professional Contemporary Dance Choreographers Association, Latvia
- BALTA, PAUL. Forum Euro-Méditerranéen des Cultures, France
- BANIA, RADOSLAW. Department of Middle East and North Africa, University of Lodz, Poland
- BARAKAT, RIMAN. Israel/Palestine Center for Research and Information, Occupied Palestinian Territories
- BARDAK, UMMUHAN. European Training Foundation, Turkey
- BARGHOUTY, REEM. Jordan Forum for Business and Professional Women, Jordan
- BARNEA, AARON. Parents Circle - Families Forum, Israel
- BARÓN CRESPO, ENRIQUE. European Foundation for the Information Society, Spain
- BAROUDI, MARWAN. Transport & Mobility System, Lebanon
- BARRENADA, ISAIAS. Universidad Complutense de Madrid, Spain
- BASSOLS SOLDEVILA, ANDREU. Deputy Head of Division, Mexico and Central America, Spain
- BAUER, MICHAEL. Center for Applied Policy Research, University of Munich, Germany
- BAUER, SUSANNE LUCIE. Collective Leadership Institute, Germany
- BAYANER, AHMED. Centre for Economics Research on Mediterranean Countries, Akdeniz University, Turkey
- BAYOUMI, GAMAL. Twinning National Contact Points - South, Egypt
- BAYSAL, SINEM. Foreign Policy Institute (FPI), Bilkent University, Turkey
- BECYS, ANDRIUS. Kulturos centras in Actio, Lithuania
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# SAMPLE OF THE SURVEY

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Country	Answers 2010		Answers 2011		Answers 2012		Answers 2013	
	Total	% Total Survey	Total	% Total Survey	Total	% Total Survey	Total	% Total Survey
Morocco	40	6.7%	58	8.3%	62	7.4%	85	10.1%
Algeria	41	6.9%	45	6.5%	45	5.6%	40	4.8%
Turkey	31	5.2%	40	5.8%	43	5.1%	43	5.1%
Egypt	39	6.5%	35	5.0%	40	4.7%	46	5.5%
Tunisia	30	5%	35	5.0%	43	5.1%	42	5.0%
Syria	15	2.5%	8	1.2%	12	1.4%	15	1.8%
Israel	18	3.0%	24	3.5%	26	3.1%	21	2.5%
Occupied Palestinian Territories	22	3.7%	21	3.0%	24	2.8%	25	3.0%
Lebanon	17	2.8%	24	3.5%	29	3.4%	33	3.9%
Jordan	19	3.2%	20	2.9%	26	3.1%	26	3.1%
Mauritania	6	1.0%	7	1.0%	8	0.9%	7	0.8%
Libya	1	0.2%	1	0.1%	1	0.1%	1	0.1%
Croatia	8	1.3%	6	0.9%	12	1.4%	8	1.0%
Albania	1	0.2%	3	0.4%	3	0.4%	5	0.6%
Bosnia and Herzegovina	3	0.5%	35	0.7%	4	0.5%	6	0.7%
Montenegro	1	0.2%	6	0.9%	3	0.4%	4	0.5%
Monaco	2	0.3%	2	0.3%	0	0.0%	1	0.1%
<b>Total MPCs</b>	<b>294</b>	<b>49.2%</b>	<b>340</b>	<b>48.9%</b>	<b>383</b>	<b>45.4%</b>	<b>407</b>	<b>48.6%</b>
France	36	6.0%	43	6.2%	61	7.5%	71	8.5%
Spain	39	6.5%	34	4.9%	63	5.7%	59	7.0%
Italy	33	5.5%	37	5.3%	48	5.6%	49	5.8%
Germany	27	4.5%	37	5.3%	47	3.1%	43	5.1%
United Kingdom	12	2.0%	15	2.2%	26	1.2%	17	2.0%
Belgium	8	1.3%	14	2.0%	10	1.4%	11	1.3%
Portugal	6	1.0%	9	1.3%	12	3.0%	10	1.2%
Greece	15	2.5%	19	2.7%	25	1.5%	20	2.4%
Netherlands	6	1.0%	6	0.9%	13	1.9%	12	1.4%
Poland	12	2.0%	15	2.2%	16	0.8%	17	2.0%
Romania	7	1.2%	6	0.9%	7	1.1%	7	0.8%
Denmark	4	0.7%	10	1.4%	9	1.2%	5	0.6%
Czech Republic	6	1.0%	7	1.0%	10	1.4%	7	0.8%
Finland	6	1.0%	9	1.3%	12	1.4%	11	1.3%
Sweden	7	1.2%	12	1.7%	12	0.8%	13	1.6%
Austria	5	0.8%	7	1.0%	7	0.9%	9	1.1%
Ireland	4	0.7%	6	0.9%	8	0.9%	4	0.5%
Hungary	6	1.0%	7	1.0%	8	1.5%	10	1.2%
Cyprus	5	0.8%	7	1.0%	13	0.2%	9	1.1%
Slovakia	4	0.7%	3	0.4%	2	0.8%	4	0.5%
Slovenia	7	1.2%	10	1.4%	7	0.5%	10	1.2%
Lithuania	5	0.8%	6	0.9%	4	1.1%	3	0.4%
Malta	6	1.0%	9	1.3%	9	0.4%	7	0.8%
Latvia	2	0.3%	4	0.6%	3	0.8%	3	0.4%
Bulgaria	7	1.2%	5	0.7%	7	0.2%	5	0.6%
Estonia	3	0.5%	3	0.4%	2	0.7%	2	0.2%
Luxembourg	5	0.8%	2	0.3%	6	0.0%	3	0.4%
<b>Total EU</b>	<b>283</b>	<b>47.4%</b>	<b>342</b>	<b>49.2%</b>	<b>447</b>	<b>53.0%</b>	<b>421</b>	<b>50.2%</b>
<b>Other*</b>	<b>20</b>	<b>3.4</b>	<b>13</b>	<b>1.9</b>	<b>13</b>	<b>1.5</b>	<b>9</b>	<b>1.2</b>
<b>TOTAL</b>	<b>597</b>	<b>100%</b>	<b>695</b>	<b>100%</b>	<b>843</b>	<b>100%</b>	<b>838</b>	<b>100%</b>

\* Responses from: Macedonia, Pakistan, Russia, Sudan, USA (5)





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# QUESTIONNAIRE

# BLOCK A

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COMPOSITION OF THE SAMPLE

The European Institute of the Mediterranean ensures the absolute anonymity of the replies by participants. The data will be processed after codifying each questionnaire. In addition, there will be a minimum number of respondents per country to ensure that the responses cannot be tracked back to any of them.

However, a final list of participants will be included in the final report. If you do not wish to appear in this list, please let us know:

I do not want to appear in the list of participants.

In order to facilitate the data processing and to improve the statistical analysis, we would be very pleased if you could provide us with the following information:

#### Gender

Male

Female

#### Age

From 20 to 35

From 36 to 45

From 46 to 55

56 to 65

66 and more

#### Nationality

Here a menu with a list of countries with open question

#### Position

#### Institution

#### Institution of affiliation

Governmental	<input type="checkbox"/>
Diplomatic	<input type="checkbox"/>
EU institution	<input type="checkbox"/>
Other international organisation	<input type="checkbox"/>
Political party	<input type="checkbox"/>
Think tank	<input type="checkbox"/>
Academic	<input type="checkbox"/>
Media	<input type="checkbox"/>
NGO	<input type="checkbox"/>
Trade union	<input type="checkbox"/>
Company (Business sector)	<input type="checkbox"/>

**What is your main area of specialisation?**

	Main area of specialisation	2nd area of specialisation
Political Cooperation and Security		
Economic and Financial Cooperation		
Social, Cultural and Human Exchanges		
Migration and Justice Affairs		

Albania
Algeria
Austria
Belgium
Bosnia and Herzegovina
Bulgaria
Croatia
Cyprus
Czech Republic
Denmark
Egypt
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Israel
Italy
Jordan
Latvia
Lebanon

Lithuania
Luxembourg
Libya
Malta
Mauritania
Montenegro
Morocco
Netherlands
Occupied Palestinian Territories
Poland
Portugal
Romania
Slovakia
Slovenia
Spain
Sweden
Syria
Tunisia
Turkey
United Kingdom
Other



# BLOCK B

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DOMESTIC AND GEOPOLITICAL CHANGES  
IN THE EURO-MEDITERRANEAN REGION

## Domestic and Geopolitical Changes in the Euro-Mediterranean Region

B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?

In the Southern Mediterranean region	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

B1. a

Algeria	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B1. b****Egypt**

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B1. c****Jordan**

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B1. d****Lebanon**

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B1. e****Libya**

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B1. f****Morocco**

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B1. g****Occupied Palestinian Territories**

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B1. h****Tunisia**

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Don't know
Sectarian conflicts will increase						
Iranian leverage in the region will increase						
The Gulf's leverage in the region will increase						
The region will be increasingly fragmented as a consequence of the Syrian conflict						
Spread of radicalism and terrorism						
Refugee and migration flows in the region will increase						
Changes in the Nation-State model: fragmentation into ethno-religious constituencies						
Recognition of minorities						
Freedom of expression and press						

**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Don't know
League of Arab States						
China						
Iran						
Russia						
Gulf Cooperation Council						
Turkey						
United States of America						
European Union						
United Nations						

Comments:

**B4. Please arrange the following countries according to their likelihood of having better prospects for the consolidation of a democratic regime.**

Algeria	
Egypt	
Jordan	
Lebanon	
Libya	
Morocco	
Occupied Palestinian Territories	
Syria	
Tunisia	

Comments:

**B5. In the long term, how much will the following elements improve or deteriorate?****In the Southern Mediterranean region**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

**B5. a****Algeria**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

**B5. b****Egypt**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

--

**B5. c****Jordan**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

--

**B5. d****Lebanon**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

--

**B5. e****Libya**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

--

## B5. f

**Morocco**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

## B5. g

**Occupied Palestinian Territories**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

**B5. h****Syria**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

**B5. i****Tunisia**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Don't know
Rule of law and good governance						
Independence of the judiciary						
Civilian-military relations						
Level of corruption						
Economic prospective of the region						
Living standards of citizens						
Status of women						
Recognition of minorities						
Freedom of expression and press						

In the following countries:

# BLOCK C

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POSITION OF THE EU  
IN THE SOUTHERN  
MEDITERRANEAN REGION

## Position of the EU in the Southern Mediterranean Region

C1. In the framework of a multipolar scenario, what will be the EU's influence regarding the following aspects:

	Very low	Low	Neither high nor low	High	Very high	Don't know
The EU as a promoter of a strengthened Euro-Mediterranean regional integration						
The EU as a major trade and economic partner for MPCs						
The EU as a mediator and peace broker in the region						
The EU as a driver of the rule of law and governance reform						

Comments:

C2. Please assess the EU's role in the Southern Mediterranean countries compared to other regional and international actors.

EU's impact on the region compared to

	Less Impact	More Impact	Don't know
League of Arab states			
China			
Iran			
Russia			
Gulf Cooperation Council			
Turkey			
United States of America			
United Nations			

Comments:

**C3. Please arrange the following Southern Mediterranean countries according to their regional integration with the EU in the next 5 years, where 1 refers to the lowest level of engagement and interaction, and 9 refers to the highest level of engagement and interaction.**

Algeria	
Egypt	
Jordan	
Lebanon	
Libya	
Morocco	
Occupied Palestinian Territories	
Syria	
Tunisia	

Comments:



# BLOCK D

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AN ASSESSMENT OF  
EURO-MEDITERRANEAN POLICIES

## AN ASSESSMENT OF EURO-MEDITERRANEAN POLICIES

D1. Please select and arrange five of the following areas according to what you believe should be the priorities of the EU's policies in the near future.

Democratic political reforms	
Institutional and administrative reform	
Transitional justice	
Security sector reform	
Implementation of the Euro-Mediterranean Trade Area	
Economic governance	
Creating employment opportunities	
Partnership with civil society	
Women's empowerment	
Migration and mobility	
Development of youth policies	

Other:


D.2 Please assess the EU's role in the Southern Mediterranean countries compared to other regional and international actors.

	Very low	Low	Neither high nor low	High	Very high	Don't know
Impact of the EU's actions						
Visibility of the EU's actions						

Comments:


**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

	Very low impact	Low impact	Neither high nor low impact	High impact	Very high impact	Don't know
Support for Partnership, Reform and Inclusive Growth (SPRING) programme to provide support for democratic transformation, institution building and economic growth in the wake of the "Arab Spring"						
Relocation of extra financial resources to support the transition to democracy						
"Mobility Partnerships" to enhance mobility and improve visa facilitation						
Deep and Comprehensive Free Trade Agreements (DCFTA) and other market access initiatives						
Neighbourhood Civil Society Facility to strengthen the capacity of civil society to promote reform and increase public accountability						
European Endowment for Democracy to help political parties, non-registered NGOs, trade unions and other social partners						
Facility for Agriculture and Rural Development						

Comments:

--

**D.4 What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

	Very low priority	Low priority	Neither high nor low priority	High priority	Very high priority	Don't know
<b>Support for Partnership, Reform and Inclusive Growth</b>						
Developing women's empowerment						
Young women as job creators						
Skills for success – employability skills for women						
<b>Higher Education and Research</b>						
Higher education on food security and rural development						
Creation of the Euro-Mediterranean University of Fes						
Euro-Mediterranean masters and PhDs						
<b>Environment and Water</b>						
Governance and financing for the Mediterranean water sector						
The "Desalination Facility" for the Gaza Strip Project						
<b>Transport and Urban Development</b>						
Jordanian Railway Network						
The Euro-Mediterranean Sustainable Urban Development Strategy						
LOGISMED training activities						
Completion of the central section of the trans-Maghreb motorway axis						
<b>Business Development</b>						
Mediterranean Initiative for Jobs						
Euro-Mediterranean Development Centre for Enterprises						
<b>Energy</b>						
Mediterranean Solar Plan						

 Comments:

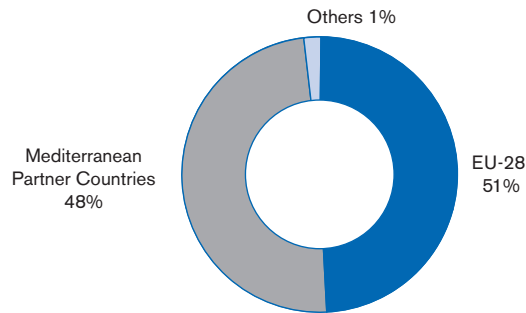


# BLOCK A

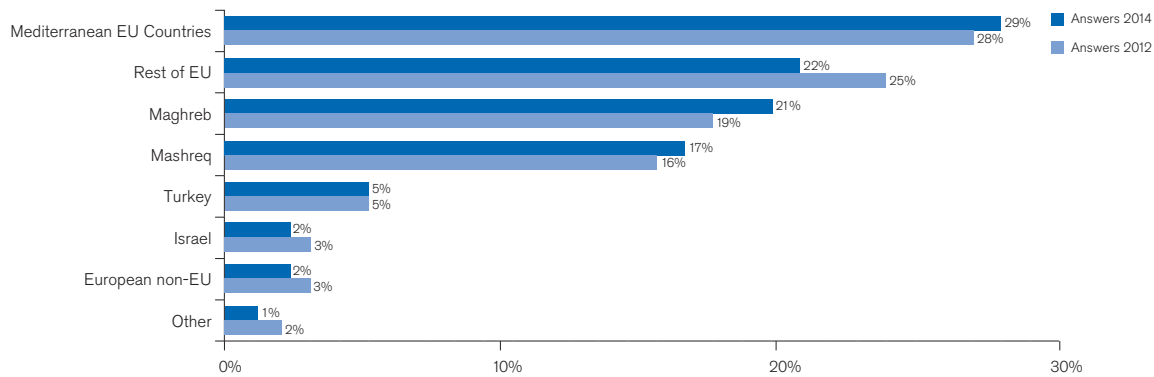
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COMPOSITION OF THE SAMPLE

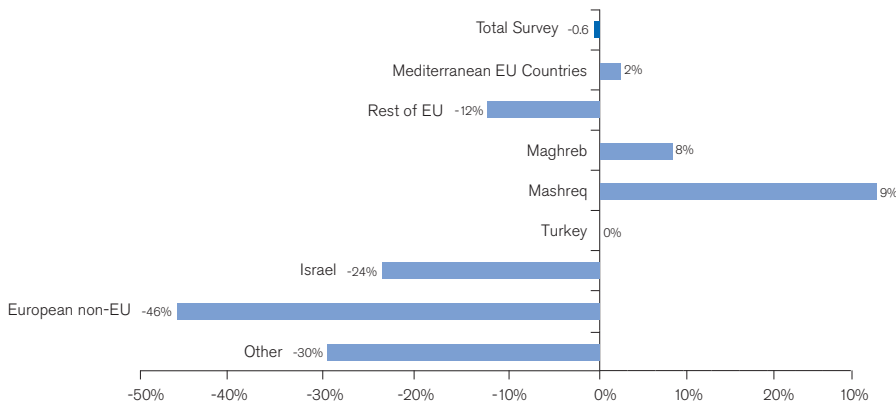
**Breakdown of responses by geographical origin: EU-27 and Mediterranean Partner Countries (EMP + UfM)**



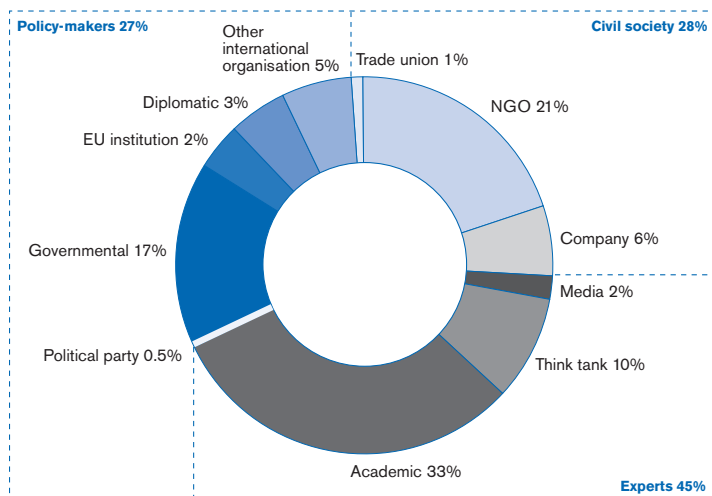
**Breakdown of respondents by region (in %)**



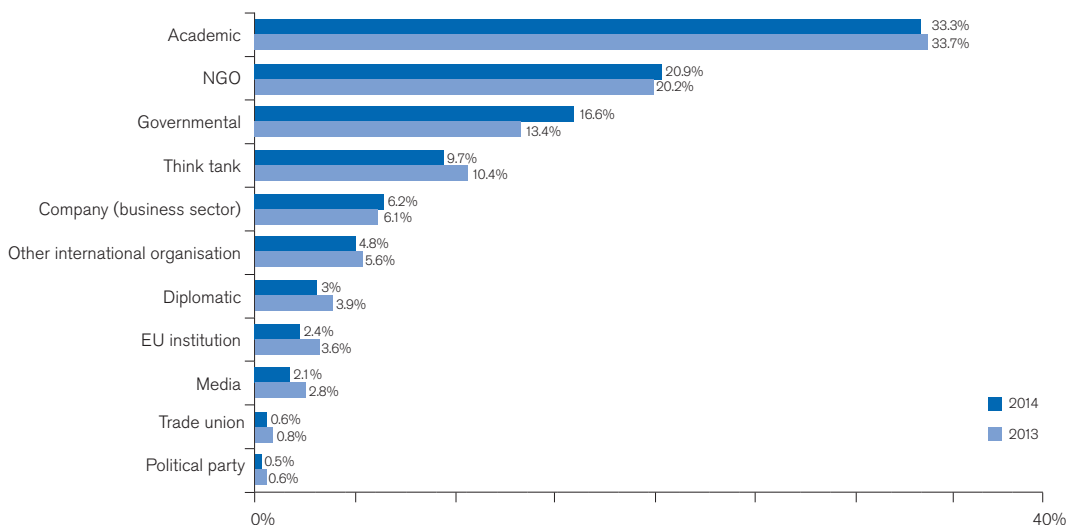
**Euromed Survey: comparison 2011 and 2012. Growth of country regions**



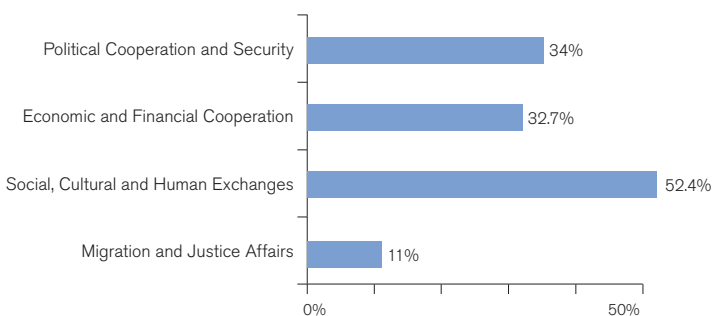
**Breakdown of respondents by type of institution**



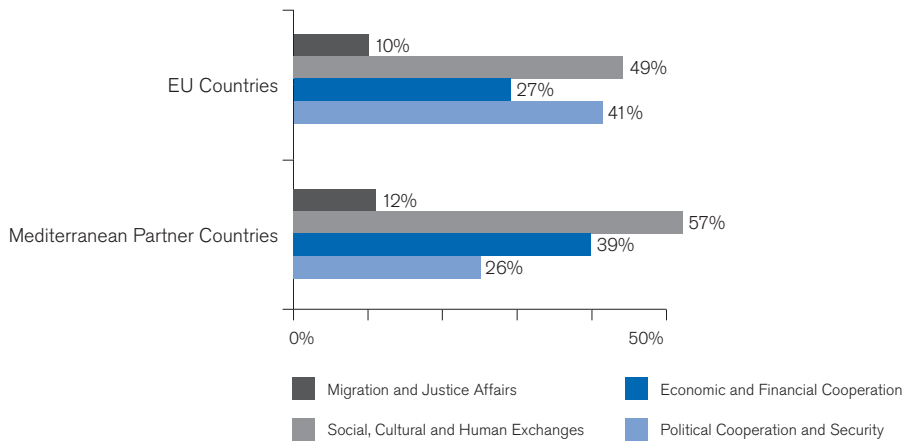
**Respondents by type of institution (% of total respondents)**



**Breakdown of respondents by area of specialisation**

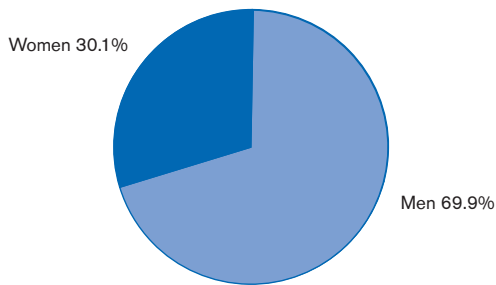


**Breakdown of respondents by area of specialisation and by region**

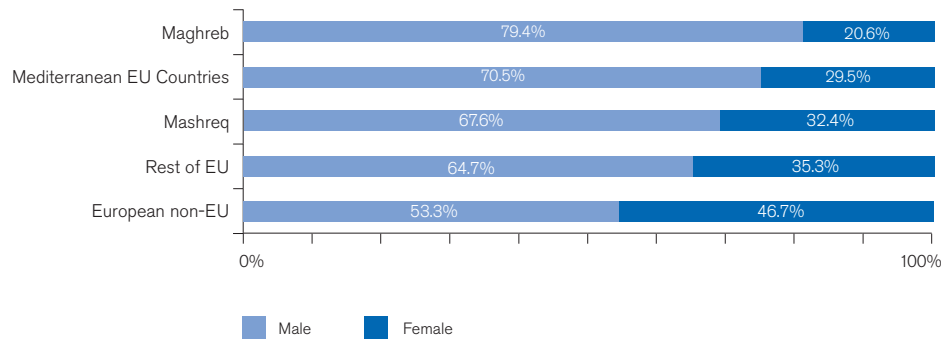


(Respondents could indicate one or two areas of specialisation. This graph shows aggregated totals for first and second choices as areas of specialisation. This is why the total percentage exceeds 100%.)

**Breakdown of respondents by gender**



**Breakdown of respondents by gender and regional groups**



# BLOCK B

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DOMESTIC AND GEOPOLITICAL  
CHANGES IN THE EUROMED REGION

### Domestic and Geopolitical Changes in the Euro-Mediterranean Region

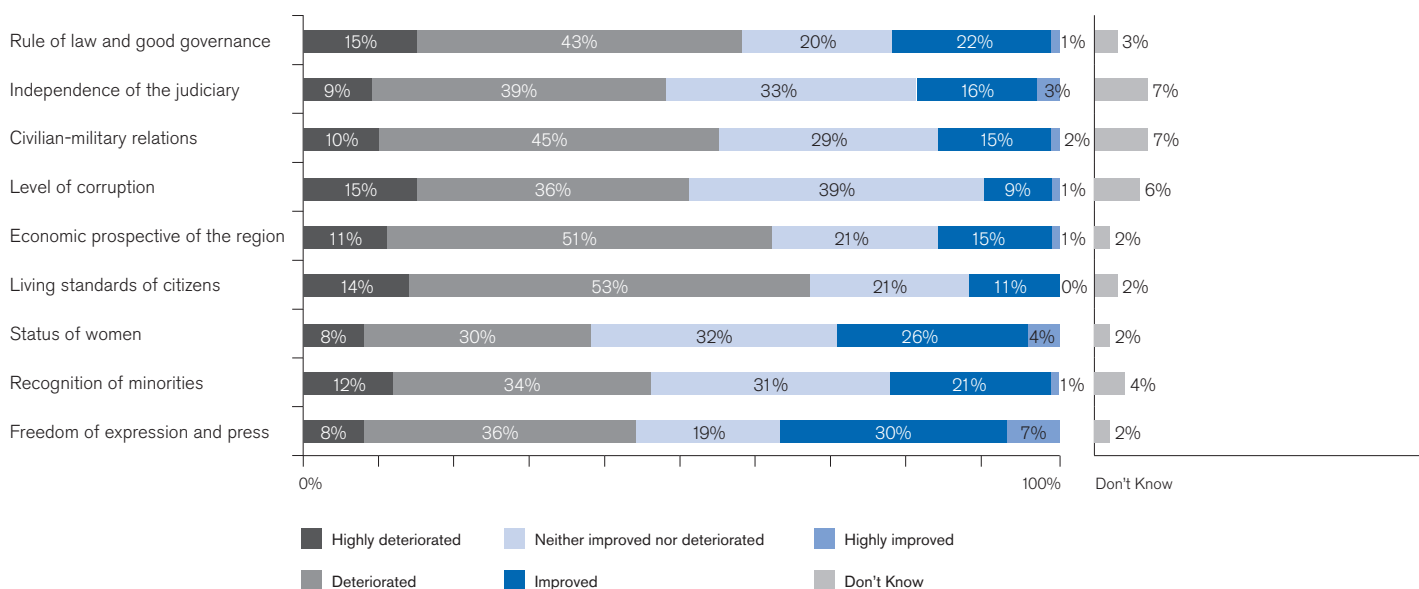
#### B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?

	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Rule of law and good governance	121 15%	346 43%	166 20%	175 22%	5 1%	813 100%	25 3%	838
Independence of the judiciary	70 9%	307 39%	261 33%	124 16%	21 3%	783 100%	55 7%	838
Civilian-military relations	77 10%	347 45%	225 29%	116 15%	13 2%	778 100%	60 7%	838
Level of corruption	117 15%	285 2%	308 4%	69 7%	8 12%	787 100%	51 6%	838
Economic prospective of the region	94 11%	418 51%	176 21%	126 15%	7 1%	821 100%	17 2%	838
Living standards of citizens	116 14%	436 53%	174 21%	90 11%	4 0%	820 100%	18 2%	838
Status of women	62 8%	247 30%	265 32%	213 26%	32 4%	819 100%	19 2%	838
Recognition of minorities	93 12%	278 34%	254 31%	171 21%	12 1%	808 100%	30 4%	838
Freedom of expression and press	66 8%	294 36%	156 19%	247 30%	58 7%	821 100%	17 2%	838

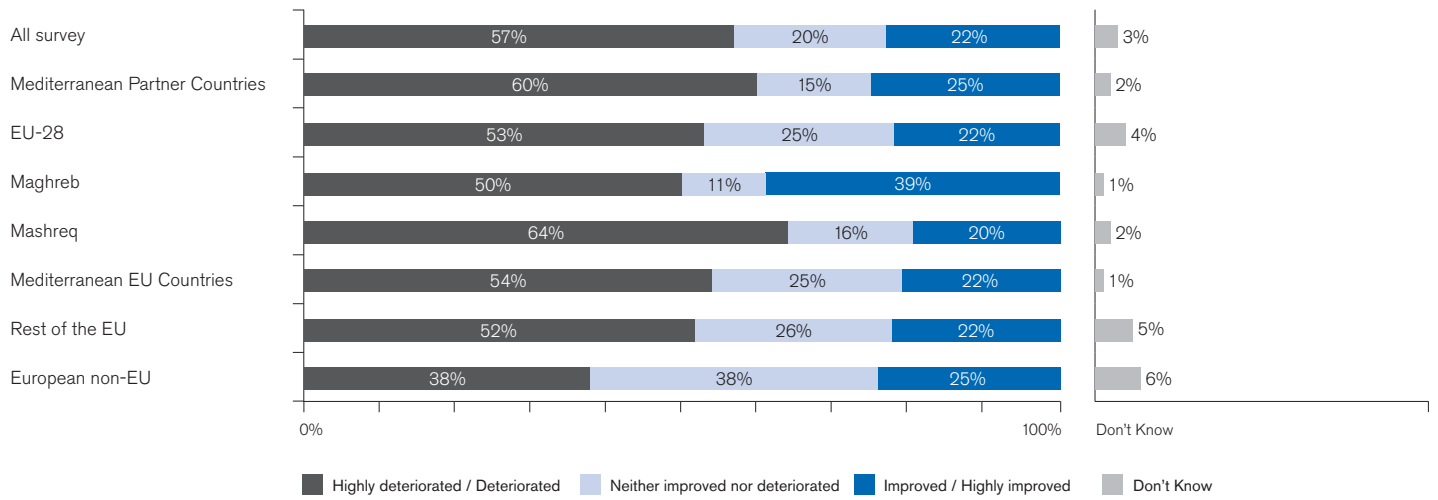
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

#### Assessing the improvement or deterioration in the last three years: SOUTHERN MEDITERRANEAN REGION



**Assessing the improvement or deterioration in the last three years in the RULE OF LAW AND GOOD GOVERNANCE; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Rule of law and good governance**

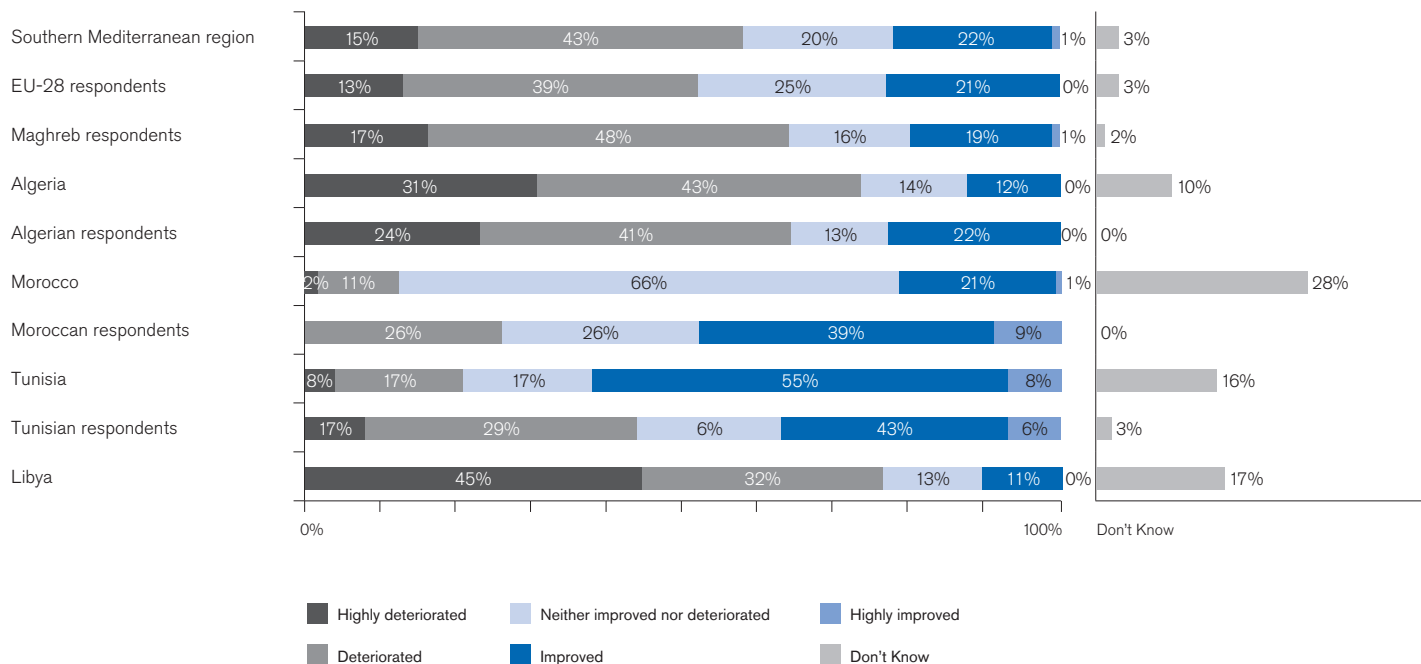
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	121	346	166	175	5	813	25	838
	15%	43%	20%	22%	1%	100%	3%	
EU-28 respondents	55	163	105	89	1	413	15	428
	13%	39%	25%	22%	0%	100%	4%	
Maghreb respondents	13	58	15	53	2	141	2	143
	9%	41%	11%	38%	1%	100%	1%	
Algeria	46	151	323	56	2	578	260	838
	8%	26%	56%	10%	0%	100%	31%	
Algerian respondents	3	17	7	16	1	44	1	45
	7%	39%	16%	36%	2%	100%	2%	
Morocco	9	53	322	261	17	662	177	839
	1%	8%	49%	39%	3%	100%	21%	
Moroccan respondents	1	6	8	26	5	46	0	46
	2%	13%	17%	57%	11%	100%	0%	
Tunisia	31	116	118	383	52	700	138	838
	4%	17%	17%	55%	8%	100%	16%	
Tunisian respondents	6	10	2	15	2	35	1	36
	17%	29%	6%	43%	6%	100%	3%	
Libya	308	219	90	74	1	692	146	838
	45%	32%	13%	11%	0%	100%	17%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: RULE OF LAW AND GOOD GOVERNANCE**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

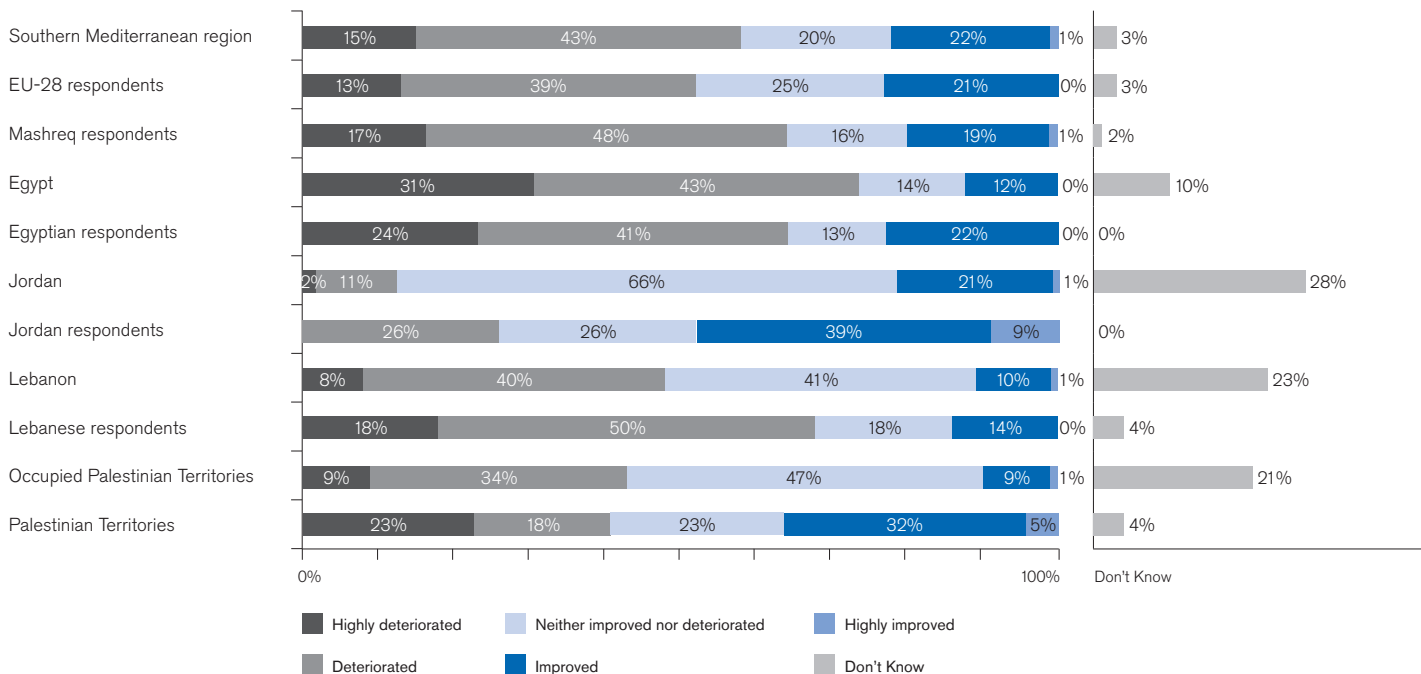
**Rule of law and good governance**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	121	346	166	175	5	813	25	838
	15%	43%	20%	22%	1%	100%	3%	
EU-28 respondents	55	163	105	89	2	414	15	429
	13%	39%	25%	21%	0%	100%	3%	
Mashreq respondents	24	69	23	28	1	145	3	148
	17%	48%	16%	19%	1%	100%	2%	
Egypt	232	322	105	92	3	754	84	838
	31%	43%	14%	12%	0%	100%	10%	
Egyptian respondents	11	19	6	10	0	46	0	46
	24%	41%	13%	22%	0%	100%	0%	
Jordan	10	64	399	125	5	603	235	838
	2%	11%	66%	21%	1%	100%	28%	
Jordan respondents	0	6	6	9	2	23	0	23
	0%	26%	26%	39%	9%	100%	0%	
Lebanon	53	257	267	65	5	647	191	838
	8%	40%	41%	10%	1%	100%	23%	
Lebanese respondents	4	11	4	3	0	22	1	23
	18%	50%	18%	14%	0%	100%	4%	
Occupied Palestinian Territories	59	223	313	62	5	662	176	838
	9%	34%	47%	9%	1%	100%	21%	
Palestinian respondents	5	4	5	7	1	22	1	23
	23%	18%	23%	32%	5%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: RULE OF LAW AND GOOD GOVERNANCE**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

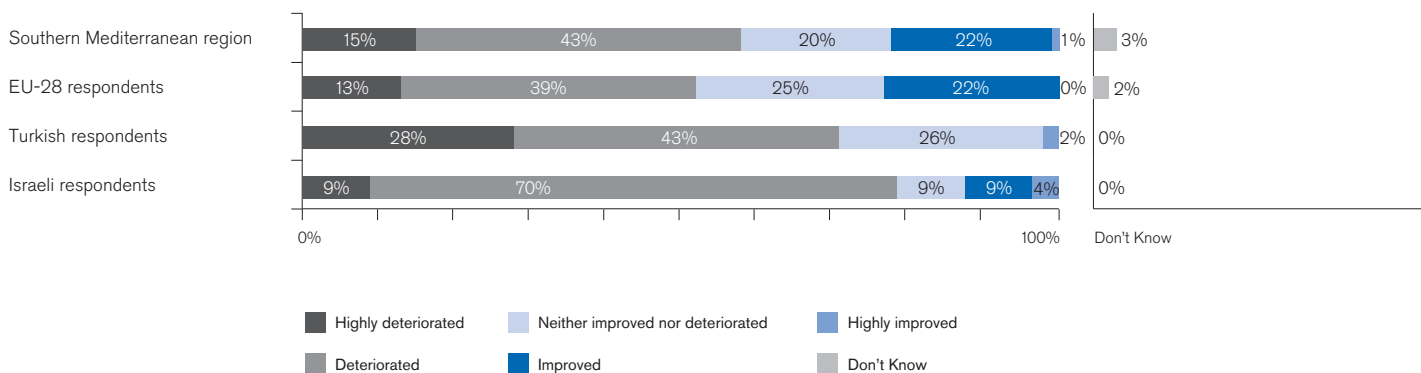
**Rule of law and good governance**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	121	346	166	175	5	813	25	838
	15%	43%	20%	22%	1%	100%	3%	
EU-28 respondents	55	163	105	89	1	413	15	838
	13%	39%	25%	22%	0%	100%	2%	
Turkish respondents	13	20	12	0	1	46	0	46
	28%	43%	26%	0%	2%	100%	0%	
Israeli respondents	2	16	2	2	1	23	0	23
	9%	70%	9%	9%	4%	100%	0%	

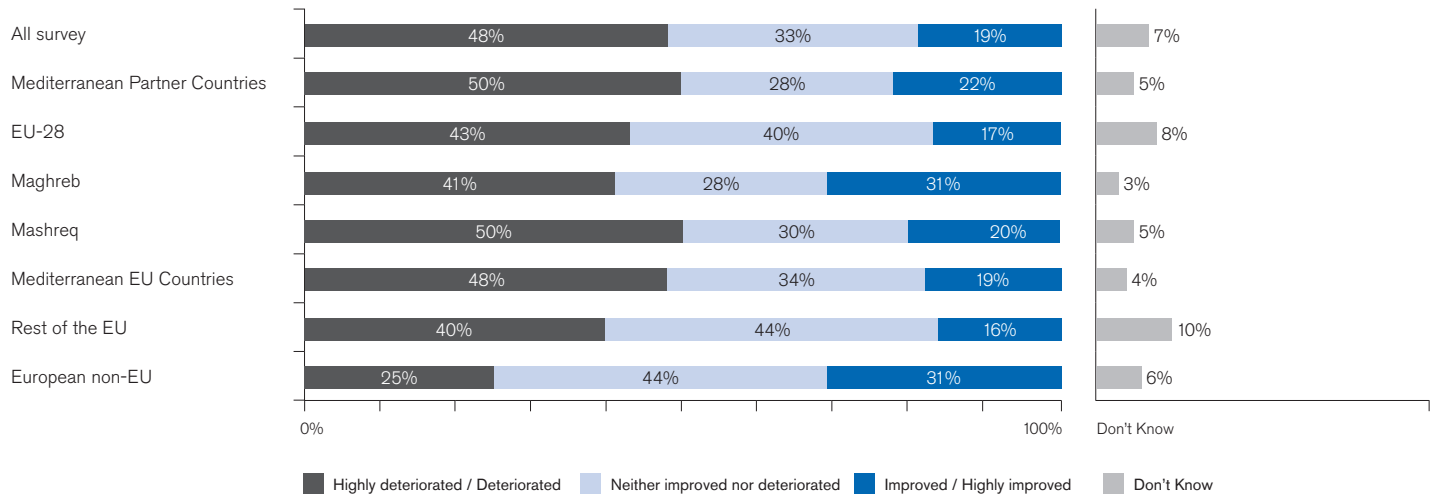
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: RULE OF LAW AND GOOD GOVERNANCE**



**Assessing the improvement or deterioration in the last three years in the INDEPENDENCE OF THE JUDICIARY; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Independence of the Judiciary**

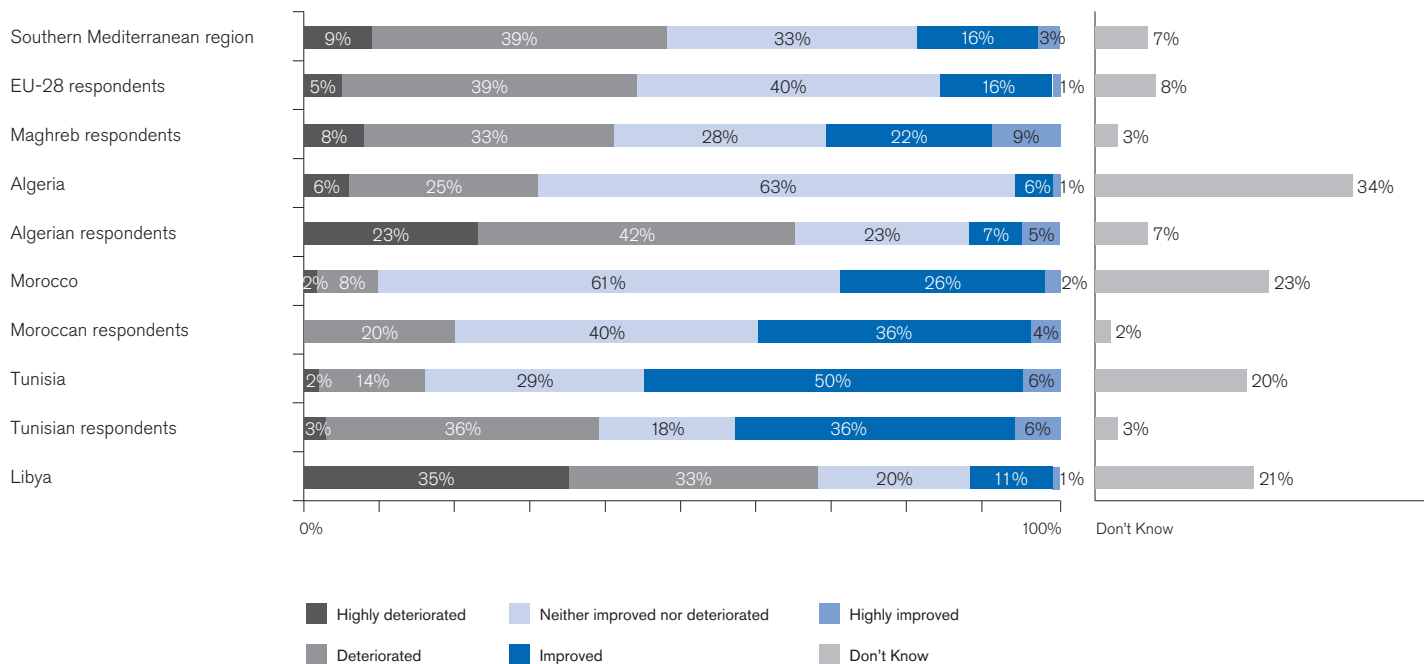
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	70	307	261	124	21	783	55	838
	9%	39%	33%	16%	13%	100%	7%	
EU-28 respondents	19	152	156	65	2	394	34	428
	5%	39%	40%	16%	1%	100%	8%	
Maghreb respondents	11	46	38	31	12	138	5	143
	8%	33%	28%	22%	9%	100%	3%	
Algeria	32	137	348	33	5	555	283	838
	6%	25%	63%	6%	1%	100%	34%	
Algerian respondents	10	18	10	3	2	43	3	46
	23%	42%	23%	7%	5%	100%	7%	
Morocco	16	54	396	168	11	645	193	838
	2%	8%	61%	26%	2%	100%	23%	
Moroccan respondents	0	9	18	16	2	45	1	46
	0%	20%	40%	36%	4%	100%	2%	
Tunisia	16	94	192	328	40	670	168	838
	2%	14%	29%	50%	6%	100%	20%	
Tunisian respondents	1	12	6	12	2	33	1	34
	3%	36%	18%	36%	6%	100%	3%	
Libya	232	220	130	75	4	661	177	838
	35%	33%	20%	11%	1%	100%	21%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: INDEPENDENCE OF THE JUDICIARY**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

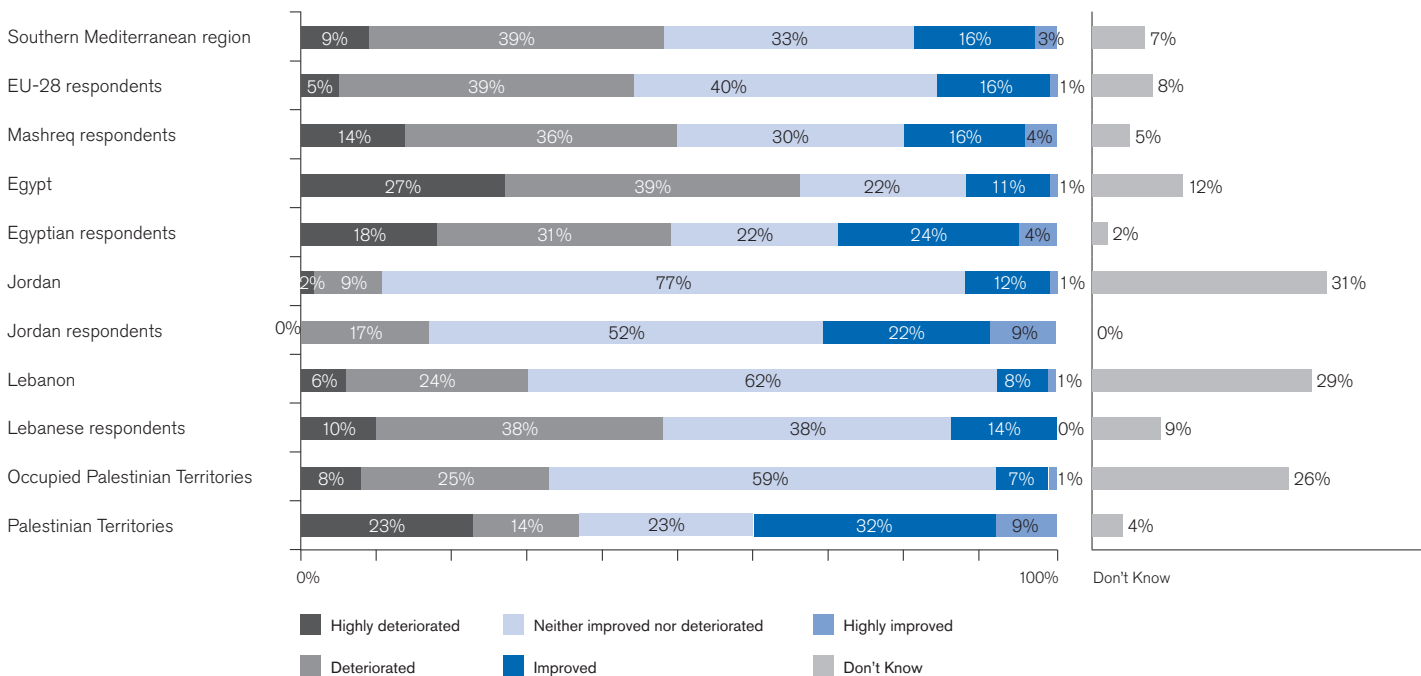
**Independence of the Judiciary**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	70	307	261	124	21	783	55	838
	9%	39%	33%	16%	3%	100%	7%	
EU-28 respondents	19	152	156	65	2	394	34	428
	5%	39%	40%	16%	1%	100%	8%	
Mashreq respondents	20	50	42	22	6	140	7	147
	14%	36%	30%	16%	4%	100%	5%	
Egypt	203	292	160	78	7	740	98	838
	27%	39%	22%	11%	1%	100%	12%	
Egyptian respondents	8	14	10	11	2	45	1	46
	18%	31%	22%	24%	4%	100%	2%	
Jordan	10	49	441	71	5	576	262	838
	2%	9%	77%	12%	1%	100%	31%	
Jordan respondents	0	4	12	5	2	23	0	23
	0%	17%	52%	22%	9%	100%	0%	
Lebanon	34	141	369	48	4	596	242	838
	6%	24%	62%	8%	1%	100%	29%	
Lebanese respondents	2	8	8	3	0	21	2	23
	10%	38%	38%	14%	0%	100%	9%	
Occupied Palestinian Territories	51	154	370	44	5	624	214	838
	8%	25%	59%	7%	1%	100%	26%	
Palestinian respondents	5	3	5	7	2	22	1	23
	23%	14%	23%	32%	9%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: INDEPENDENCE OF THE JUDICIARY**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

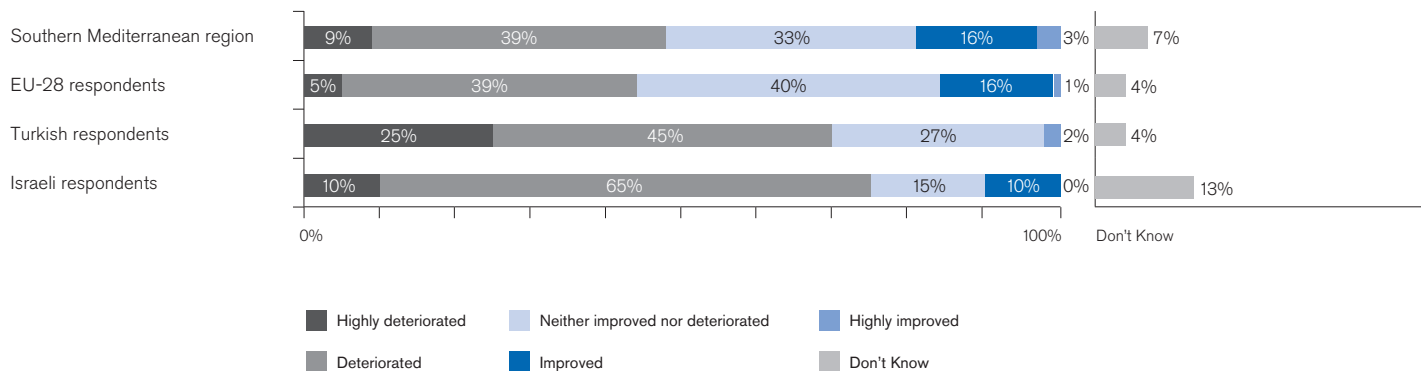
**Independence of the Judiciary**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	70	307	261	124	21	<b>783</b>	55	838
	9%	39%	33%	16%	3%	<b>100%</b>	7%	
EU-28 respondents	19	153	156	65	2	<b>394</b>	34	838
	5%	39%	40%	16%	1%	<b>100%</b>	4%	
Turkish respondents	11	20	12	0	1	<b>44</b>	2	46
	25%	45%	27%	0%	2%	<b>100%</b>	4%	
Israeli respondents	2	13	3	2	0	<b>20</b>	3	23
	10%	65%	15%	10%	0%	<b>100%</b>	13%	

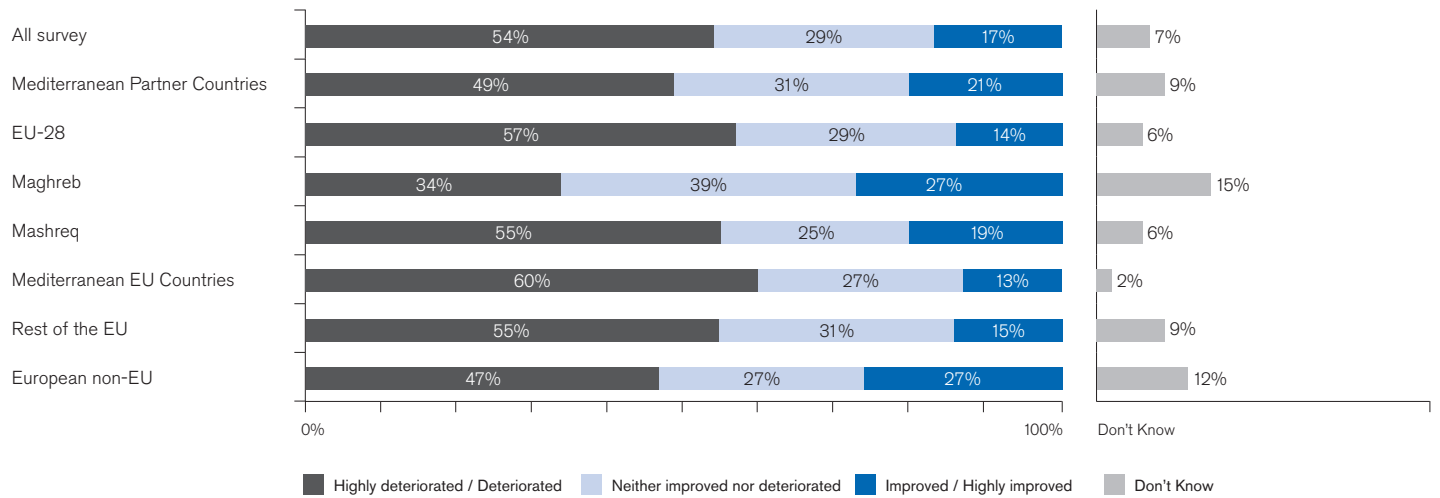
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: INDEPENDENCE OF THE JUDICIARY**



**Assessing the improvement or deterioration in the last three years in CIVILIAN-MILITARY RELATIONS; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Civilian-military relations**

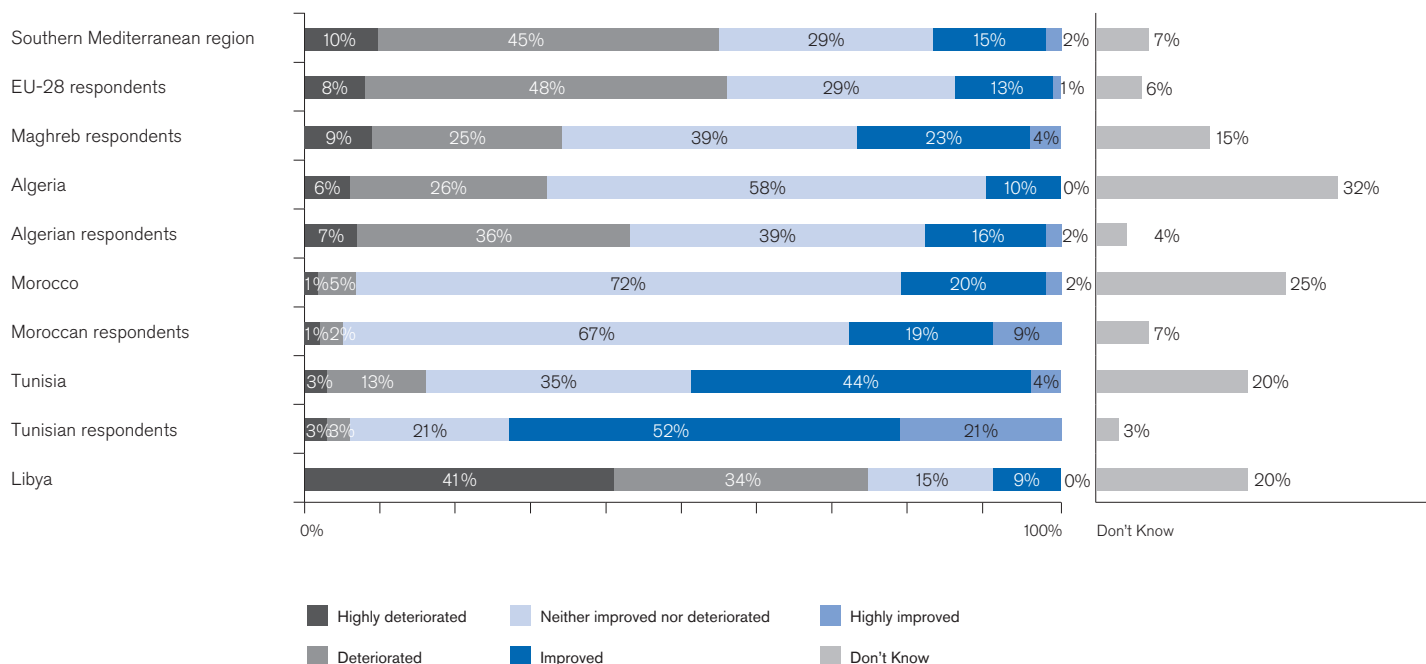
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	77 10%	347 45%	225 29%	116 15%	13 2%	778 100%	60 7%	838
EU-28 respondents	34 8%	195 48%	117 29%	54 13%	3 1%	403 100%	25 6%	428
Maghreb respondents	11 9%	30 25%	47 39%	28 23%	5 4%	121 100%	22 15%	143
Algeria	35 6%	147 26%	328 58%	56 10%	0 0%	566 100%	272 32%	838
Algerian respondents	3 7%	16 36%	17 39%	7 16%	1 2%	44 100%	2 4%	46
Morocco	8 1%	31 5%	452 72%	127 20%	14 2%	632 100%	206 25%	838
Moroccan respondents	1 2%	1 2%	29 67%	8 19%	4 9%	43 100%	3 7%	46
Tunisia	20 3%	85 13%	233 35%	299 44%	30 4%	667 99%	171 20%	838
Tunisian respondents	1 3%	1 3%	7 21%	17 52%	7 21%	33 100%	1 3%	34
Libya	275 41%	230 34%	104 15%	64 9%	1 0%	674 100%	164 20%	838

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: CIVILIAN-MILITARY RELATIONS**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

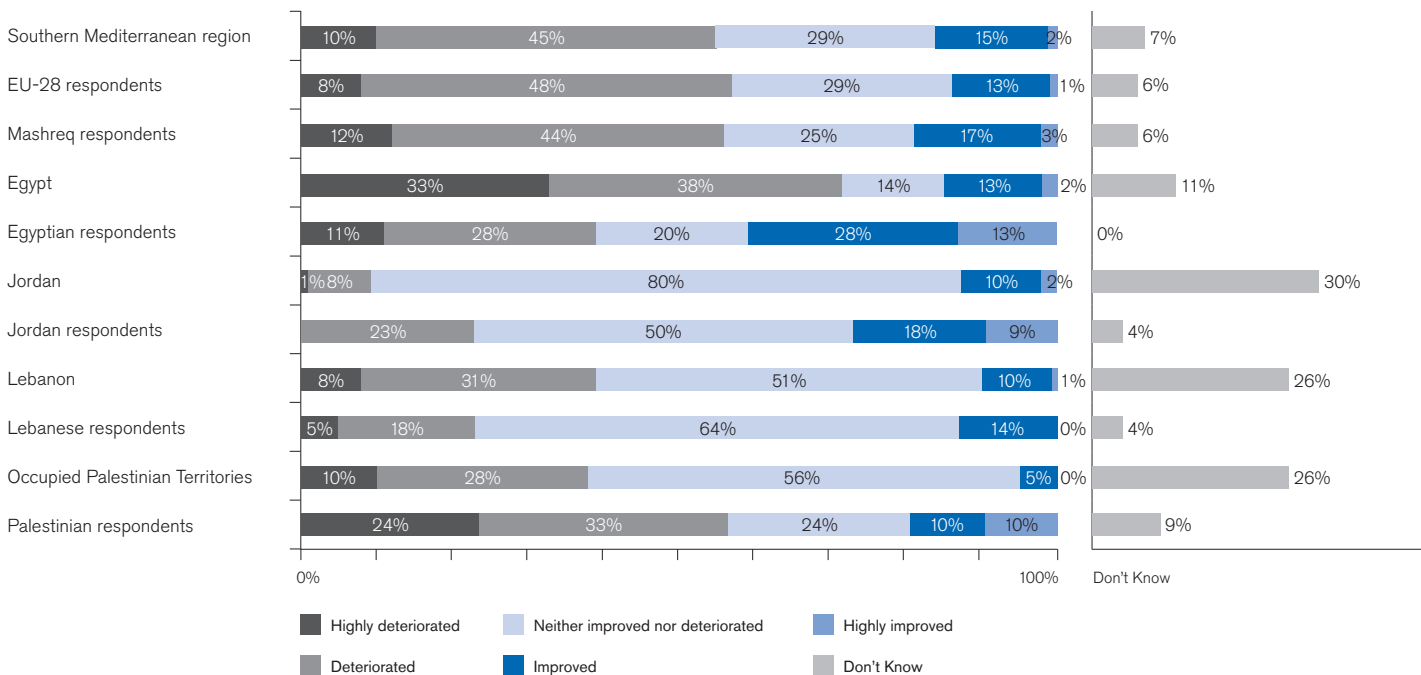
**Civilian-military relations**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	77	347	225	116	13	778	60	838
	10%	45%	29%	15%	2%	100%	7%	
EU-28 respondents	34	195	117	54	3	403	25	428
	8%	48%	29%	13%	1%	100%	6%	
Mashreq respondents	16	61	35	23	4	139	9	148
	12%	44%	25%	17%	3%	100%	6%	
Egypt	244	286	102	100	14	746	92	838
	33%	38%	14%	13%	2%	100%	11%	
Egyptian respondents	5	13	9	13	6	46	0	46
	11%	28%	20%	28%	13%	100%	0%	
Jordan	8	44	468	57	9	586	252	838
	1%	8%	80%	10%	2%	100%	30%	
Jordan respondents	0	5	11	4	2	22	1	23
	0%	23%	50%	18%	9%	100%	4%	
Lebanon	47	191	313	62	5	618	220	838
	8%	31%	51%	10%	1%	100%	26%	
Lebanese respondents	1	4	14	3	0	22	1	23
	5%	18%	64%	14%	0%	100%	4%	
Occupied Palestinian Territories	65	174	347	32	3	621	217	838
	10%	28%	56%	5%	0%	100%	26%	
Palestinian respondents	5	7	5	2	2	21	2	23
	24%	33%	24%	10%	10%	100%	9%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: CIVILIAN-MILITARY RELATIONS**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

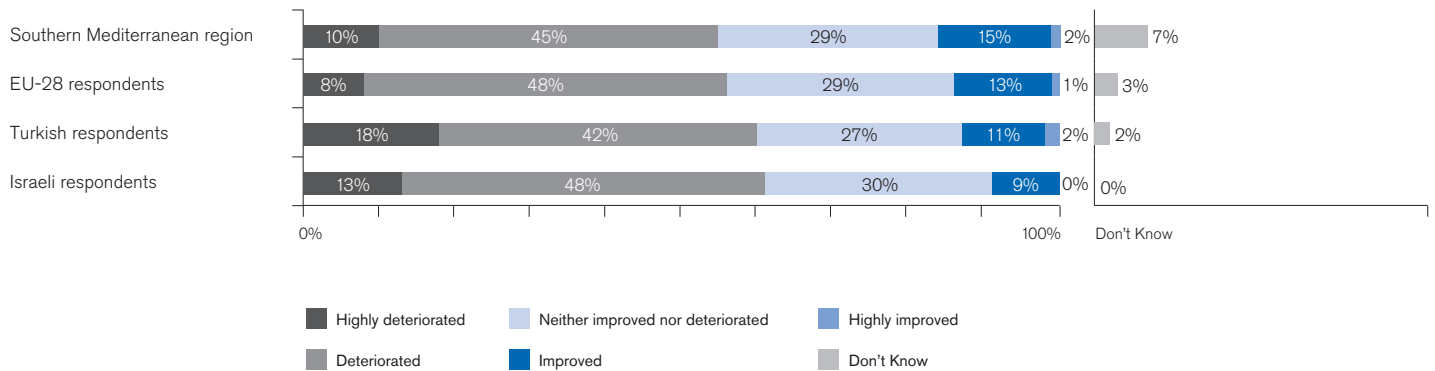
**Civilian-military relations**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	77	347	255	116	13	778	60	838
	10%	45%	29%	15%	2%	100%	7%	
EU-28 respondents	34	195	117	54	3	403	25	838
	8%	48%	29%	13%	1%	100%	3%	
Turkish respondents	8	19	12	5	1	45	1	46
	18%	42%	27%	11%	2%	100%	2%	
Israeli respondents	3	11	7	2	0	23	0	23
	13%	48%	30%	9%	0%	100%	0%	

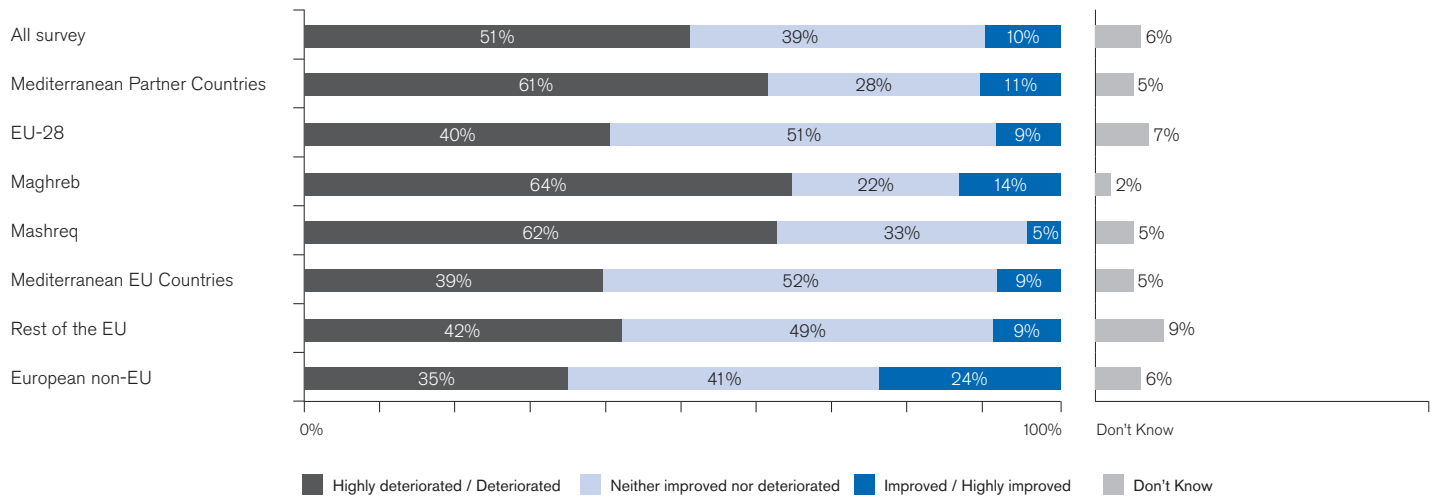
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: CIVILIAN-MILITARY RELATIONS**



**Assessing the improvement or deterioration in the last three years in the LEVEL OF CORRUPTION; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Level of corruption**

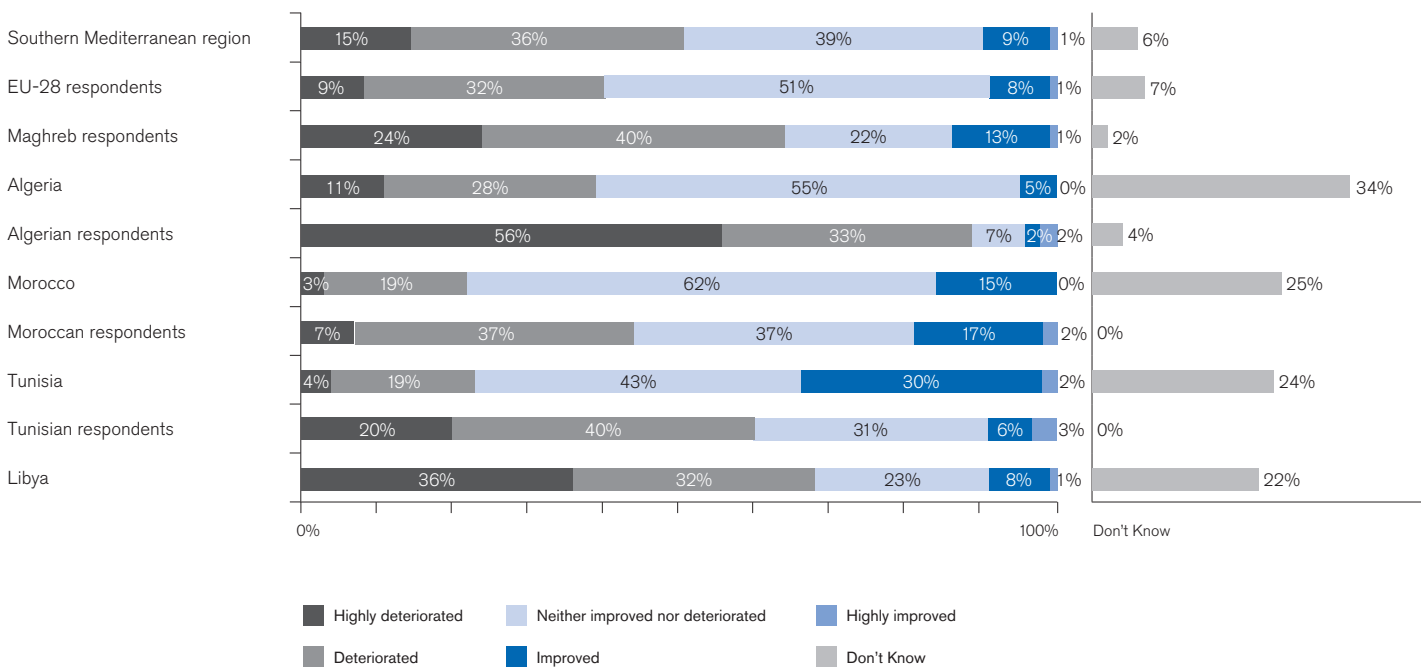
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	117	285	308	69	8	787	51	838
	15%	36%	39%	9%	1%	100%	6%	
EU-28 respondents	34	126	200	33	3	396	32	428
	9%	32%	51%	8%	1%	100%	7%	
Maghreb respondents	33	56	31	18	1	139	3	142
	24%	40%	22%	13%	1%	100%	2%	
Algeria	61	156	305	28	2	552	286	838
	11%	28%	55%	5%	0%	100%	34%	
Algerian respondents	24	14	3	1	1	43	2	45
	56%	33%	7%	2%	2%	100%	4%	
Morocco	17	122	390	95	2	626	212	838
	3%	19%	62%	15%	0%	100%	25%	
Moroccan respondents	3	17	17	8	1	46	0	46
	7%	37%	37%	17%	2%	100%	0%	
Tunisia	26	125	282	195	10	638	199	837
	4%	19%	43%	30%	2%	100%	24%	
Tunisian respondents	7	14	11	2	1	35	0	35
	20%	40%	31%	6%	3%	100%	0%	
Libya	235	211	150	52	6	654	185	839
	36%	32%	23%	8%	1%	100%	22%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: LEVEL OF CORRUPTION**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

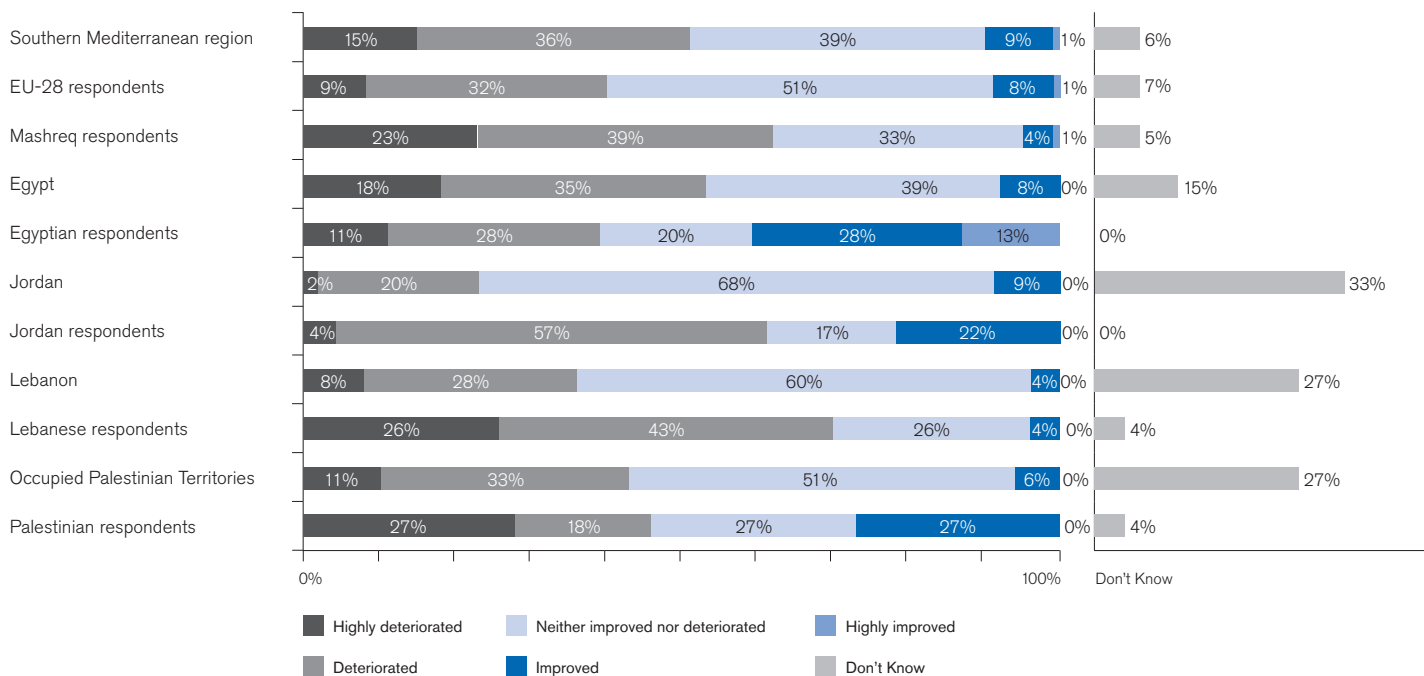
**Level of corruption**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	117	285	308	69	8	787	51	838
	15%	36%	39%	9%	1%	100%	6%	
EU-28 respondents	34	126	200	33	3	396	32	428
	9%	32%	51%	8%	1%	100%	7%	
Mashreq respondents	32	55	47	6	1	141	7	148
	23%	39%	33%	4%	1%	100%	5%	
Egypt	128	245	275	58	3	709	129	838
	18%	35%	39%	8%	0%	100%	15%	
Egyptian respondents	5	13	9	13	6	46	0	46
	11%	28%	20%	28%	13%	100%	0%	
Jordan	13	115	379	53	1	561	277	838
	2%	20%	68%	9%	0%	100%	33%	
Jordan respondents	1	13	4	5	0	23	0	23
	4%	57%	17%	22%	0%	100%	0%	
Lebanon	48	171	364	26	2	611	227	838
	8%	28%	60%	4%	0%	100%	27%	
Lebanese respondents	6	10	6	1	0	23	1	24
	26%	43%	26%	4%	0%	100%	4%	
Occupied Palestinian Territories	66	200	311	34	3	614	224	838
	11%	33%	51%	6%	0%	100%	27%	
Palestinian respondents	6	4	6	6	0	22	1	23
	27%	18%	27%	27%	0%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: LEVEL OF CORRUPTION**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

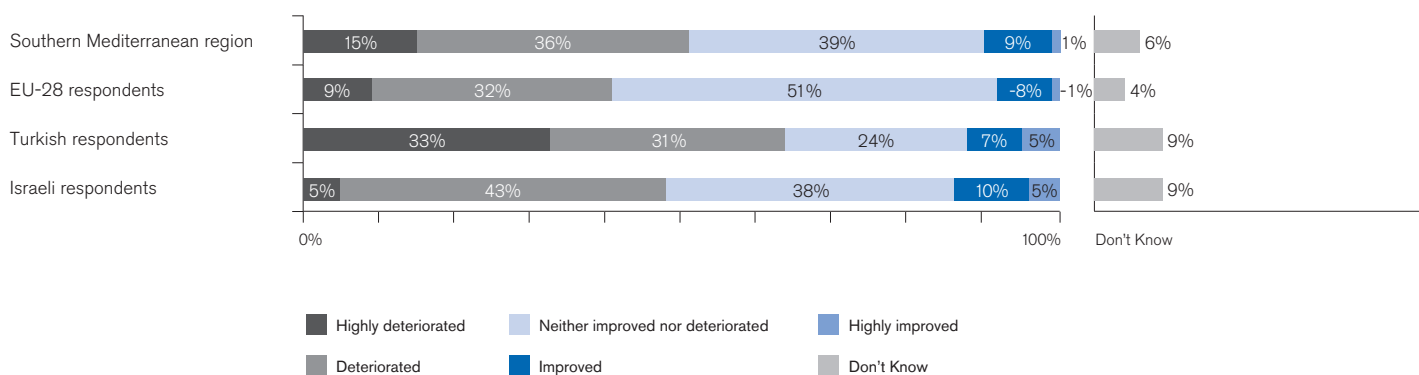
**Level of corruption**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	117	285	308	69	8	787	51	838
	15%	36%	39%	9%	1%	100%	6%	
EU-28 respondents	34	126	200	33	3	396	32	838
	9%	32%	51%	8%	1%	100%	4%	
Turkish respondents	14	13	10	3	2	42	4	46
	33%	31%	24%	7%	5%	100%	9%	
Israeli respondents	1	9	8	2	1	21	2	23
	5%	43%	38%	10%	5%	100%	9%	

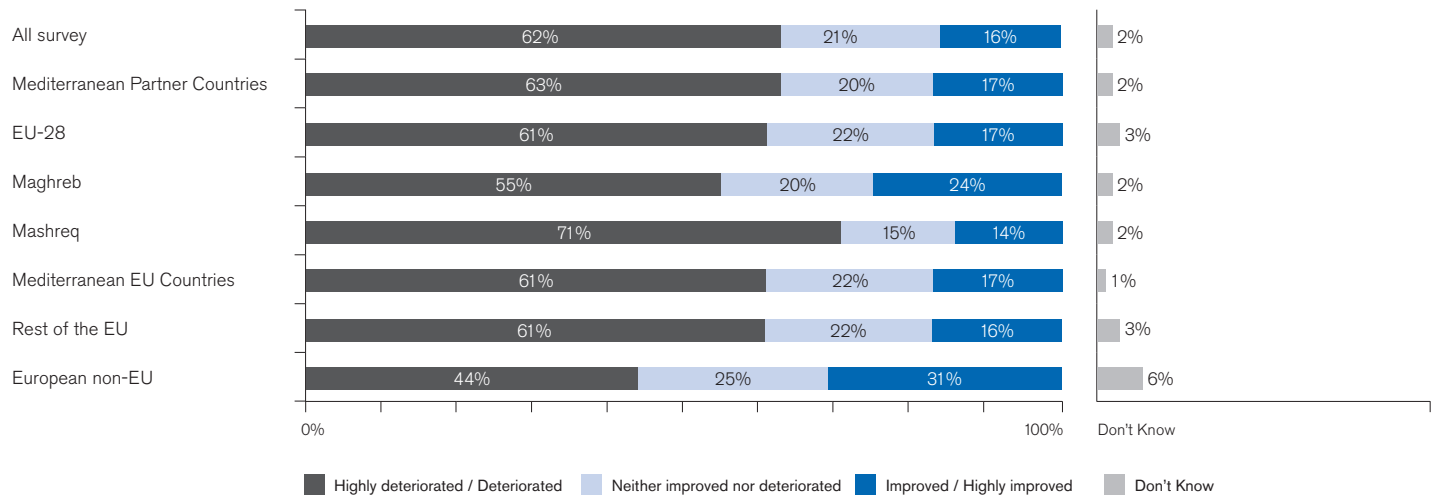
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: LEVEL OF CORRUPTION**



**Assessing the improvement or deterioration in the last three years of the ECONOMIC PROSPECTIVE OF THE REGION; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Economic prospective of the region**

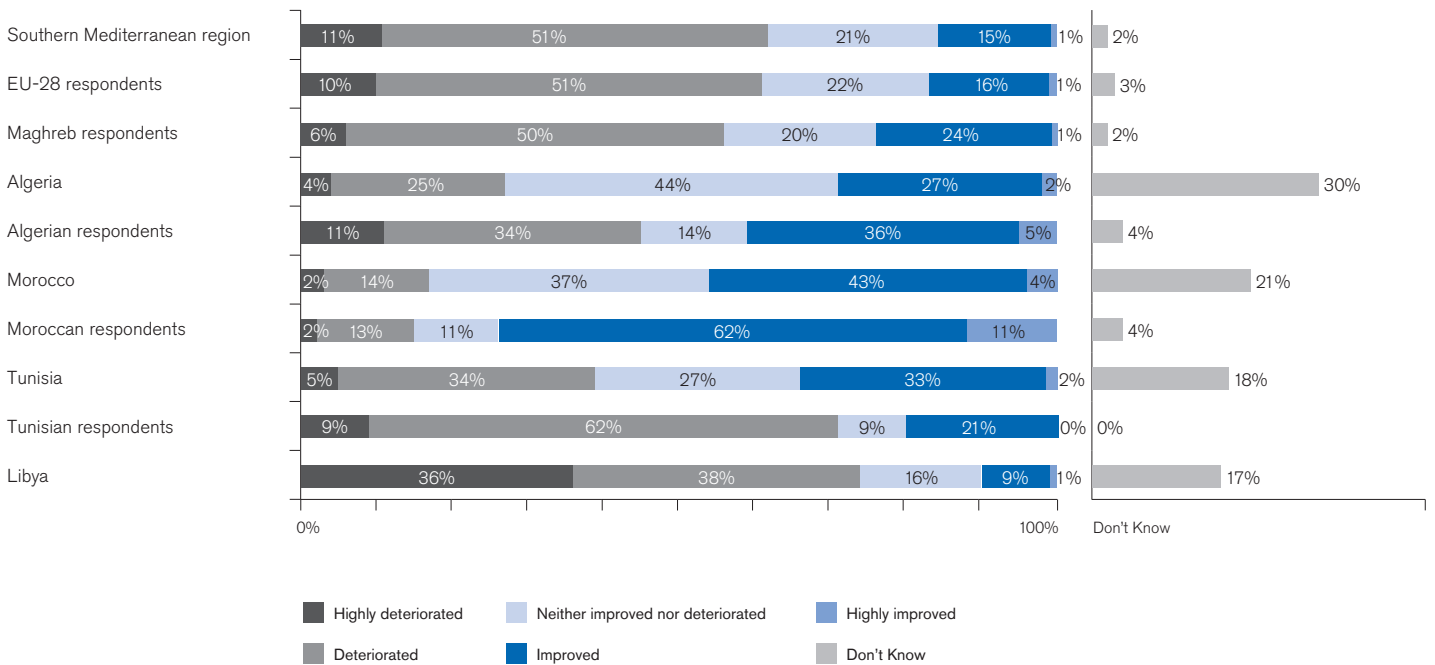
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	94	418	176	126	7	821	17	838
	11%	51%	21%	15%	1%	100%	2%	
EU-28 respondents	42	213	93	65	4	417	11	428
	10%	51%	22%	16%	1%	100%	3%	
Maghreb respondents	8	69	28	33	1	139	3	142
	6%	50%	20%	24%	1%	100%	2%	
Algeria	21	143	254	156	9	583	255	838
	4%	25%	44%	27%	2%	100%	30%	
Algerian respondents	5	15	6	16	2	44	2	46
	11%	34%	14%	36%	5%	100%	4%	
Morocco	11	92	246	288	28	665	173	38
	2%	14%	37%	43%	4%	100%	21%	
Moroccan respondents	1	6	5	28	5	45	1	46
	2%	13%	11%	62%	11%	100%	2%	
Tunisia	36	232	184	226	13	691	147	838
	5%	34%	27%	33%	2%	100%	18%	
Tunisian respondents	3	21	3	7	0	34	0	34
	9%	62%	9%	21%	0%	100%	0%	
Libya	250	261	112	65	4	692	146	838
	36%	38%	16%	9%	1%	100%	17%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: ECONOMIC PROSPECTIVE OF THE REGION**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

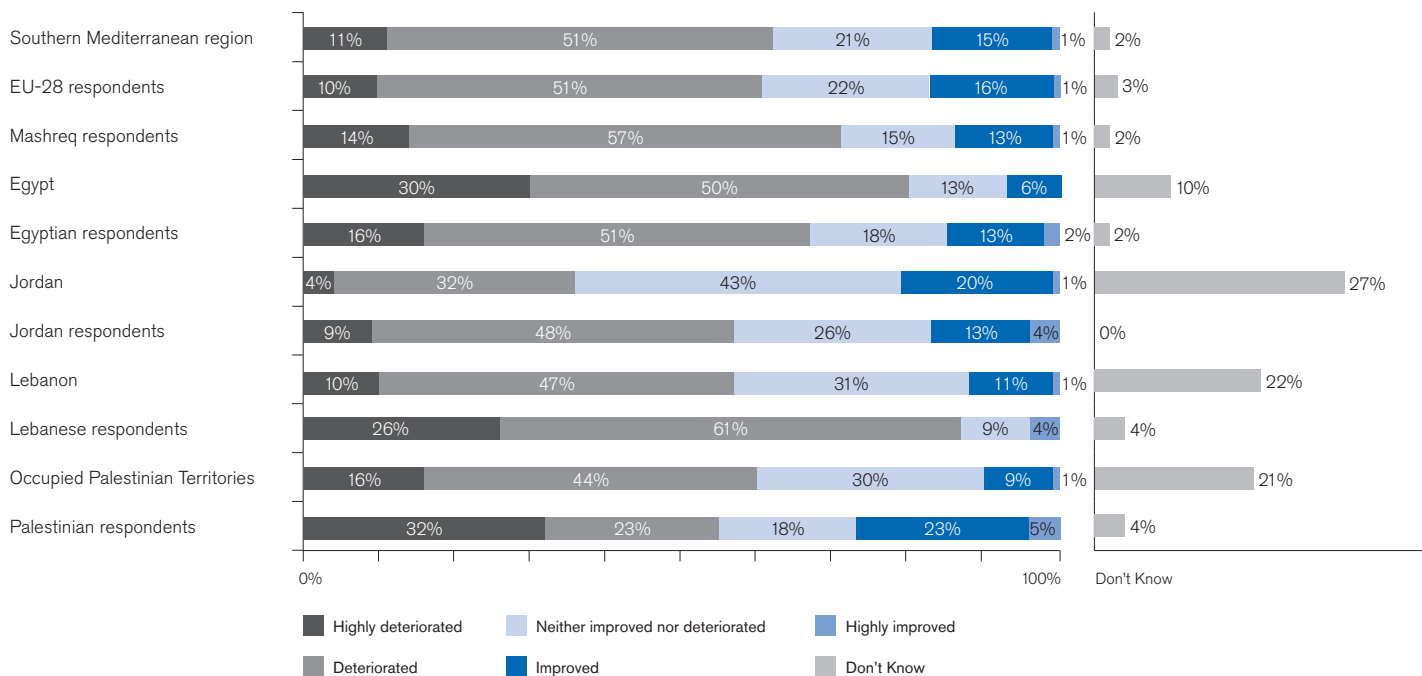
**Economic prospective of the region**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	94	418	176	126	7	821	17	838
	11%	51%	21%	15%	1%	100%	2%	
EU-28 respondents	42	213	93	65	4	417	11	428
	10%	51%	22%	16%	1%	100%	3%	
Mashreq respondents	20	82	22	18	2	144	3	147
	14%	57%	15%	13%	1%	100%	2%	
Egypt	227	372	100	47	5	751	87	838
	30%	50%	13%	6%	1%	100%	10%	
Egyptian respondents	7	23	8	6	1	45	1	46
	16%	51%	18%	13%	2%	100%	2%	
Jordan	25	196	262	124	4	611	227	838
	4%	32%	43%	20%	1%	100%	27%	
Jordan respondents	2	11	6	3	1	23	0	23
	9%	48%	26%	13%	4%	100%	0%	
Lebanon	64	311	204	73	5	657	181	838
	10%	47%	31%	11%	1%	100%	22%	
Lebanese respondents	6	14	2	0	1	23	1	24
	26%	61%	9%	0%	4%	100%	4%	
Occupied Palestinian Territories	109	291	200	57	5	662	176	838
	16%	44%	30%	9%	1%	100%	21%	
Palestinian respondents	7	5	4	5	1	22	1	23
	32%	23%	18%	23%	5%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: ECONOMIC PROSPECTIVE OF THE REGION**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

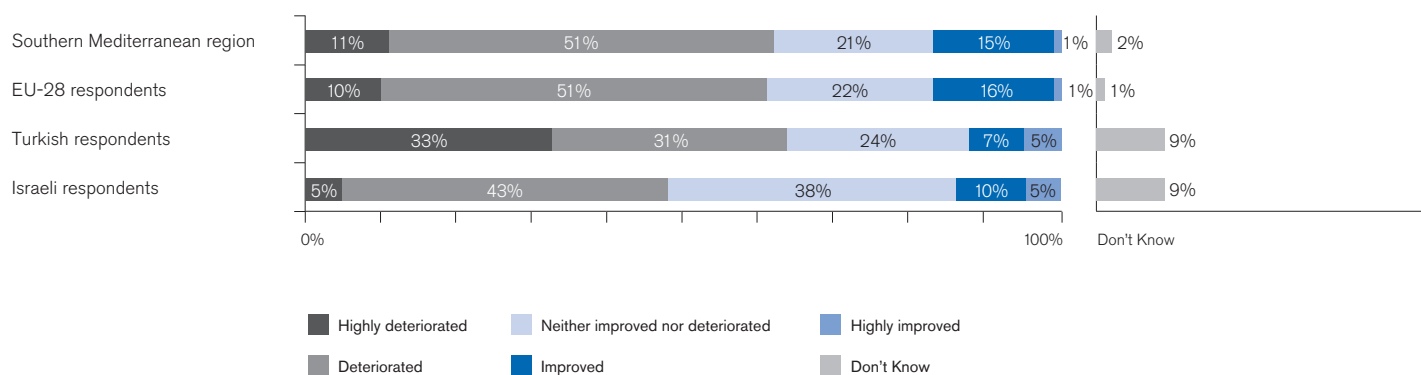
**Economic prospective of the region**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	94	418	176	126	7	821	17	838
	11%	51%	21%	15%	1%	100%	2%	
EU-28 respondents	42	213	93	65	4	417	11	838
	10%	51%	22%	16%	1%	100%	1%	
Turkish respondents	14	13	10	3	2	42	4	46
	33%	31%	24%	7%	5%	100%	9%	
Israeli respondents	1	9	8	2	1	21	2	23
	5%	43%	38%	10%	5%	100%	9%	

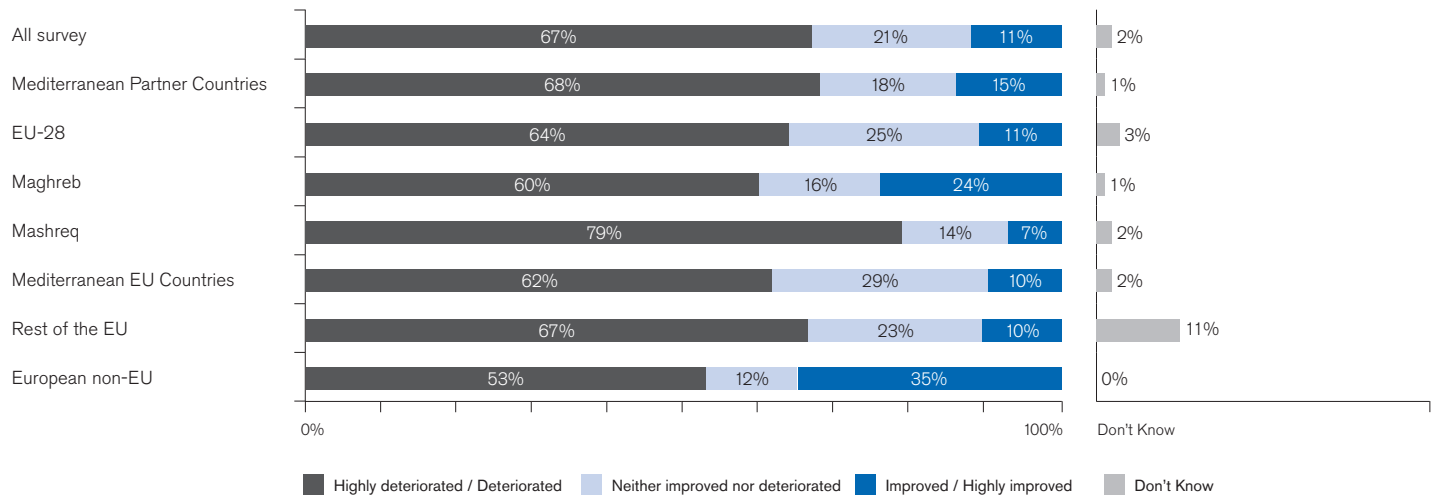
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: ECONOMIC PROSPECTIVE OF THE REGION**



**Assessing the improvement or deterioration in the last three years of the LIVING STANDARDS OF CITIZENS; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Living standards of citizens**

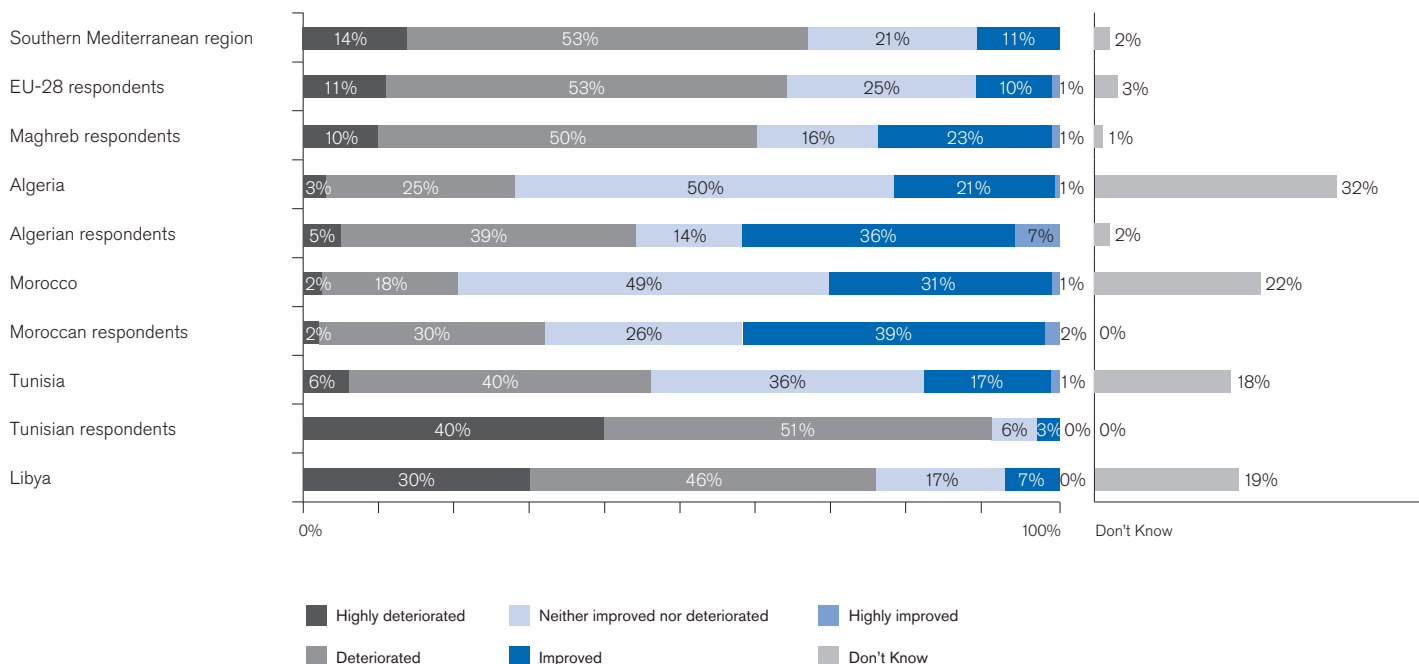
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	116	436	174	90	4	820	18	838
	14%	53%	21%	11%	0%	100%	2%	
EU-28 respondents	46	220	105	40	4	415	13	428
	11%	53%	25%	10%	1%	100%	3%	
Maghreb respondents	14	71	22	33	1	141	1	142
	10%	50%	16%	23%	1%	100%	1%	
Algeria	18	144	285	119	8	574	264	838
	3%	25%	50%	21%	1%	100%	32%	
Algerian respondents	2	17	6	16	3	44	1	45
	5%	39%	14%	36%	7%	100%	2%	
Morocco	12	116	320	204	5	657	181	838
	2%	18%	49%	31%	1%	100%	22%	
Moroccan respondents	1	14	12	18	1	46	0	46
	2%	30%	26%	39%	2%	100%	0%	
Tunisia	44	274	245	113	9	685	153	838
	6%	40%	36%	17%	1%	100%	18%	
Tunisian respondents	14	18	2	1	0	35	0	35
	40%	51%	6%	3%	0%	100%	0%	
Libya	202	310	117	48	3	680	158	838
	30%	46%	17%	7%	0%	100%	19%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: LIVING STANDARDS OF CITIZENS**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

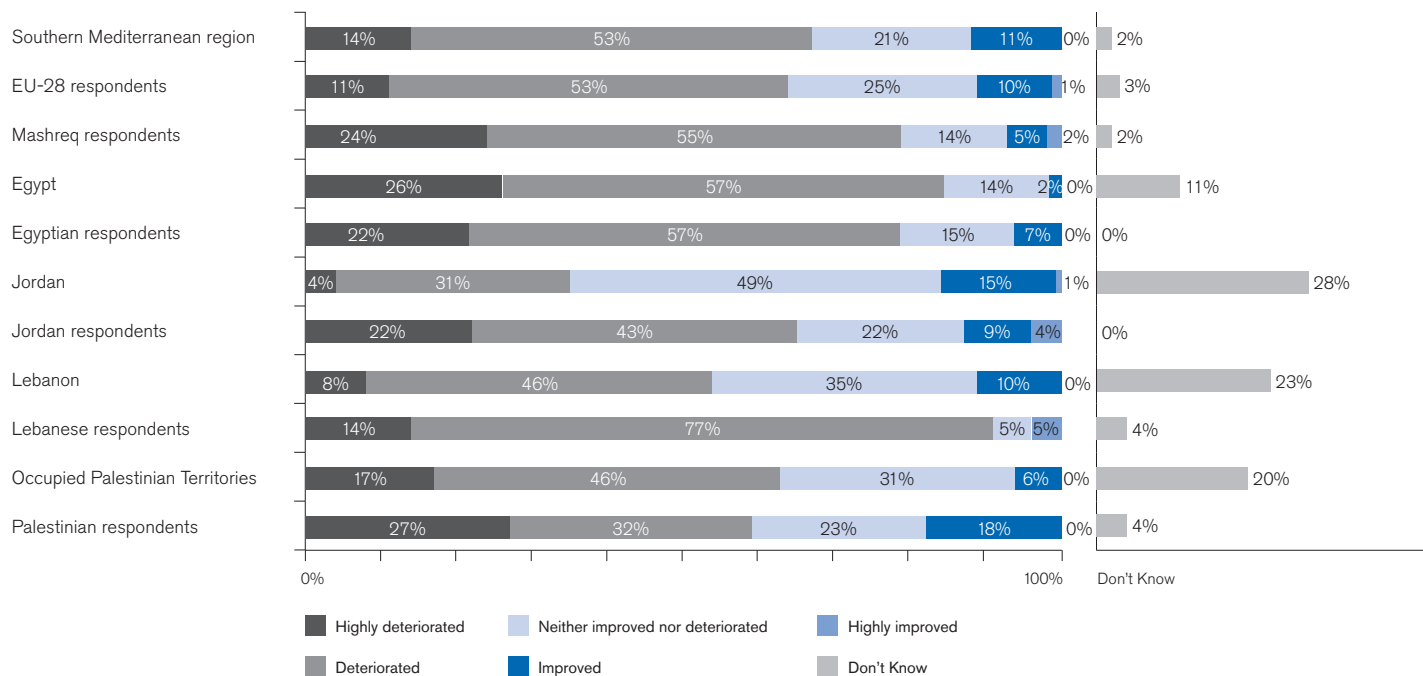
**Living standards of citizens**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	116 14%	436 53%	174 21%	90 11%	4 0%	820 100%	18 2%	838
EU-28 respondents	46 11%	220 53%	105 25%	40 10%	4 1%	415 100%	13 3%	428
Mashreq respondents	35 24%	80 55%	20 14%	7 5%	3 2%	145 100%	3 2%	148
Egypt	193 26%	425 57%	108 14%	18 2%	3 0%	747 100%	91 11%	838
Egyptian respondents	10 22%	26 57%	7 15%	3 7%	0 0%	46 100%	0 0%	46
Jordan	26 4%	187 31%	297 49%	89 15%	4 1%	603 100%	235 28%	838
Jordan respondents	5 22%	10 43%	5 22%	2 9%	1 4%	23 100%	0 0%	23
Lebanon	50 8%	300 46%	229 35%	66 10%	2 0%	647 100%	191 23%	838
Lebanese respondents	3 14%	17 77%	1 5%	1 5%	0 0%	22 100%	1 4%	23
Occupied Palestinian Territories	113 17%	305 46%	208 31%	42 6%	2 0%	670 100%	168 20%	838
Palestinian respondents	6 27%	7 32%	5 23%	4 18%	0 0%	22 100%	1 4%	23

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: LIVING STANDARDS OF CITIZENS**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

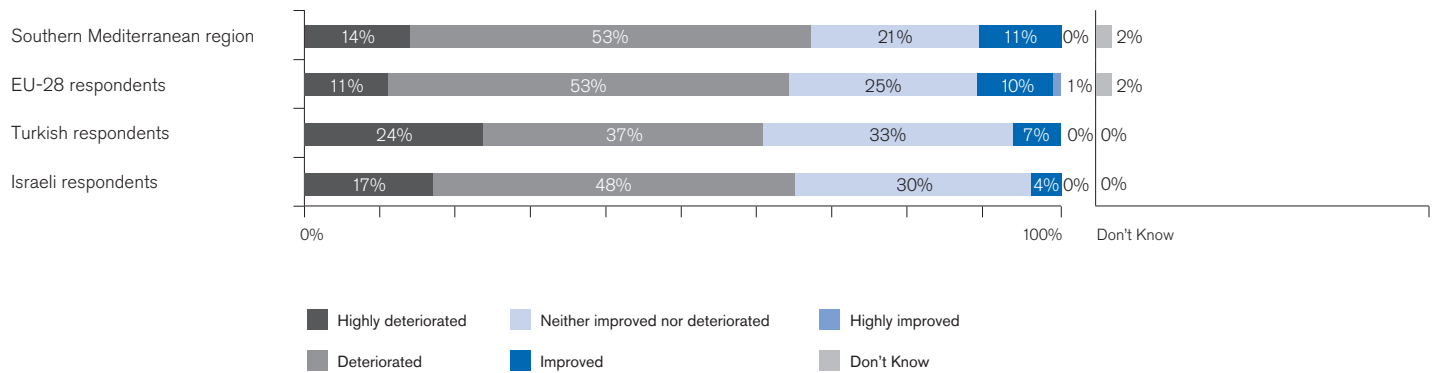
**Living standards of citizens**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	116	436	174	90	4	820	18	838
	14%	53%	21%	11%	0%	100%	2%	
EU-28 respondents	46	220	105	40	4	415	13	838
	11%	53%	25%	10%	1%	100%	2%	
Turkish respondents	11	17	15	3	0	46	0	46
	24%	37%	33%	7%	0%	100%	0%	
Israeli respondents	4	11	7	1	0	23	0	23
	17%	48%	30%	4%	0%	100%	0%	

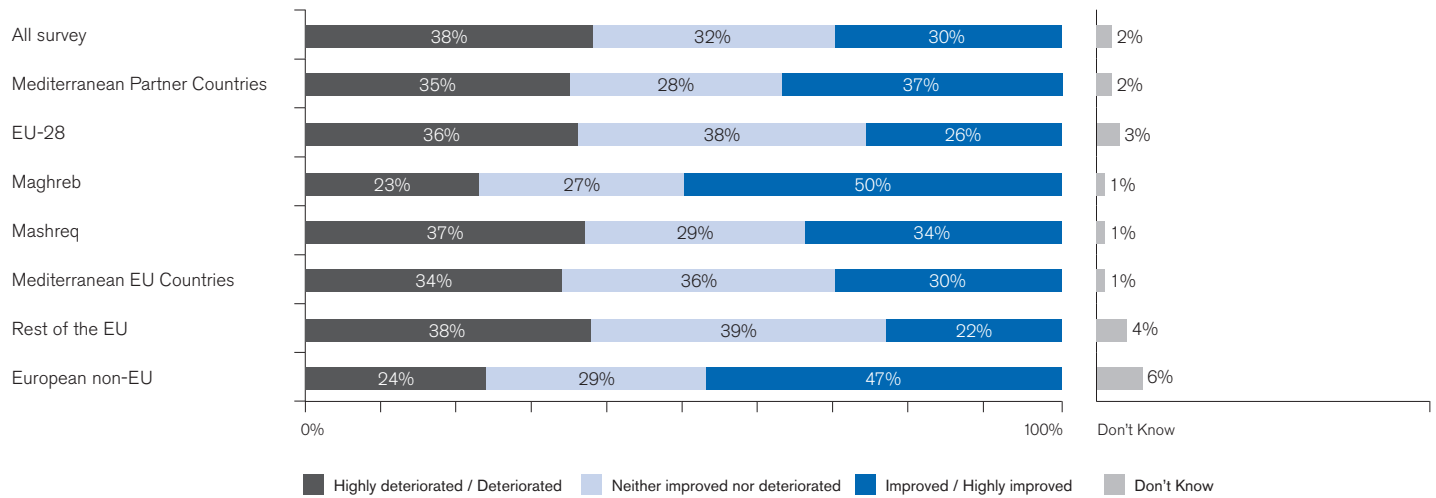
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: LIVING STANDARDS OF CITIZENS**



**Assessing the improvement or deterioration in the last three years of the STATUS OF WOMEN; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Status of women**

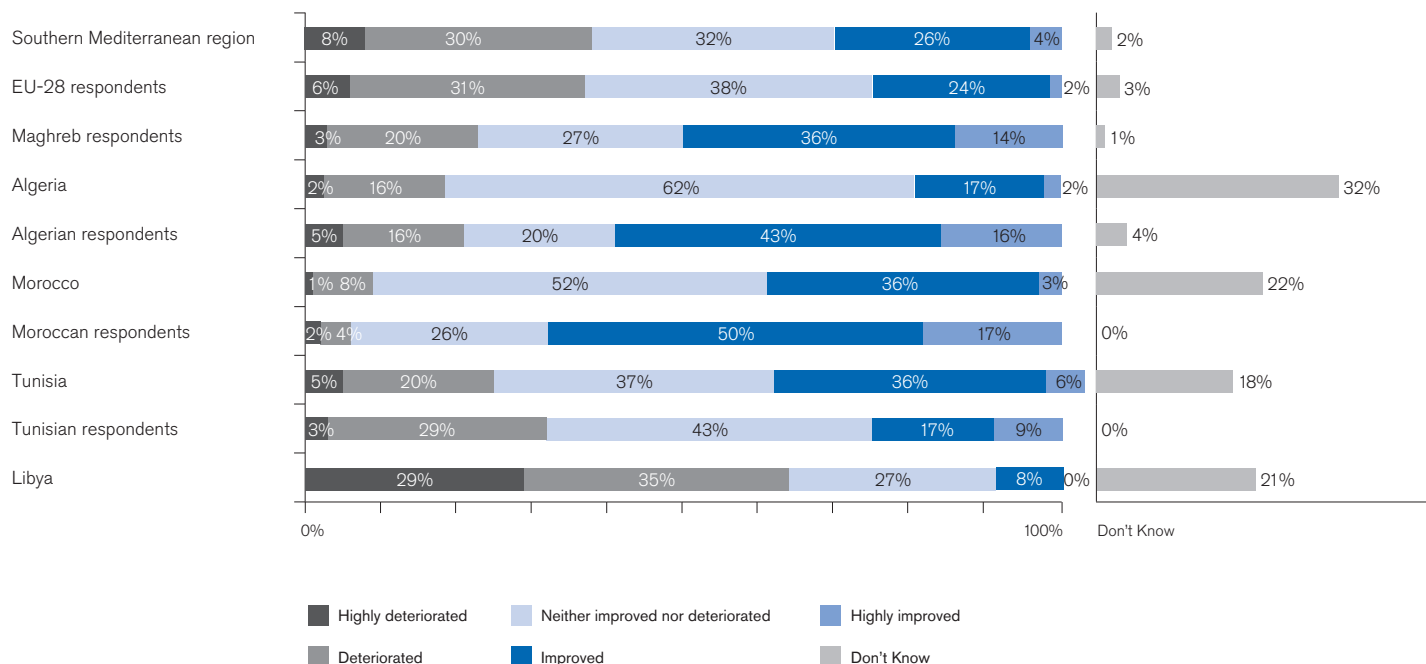
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	62	247	265	213	32	819	19	838
	8%	30%	32%	26%	4%	100%	2%	
EU-28 respondents	23	128	157	99	7	414	13	427
	6%	31%	38%	24%	2%	100%	3%	
Maghreb respondents	4	28	38	51	20	141	2	143
	3%	20%	27%	36%	14%	100%	1%	
Algeria	14	94	354	99	11	572	266	838
	2%	16%	62%	17%	2%	100%	32%	
Algerian respondents	2	7	9	19	7	44	2	46
	5%	16%	20%	43%	16%	100%	4%	
Morocco	7	54	340	236	18	655	183	838
	1%	8%	52%	36%	3%	100%	22%	
Moroccan respondents	1	2	12	23	8	46	0	46
	2%	4%	26%	50%	17%	100%	0%	
Tunisia	30	131	246	239	43	689	149	838
	5%	20%	37%	36%	6%	104%	18%	
Tunisian respondents	1	10	15	6	3	35	0	35
	3%	29%	43%	17%	9%	100%	0%	
Libya	194	234	182	53	0	663	175	838
	29%	35%	27%	8%	0%	100%	21%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: STATUS OF WOMEN**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

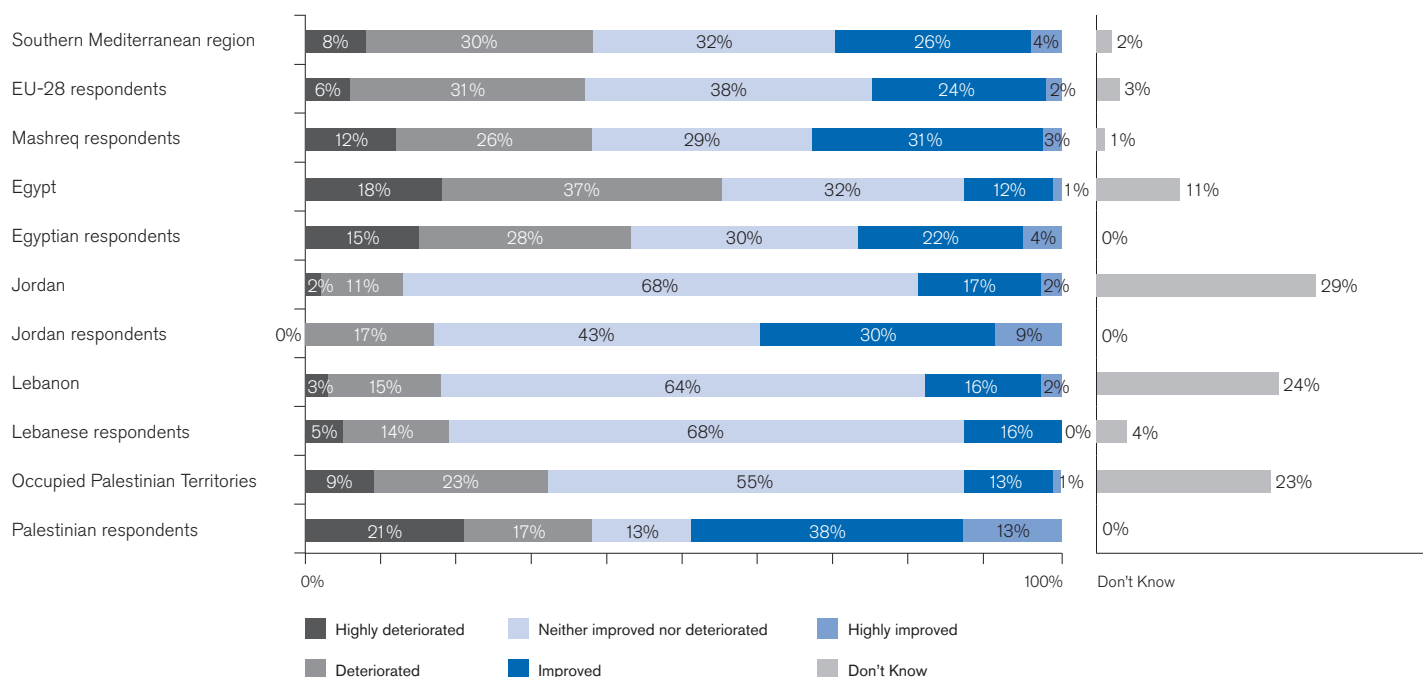
**Status of women**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	62	247	265	213	32	819	19	838
	8%	30%	32%	26%	4%	100%	2%	
EU-28 respondents	23	128	157	99	7	414	13	427
	6%	31%	38%	24%	2%	100%	3%	
Mashreq respondents	17	38	42	46	4	147	2	149
	12%	26%	29%	31%	3%	100%	1%	
Egypt	136	276	236	93	7	748	90	838
	18%	37%	32%	12%	1%	100%	11%	
Egyptian respondents	7	13	14	10	2	46	0	46
	15%	28%	30%	22%	4%	100%	0%	
Jordan	14	64	404	104	9	595	243	838
	2%	11%	68%	17%	2%	100%	29%	
Jordan respondents	0	4	10	7	2	23	0	23
	0%	17%	43%	30%	9%	100%	0%	
Lebanon	17	95	408	103	15	638	200	838
	3%	15%	64%	16%	2%	100%	24%	
Lebanese respondents	1	3	15	3	0	22	1	23
	5%	14%	68%	14%	0%	100%	4%	
Occupied Palestinian Territories	56	148	354	83	7	648	190	838
	9%	23%	55%	13%	1%	100%	23%	
Palestinian respondents	5	4	3	9	3	24	0	24
	21%	17%	13%	38%	13%	100%	0%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: STATUS OF WOMEN**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

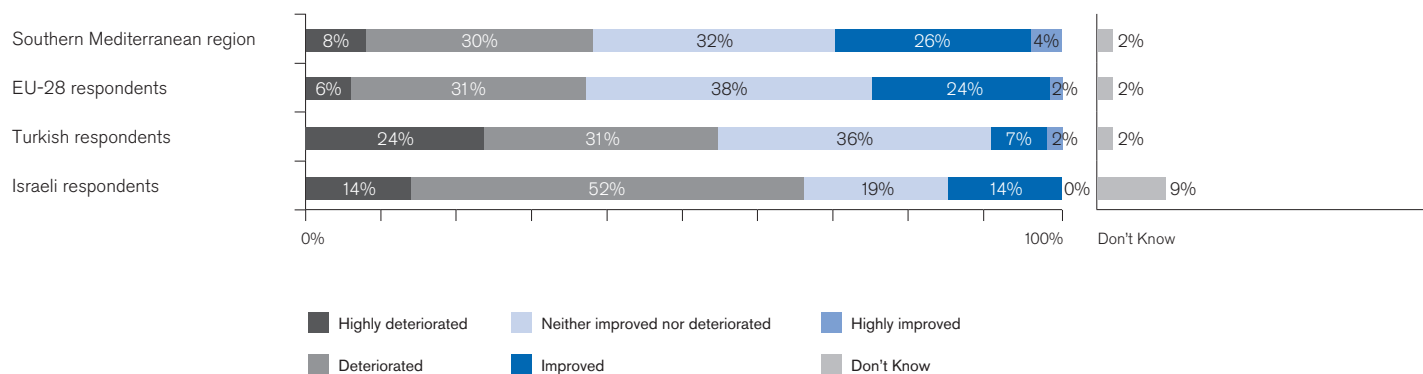
**Status of women**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	62	247	265	213	32	819	19	838
	8%	30%	32%	26%	4%	100%	2%	
EU-28 respondents	23	128	157	99	7	414	13	838
	6%	31%	38%	24%	2%	100%	2%	
Turkish respondents	11	14	16	3	1	45	1	46
	24%	31%	36%	7%	2%	100%	2%	
Israeli respondents	3	11	4	3	0	21	2	23
	14%	52%	19%	14%	0%	100%	9%	

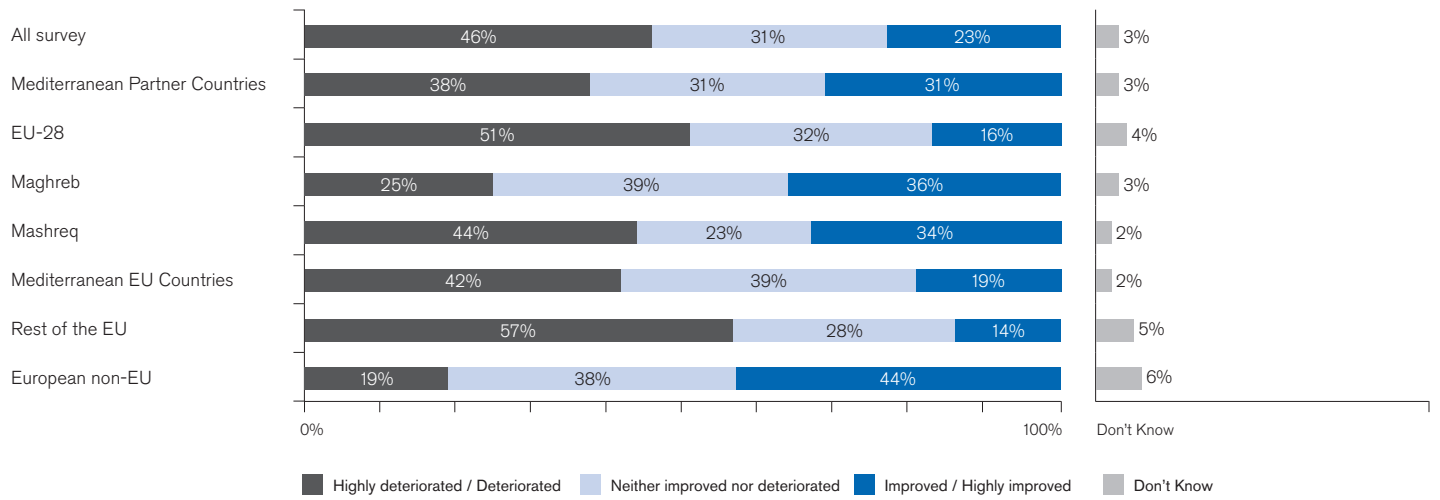
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: STATUS WOMEN**



**Assessing the improvement or deterioration in the last three years of the RECOGNITION OF MINORITIES; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Recognition of minorities**

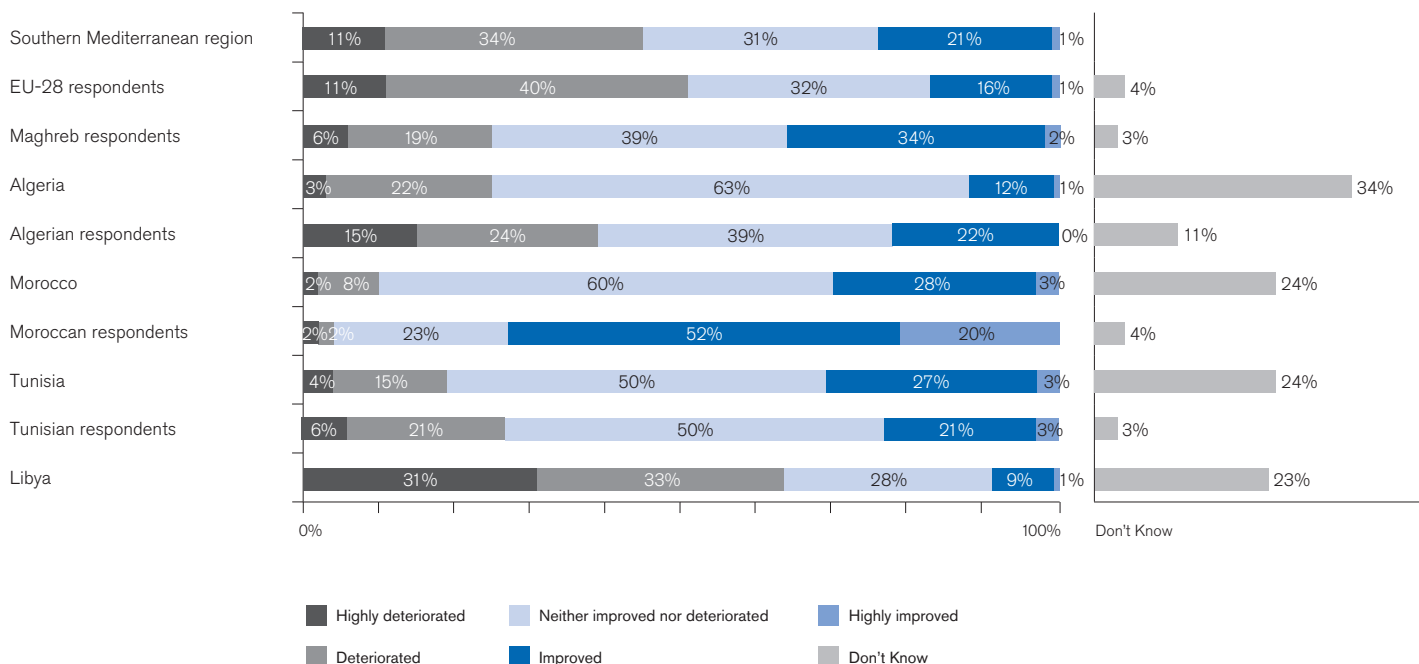
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	93	278	254	172	12	809	29	838
	11%	34%	31%	21%	1%	100%	3%	
EU-28 respondents	45	165	133	64	3	410	17	427
	11%	40%	32%	16%	1%	100%	4%	
Maghreb respondents	9	26	54	47	3	139	5	144
	6%	19%	39%	34%	2%	100%	3%	
Algeria	17	122	345	65	3	552	286	838
	3%	22%	63%	12%	1%	100%	34%	
Algerian respondents	6	10	16	9	0	41	5	46
	15%	24%	39%	22%	0%	100%	11%	
Morocco	11	50	383	176	20	640	198	838
	2%	8%	60%	28%	3%	100%	24%	
Moroccan respondents	1	1	10	23	9	44	2	46
	2%	2%	23%	52%	20%	100%	4%	
Tunisia	24	98	322	175	21	640	198	838
	4%	15%	50%	27%	3%	99%	24%	
Tunisian respondents	2	7	17	7	1	34	1	35
	6%	21%	50%	21%	3%	100%	3%	
Libya	198	210	178	55	4	645	193	838
	31%	33%	28%	9%	1%	100%	23%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: RECOGNITION OF MINORITIES**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

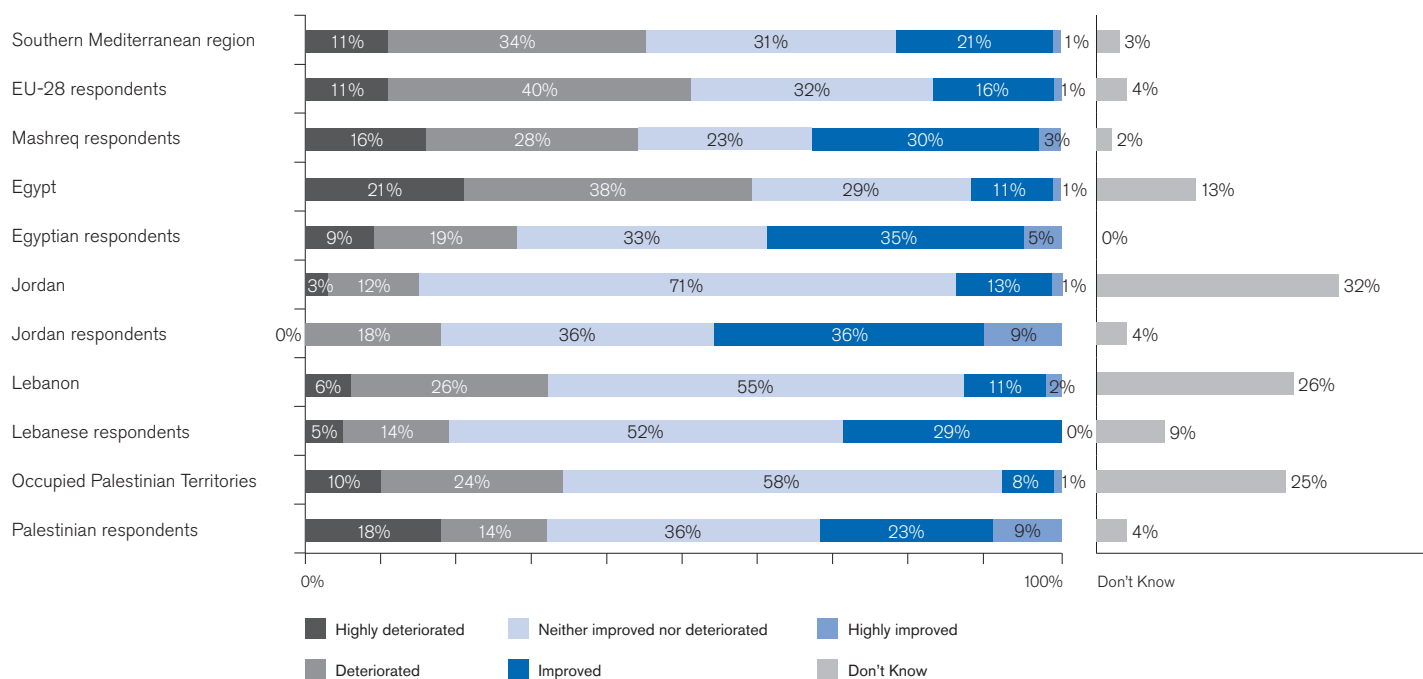
**Recognition of minorities**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	93	278	254	172	12	809	29	838
	11%	34%	31%	21%	1%	100%	3%	
EU-28 respondents	45	165	133	64	3	410	17	427
	11%	40%	32%	16%	1%	100%	4%	
Mashreq respondents	23	41	33	44	5	146	3	149
	16%	28%	23%	30%	3%	100%	2%	
Egypt	152	280	209	81	8	730	108	838
	21%	38%	29%	11%	1%	100%	13%	
Egyptian respondents	4	8	14	15	2	43	0	43
	9%	19%	33%	35%	5%	100%	0%	
Jordan	17	68	406	77	6	574	264	838
	3%	12%	71%	13%	1%	100%	32%	
Jordan respondents	0	4	8	8	2	22	1	23
	0%	18%	36%	36%	9%	100%	4%	
Lebanon	35	159	341	71	14	620	218	838
	6%	26%	55%	11%	2%	100%	26%	
Lebanese respondents	1	3	11	6	0	21	2	23
	5%	14%	52%	29%	0%	100%	26%	
Occupied Palestinian Territories	60	148	360	51	6	625	213	838
	10%	24%	58%	8%	1%	100%	25%	
Palestinian respondents	4	3	8	5	2	22	1	23
	18%	14%	36%	23%	9%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: RECOGNITION OF MINORITIES**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

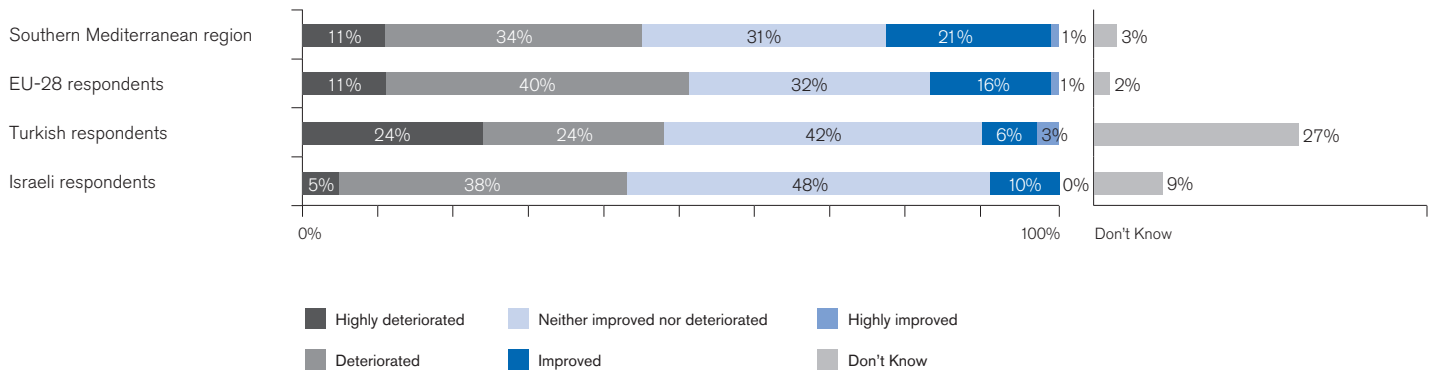
**Recognition of minorities**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	93	278	254	172	12	809	29	838
	11%	34%	31%	21%	1%	100%	3%	
EU-28 respondents	45	165	133	64	3	410	17	838
	11%	40%	32%	16%	1%	100%	2%	
Turkish respondents	8	8	14	2	1	33	12	45
	24%	24%	42%	6%	3%	100%	27%	
Israeli respondents	1	8	10	2	0	21	2	23
	5%	38%	48%	10%	0%	100%	9%	

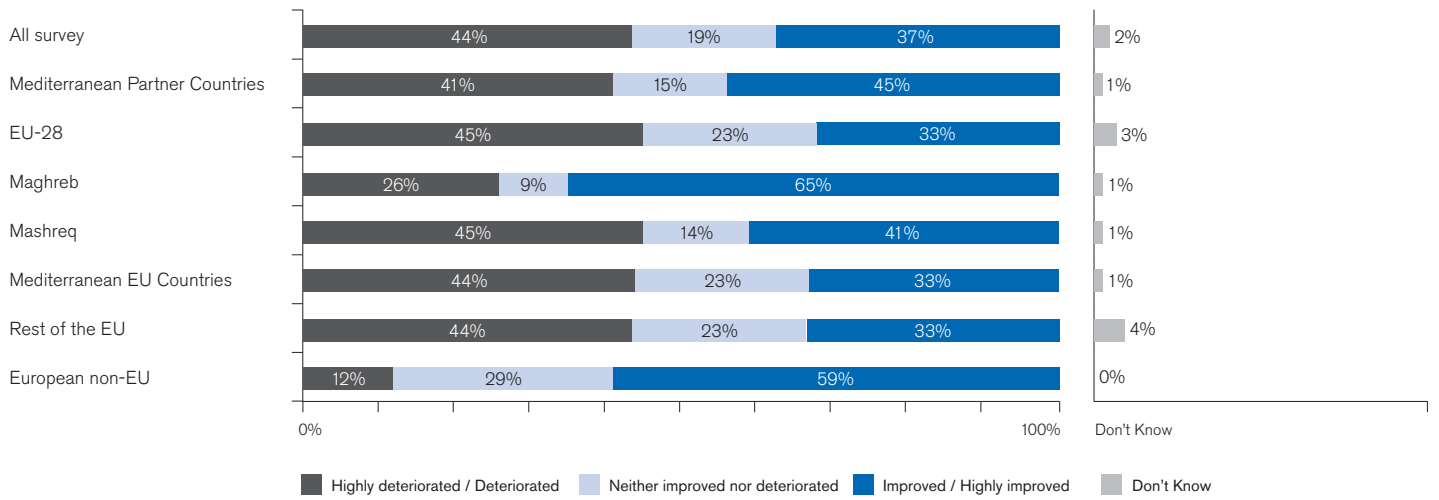
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: RECOGNITION OF MINORITIES**



**Assessing the improvement or deterioration in the last three years of FREEDOM OF EXPRESSION AND PRESS; respondents from:**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

**Freedom of expression and press**

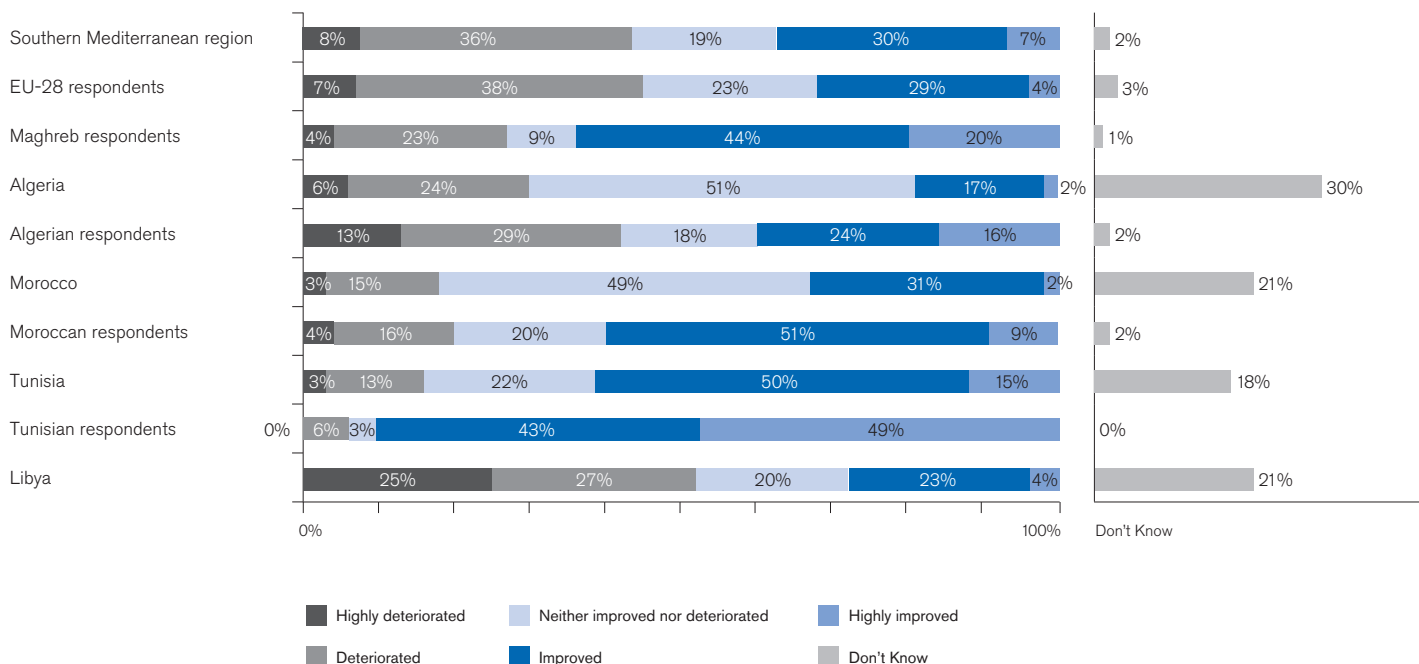
Maghreb	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	66	234	156	247	58	821	17	838
	8%	36%	19%	30%	7%	100%	2%	
EU-28 respondents	28	156	94	120	15	413	14	427
	7%	38%	23%	29%	4%	100%	3%	
Maghreb respondents	5	32	13	63	29	142	1	143
	4%	23%	9%	44%	20%	100%	1%	
Algeria	33	139	297	102	14	585	253	838
	6%	24%	51%	17%	2%	100%	30%	
Algerian respondents	6	13	8	11	7	45	1	46
	13%	29%	18%	24%	16%	100%	2%	
Morocco	20	97	327	207	13	684	174	838
	3%	15%	49%	31%	2%	100%	21%	
Moroccan respondents	2	7	9	23	4	45	1	46
	4%	16%	20%	51%	9%	100%	21%	
Tunisia	20	86	149	334	101	690	148	838
	3%	13%	22%	50%	15%	104%	18%	
Tunisian respondents	0	2	1	15	17	35	0	35
	0%	6%	3%	43%	49%	100%	0%	
Libya	169	182	135	152	25	663	175	838
	25%	27%	20%	23%	4%	100%	21%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: FREEDOM OF EXPRESSION AND PRESS**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

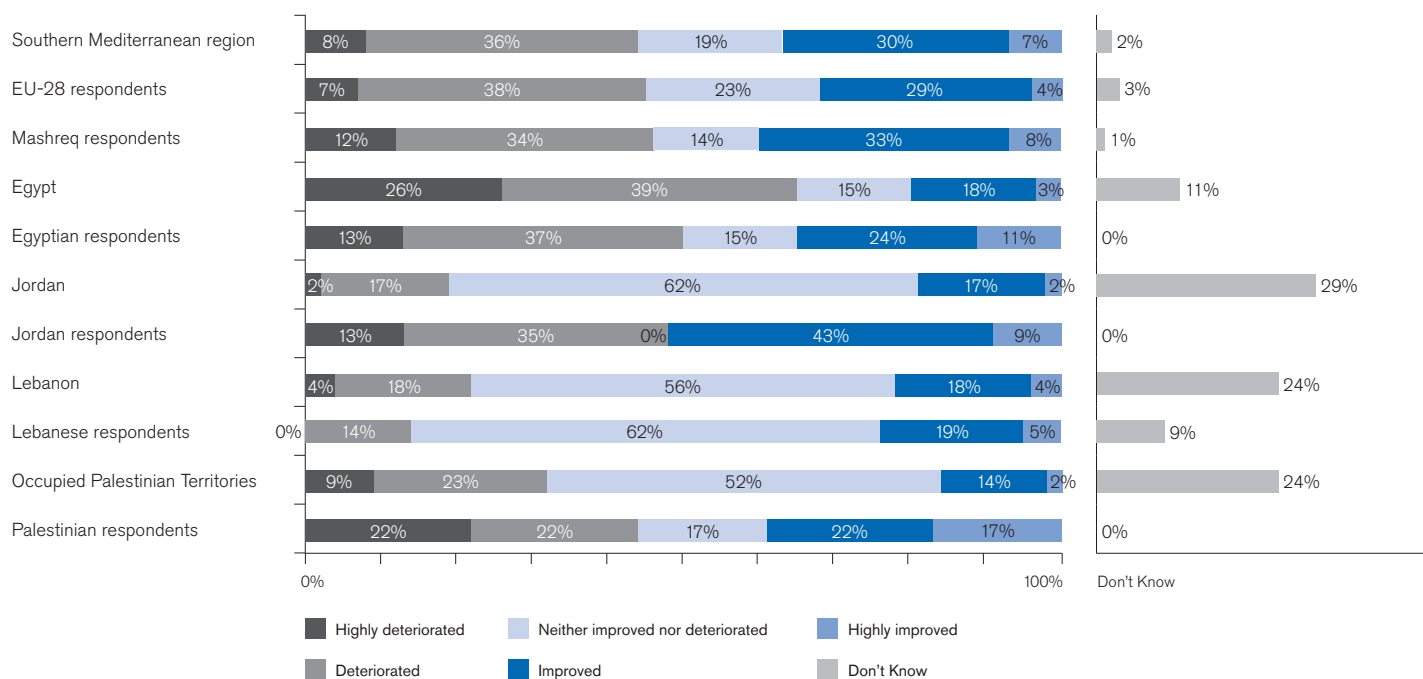
**Freedom of expression and press**

Mashreq	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	68	294	156	247	58	821	17	838
	8%	36%	19%	30%	7%	100%	2%	
EU-28 respondents	28	156	94	120	15	413	14	427
	7%	38%	23%	29%	4%	100%	3%	
Mashreq respondents	17	49	20	48	12	146	2	148
	12%	34%	14%	33%	8%	100%	1%	
Egypt	181	288	113	134	22	748	91	839
	26%	39%	15%	18%	3%	100%	11%	
Egyptian respondents	6	17	7	11	5	46	0	46
	13%	37%	15%	18%	3%	100%	0%	
Jordan	13	102	364	102	10	591	242	833
	2%	17%	62%	17%	2%	100%	29%	
Jordan respondents	3	8	0	10	2	23	0	23
	13%	35%	0%	43%	9%	100%	0%	
Lebanon	24	116	360	114	25	639	199	838
	4%	18%	56%	18%	4%	100%	24%	
Lebanese respondents	0	3	13	4	1	21	2	23
	0%	14%	62%	19%	5%	100%	9%	
Occupied Palestinian Territories	57	148	332	91	10	638	200	838
	9%	23%	52%	14%	2%	100%	24%	
Palestinian respondents	5	5	4	5	4	23	0	23
	22%	22%	17%	22%	17%	100%	0%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: FREEDOM OF EXPRESSION AND PRESS**



**B1. In your opinion, how much have the following elements improved or deteriorated in the last three years?**

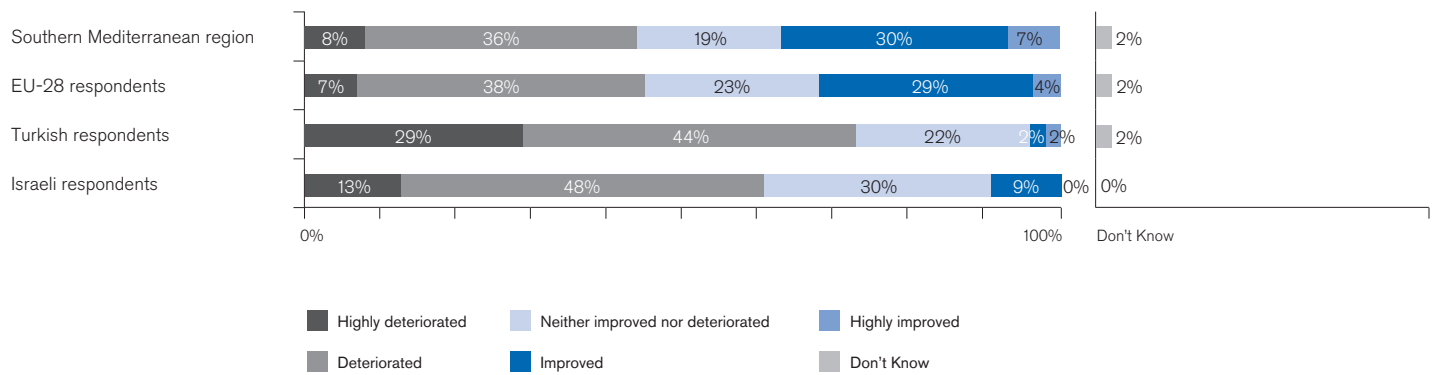
**Freedom of expression and press**

Turkey and Israel	Highly deteriorated	Deteriorated	Neither improved nor deteriorated	Improved	Highly improved	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	66	294	156	247	58	821	17	838
	8%	36%	19%	30%	7%	100%	2%	
EU-28 respondents	28	156	94	120	15	413	14	838
	7%	38%	23%	29%	4%	100%	2%	
Turkish respondents	13	20	10	1	1	45	1	46
	29%	44%	22%	2%	2%	100%	2%	
Israeli respondents	3	11	7	2	0	23	0	23
	13%	48%	30%	9%	0%	100%	0%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the last three years in the: FREEDOM OF EXPRESSION AND PRESS**



## Domestic and Geopolitical Changes in the Euro-Mediterranean Region

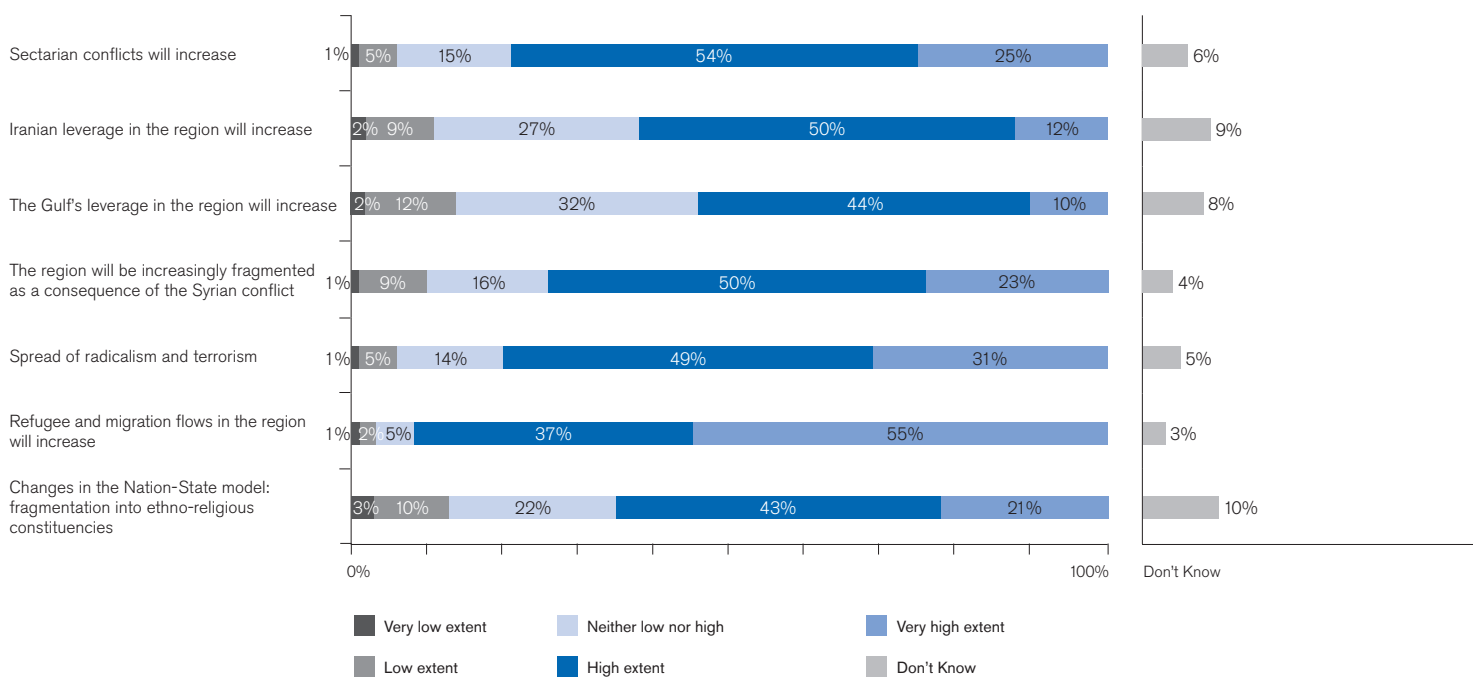
### B2. To what extent will the following scenarios be affected by the Syrian conflict?

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
Sectarian conflicts will increase	7	41	115	428	199	<b>790</b>	48	838
	1%	5%	15%	54%	25%	<b>100%</b>	6%	
Iranian leverage in the region will increase	15	67	203	381	93	<b>759</b>	79	838
	2%	9%	27%	50%	12%	<b>100%</b>	9%	
The Gulf's leverage in the region will increase	17	90	247	337	76	<b>767</b>	71	838
	2%	12%	32%	44%	10%	<b>100%</b>	8%	
The region will be increasingly fragmented as a consequence of the Syrian conflict	11	76	129	400	189	<b>805</b>	33	838
	1%	9%	16%	50%	23%	<b>100%</b>	4%	
Spread of radicalism and terrorism	8	39	114	389	248	<b>798</b>	40	838
	1%	5%	14%	49%	31%	<b>100%</b>	5%	
Refugee and migration flows in the region will increase	8	14	41	301	448	<b>812</b>	26	838
	1%	2%	5%	37%	55%	<b>100%</b>	3%	
Changes in the Nation-State model: fragmentation into ethno-religious constituencies	19	79	163	329	168	<b>758</b>	80	838
	3%	10%	22%	43%	22%	<b>100%</b>	10%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

### Assessing the following scenarios affected by the Syrian conflict



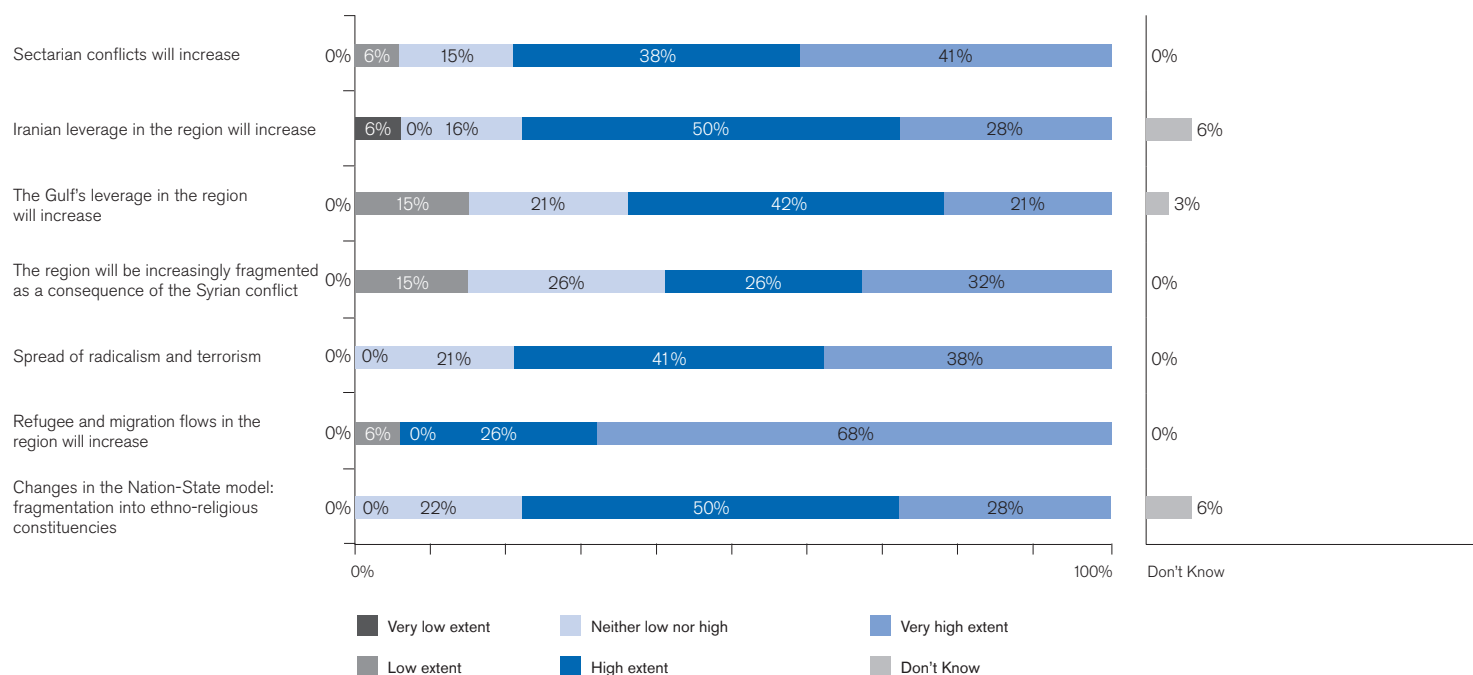
**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

Syrian respondents	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
Sectarian conflicts will increase	0	2	5	13	14	34	0	34
	0%	6%	15%	38%	41%	100%	0%	
Iranian leverage in the region will increase	2	0	5	16	9	32	2	34
	6%	0%	16%	50%	28%	100%	6%	
The Gulf's leverage in the region will increase	0	5	7	14	7	33	1	34
	0%	15%	21%	42%	21%	100%	3%	
The region will be increasingly fragmented as a consequence of the Syrian conflict	0	5	9	9	11	34	0	34
	0%	15%	26%	26%	32%	100%	0%	
Spread of radicalism and terrorism	0	0	7	14	13	34	0	34
	0%	0%	21%	41%	38%	100%	0%	
Refugee and migration flows in the region will increase	0	2	0	9	23	34	0	34
	0%	6%	0%	26%	68%	100%	0%	
Changes in the Nation-State model: fragmentation into ethno-religious constituencies	0	0	7	16	9	32	2	34
	0%	0%	22%	50%	28%	100%	6%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the following scenarios affected by the Syrian conflict (Syrian respondents)**



**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

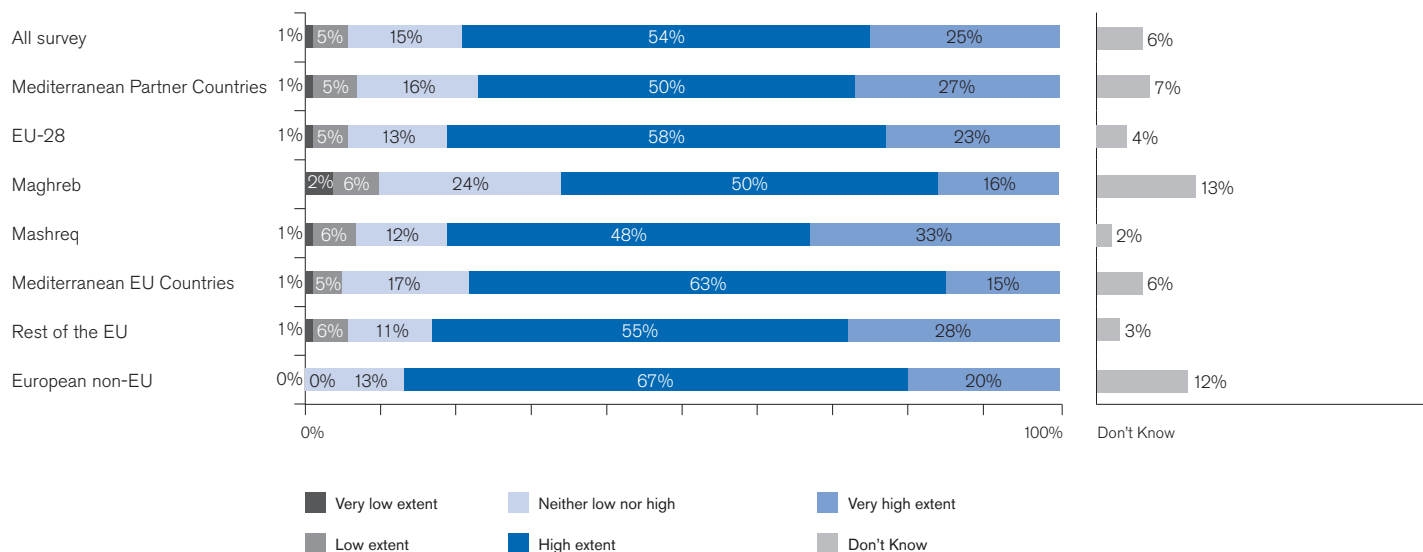
**Sectarian conflicts will increase**

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
All survey	7	41	115	428	199	790	48	838
	1%	5%	15%	54%	25%	100%	6%	
Mediterranean Partner Countries	5	19	57	174	95	350	26	376
	1%	5%	16%	50%	27%	100%	7%	
EU-28	3	22	54	237	93	409	18	427
	1%	5%	13%	58%	23%	100%	4%	
Maghreb	2	8	30	62	22	124	19	143
	2%	6%	24%	50%	18%	100%	13%	
Mashreq	2	8	18	69	48	145	3	148
	1%	6%	12%	48%	33%	100%	2%	
Mediterranean EU Countries	1	8	27	101	24	161	10	171
	1%	5%	17%	63%	15%	100%	6%	
Rest of EU	1	15	28	137	69	250	7	257
	0%	6%	11%	55%	28%	100%	3%	
European non-EU	0	0	2	10	3	15	2	17
	0%	0%	13%	67%	20%	100%	12%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the following scenarios affected by the Syrian conflict: SECTARIAN CONFLICTS WILL INCREASE**



**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

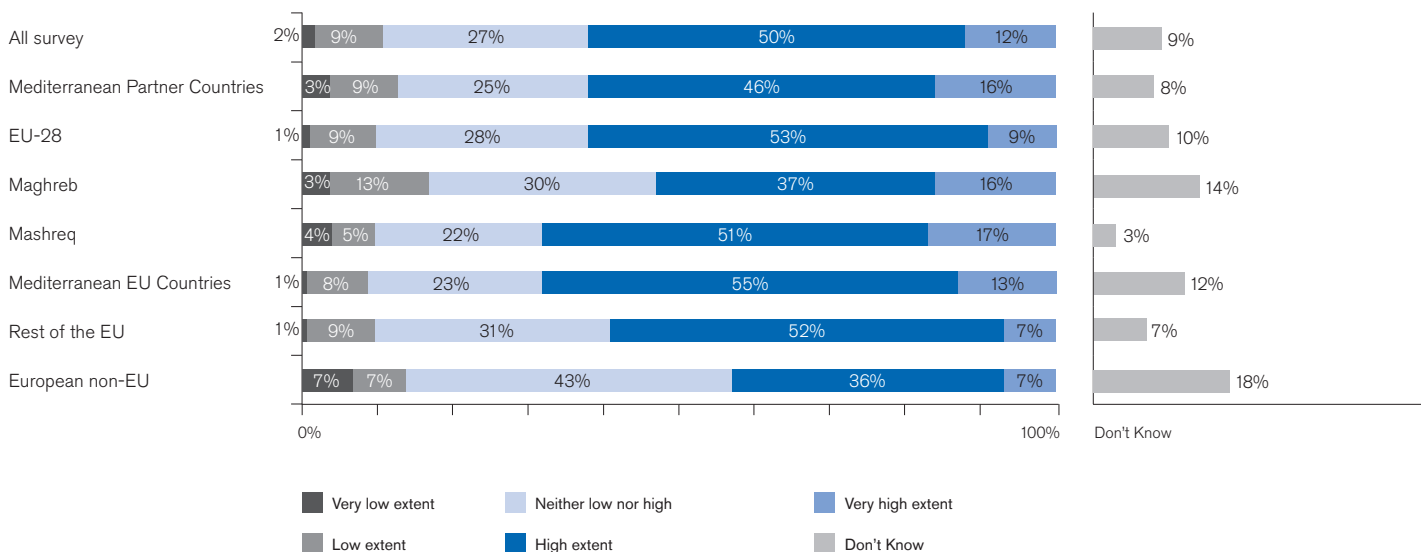
**Iranian leverage in the region will increase**

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
All survey	15	67	203	381	93	759	79	838
	2%	9%	27%	50%	12%	100%	9%	
Mediterranean Partner Countries	12	32	87	160	55	346	30	376
	3%	9%	25%	46%	16%	100%	8%	
EU-28	3	35	108	206	34	386	42	428
	1%	9%	28%	53%	9%	100%	10%	
Maghreb	4	16	37	46	20	123	20	143
	3%	13%	30%	37%	16%	100%	14%	
Mashreq	6	7	32	74	25	144	4	148
	4%	5%	22%	51%	17%	100%	3%	
Mediterranean EU Countries	2	12	35	82	19	150	21	171
	1%	8%	23%	55%	13%	100%	12%	
Rest of EU	2	22	74	124	16	238	19	257
	1%	9%	31%	52%	7%	100%	7%	
European non-EU	1	1	6	5	1	14	3	17
	7%	7%	43%	36%	7%	100%	18%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the following scenarios affected by the Syrian conflict: IRANIAN LEVERAGE IN THE REGION WILL INCREASE**



**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

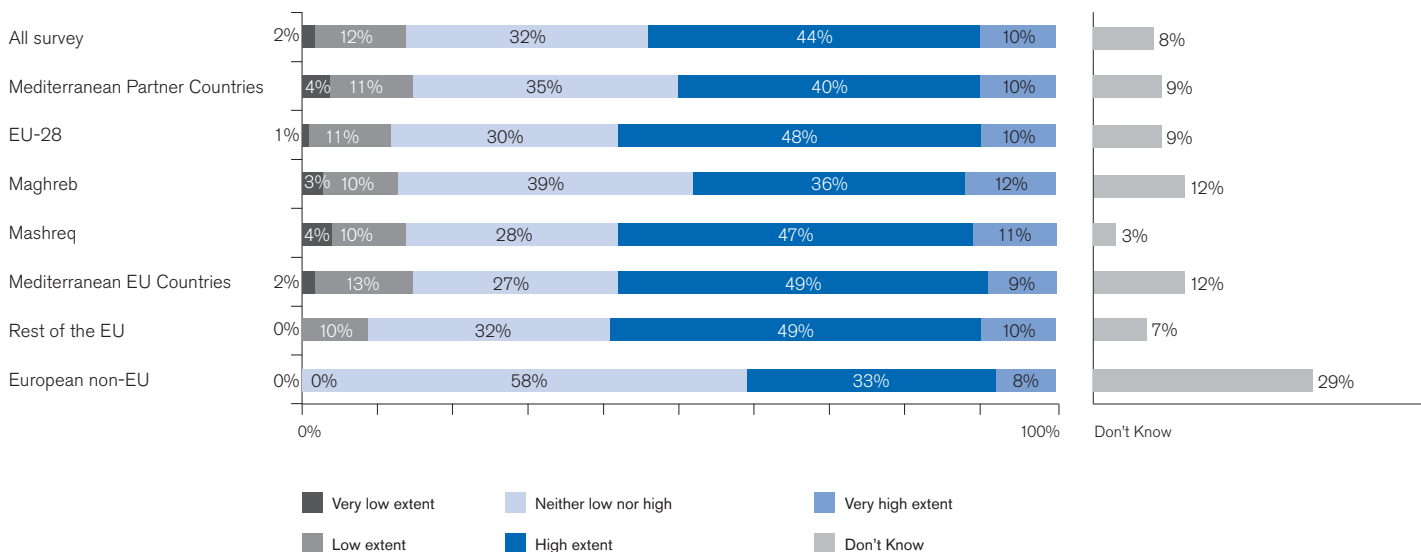
**The Gulf's leverage in the region will increase**

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
All survey	17	90	247	337	76	<b>767</b>	71	838
	2%	12%	32%	44%	10%	<b>100%</b>	8%	
Mediterranean Partner Countries	14	38	120	137	35	<b>344</b>	32	376
	4%	11%	35%	40%	10%	<b>100%</b>	9%	
EU-28	3	44	116	189	38	<b>390</b>	38	428
	1%	11%	30%	48%	10%	<b>100%</b>	9%	
Maghreb	4	13	49	45	15	<b>126</b>	17	143
	3%	10%	39%	36%	12%	<b>100%</b>	12%	
Mashreq	6	14	40	67	16	<b>143</b>	5	148
	4%	10%	28%	47%	11%	<b>100%</b>	3%	
Mediterranean EU Countries	3	20	40	73	14	<b>150</b>	21	171
	2%	13%	27%	49%	9%	<b>100%</b>	12%	
Rest of EU	0	24	76	116	23	<b>239</b>	18	257
	0%	10%	32%	49%	10%	<b>100%</b>	7%	
European non-EU	0	0	7	4	1	<b>12</b>	5	17
	0%	0%	58%	33%	8%	<b>100%</b>	29%	

(\* ) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the following scenarios affected by the Syrian conflict: THE GULF'S LEVERAGE IN THE REGION WILL INCREASE**



**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

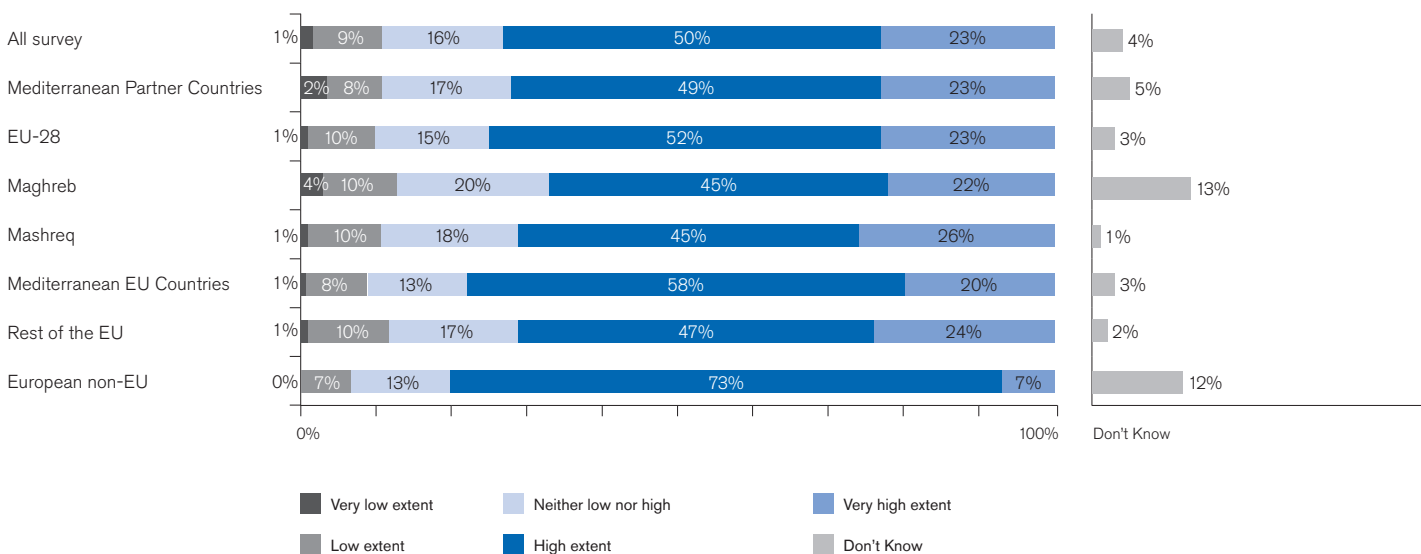
**The region will be increasingly fragmented as a consequence of the Syrian conflict**

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
All survey	1	76	129	400	189	805	33	838
	1%	9%	16%	50%	23%	100%	4%	
Mediterranean Partner Countries	8	32	61	174	81	356	20	376
	2%	9%	17%	49%	23%	100%	5%	
EU-28	2	40	64	216	94	416	12	428
	0%	10%	15%	52%	23%	100%	3%	
Maghreb	5	12	25	56	27	125	18	143
	4%	10%	20%	45%	22%	100%	13%	
Mashreq	1	15	27	65	38	146	2	148
	1%	10%	18%	45%	26%	100%	1%	
Mediterranean EU Countries	1	14	22	96	33	166	5	171
	1%	8%	13%	58%	20%	100%	3%	
Rest of EU	2	26	43	119	61	251	6	257
	1%	10%	17%	47%	24%	100%	2%	
European non-EU	0	1	2	11	1	15	2	17
	0%	7%	13%	73%	7%	100%	12%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the following scenarios affected by the Syrian conflict: THE REGION WILL BE INCREASINGLY FRAGMENTED AS A CONSEQUENCE OF THE SYRIAN CONFLICT**



**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

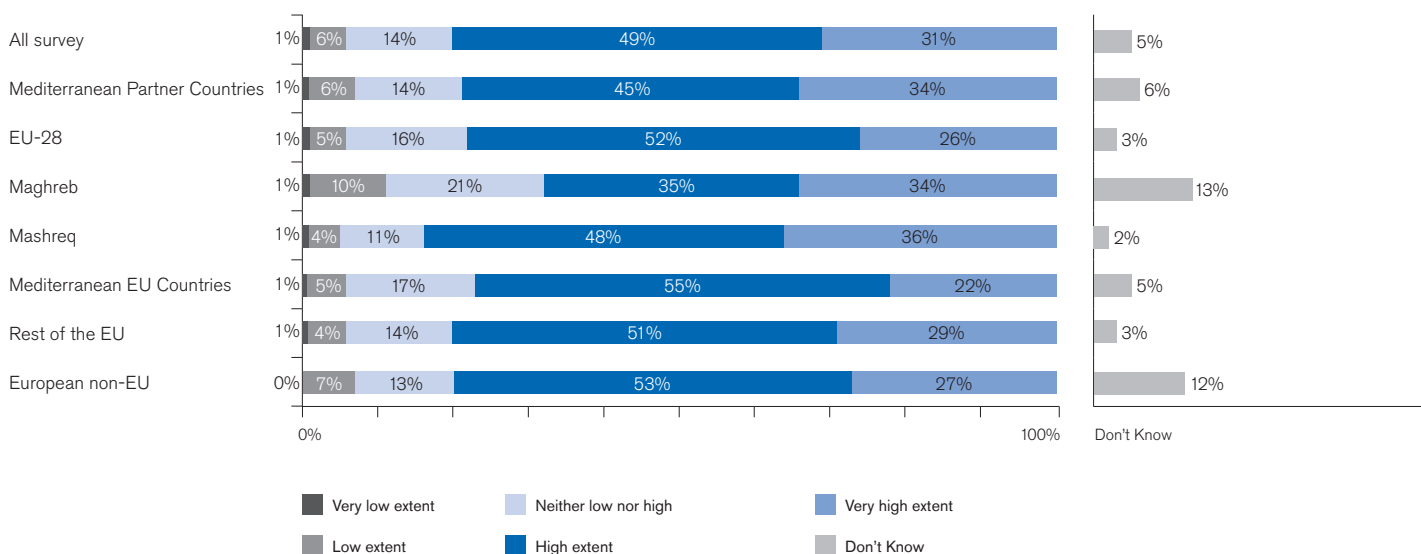
**Spread of radicalism and terrorism**

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
All survey	8	39	114	389	248	798	40	838
	1%	5%	14%	49%	31%	100%	5%	
Mediterranean Partner Countries	4	20	50	158	122	354	22	376
	1%	6%	14%	45%	34%	100%	6%	
EU-28	4	20	65	218	109	416	12	428
	1%	5%	16%	52%	26%	100%	3%	
Maghreb	1	12	26	44	42	125	18	143
	1%	10%	21%	35%	34%	100%	13%	
Mashreq	1	6	16	70	53	146	3	148
	1%	4%	11%	48%	36%	100%	2%	
Mediterranean EU Countries	1	8	28	90	36	163	8	171
	1%	5%	17%	55%	22%	100%	5%	
Rest of EU	3	11	36	127	72	249	8	257
	1%	4%	14%	51%	29%	100%	3%	
European non-EU	0	1	2	8	4	15	2	17
	0%	7%	13%	53%	27%	100%	12%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the following scenarios affected by the Syrian conflict: SPREAD OF RADICALISM AND TERRORISM**



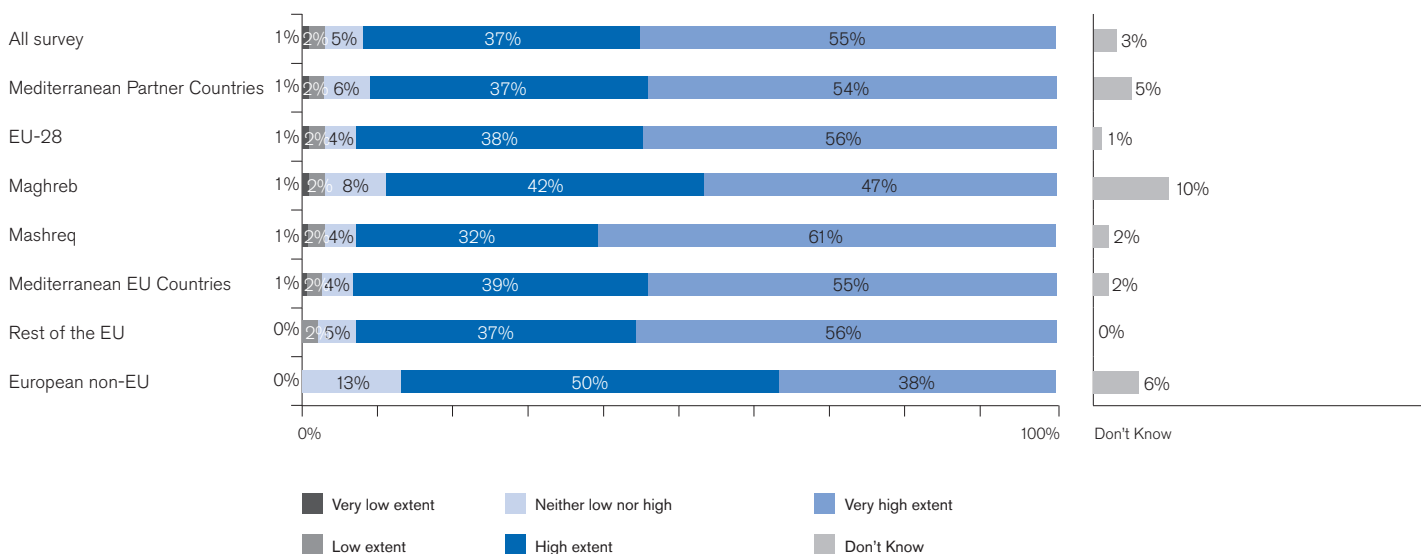
**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

Refugee and migration flows in the region will increase	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
All survey	8	14	41	301	448	812	26	838
	1%	2%	5%	37%	55%	100%	3%	
Mediterranean Partner Countries	5	8	22	131	191	357	19	376
	1%	2%	6%	37%	54%	100%	5%	
EU-28	3	6	19	159	236	423	5	428
	1%	1%	4%	38%	56%	100%	1%	
Maghreb	1	3	10	54	60	128	15	143
	1%	2%	8%	42%	47%	100%	10%	
Mashreq	2	3	6	46	88	145	3	148
	1%	2%	4%	32%	61%	100%	2%	
Mediterranean EU Countries	2	2	6	65	92	167	4	171
	1%	1%	4%	39%	55%	100%	2%	
Rest of EU	1	4	14	94	143	256	1	257
	0%	2%	5%	37%	56%	100%	0%	
European non-EU	0	0	2	8	6	16	1	17
	0%	0%	13%	50%	38%	100%	6%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\* Total number of respondents including "Don't know" answers)

**Assessing the following scenarios affected by the Syrian conflict: REFUGEE AND MIGRATION FLOWS IN THE REGION WILL INCREASE**



**B2. To what extent will the following scenarios be affected by the Syrian conflict?**

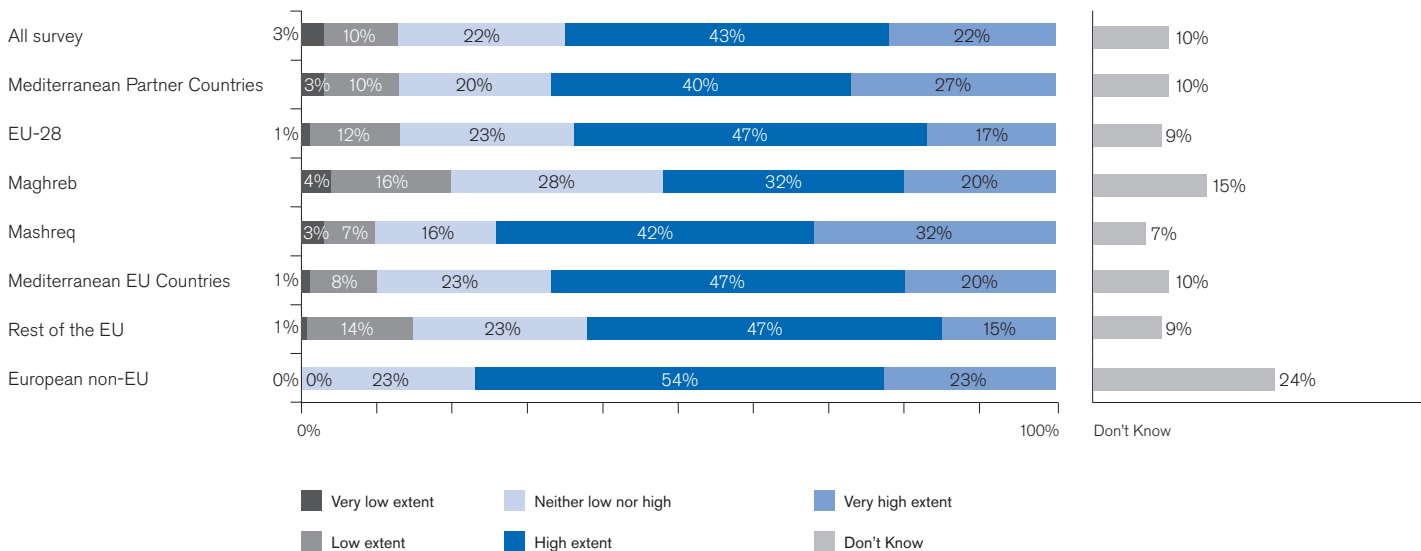
**Changes in the Nation-State model: fragmentation into ethno-religious constituencies**

	Very low extent	Low extent	Neither low nor high	High extent	Very high extent	Total*	Dkn	Total**
All survey	19	79	163	329	168	758	80	838
	3%	10%	22%	43%	22%	100%	10%	
Mediterranean Partner Countries	11	33	67	136	91	338	38	376
	3%	10%	20%	40%	27%	100%	10%	
EU-28	4	46	89	183	67	389	39	428
	1%	12%	23%	47%	17%	100%	9%	
Maghreb	5	19	34	39	25	122	21	143
	4%	16%	28%	32%	20%	100%	15%	
Mashreq	4	10	22	57	44	137	10	148
	3%	7%	16%	42%	32%	100%	7%	
Mediterranean EU Countries	2	12	36	73	31	154	17	171
	1%	8%	23%	47%	20%	100%	10%	
Rest of EU	3	34	53	110	35	235	22	257
	1%	14%	23%	47%	15%	100%	9%	
European non-EU	0	0	3	7	3	13	4	17
	0%	0%	23%	54%	23%	100%	24%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

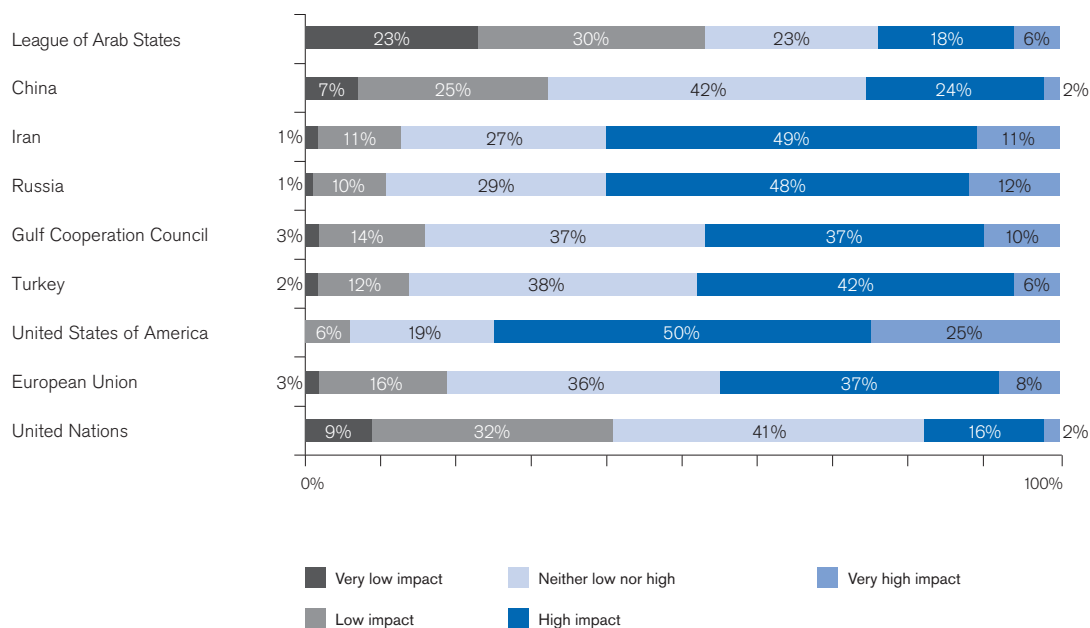
**Assessing the following scenarios affected by the Syrian conflict: CHANGES IN THE NATION-STATE MODEL: FRAGMENTATION INTO ETHNO-RELIGIOUS CONSTITUENCIES**



**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

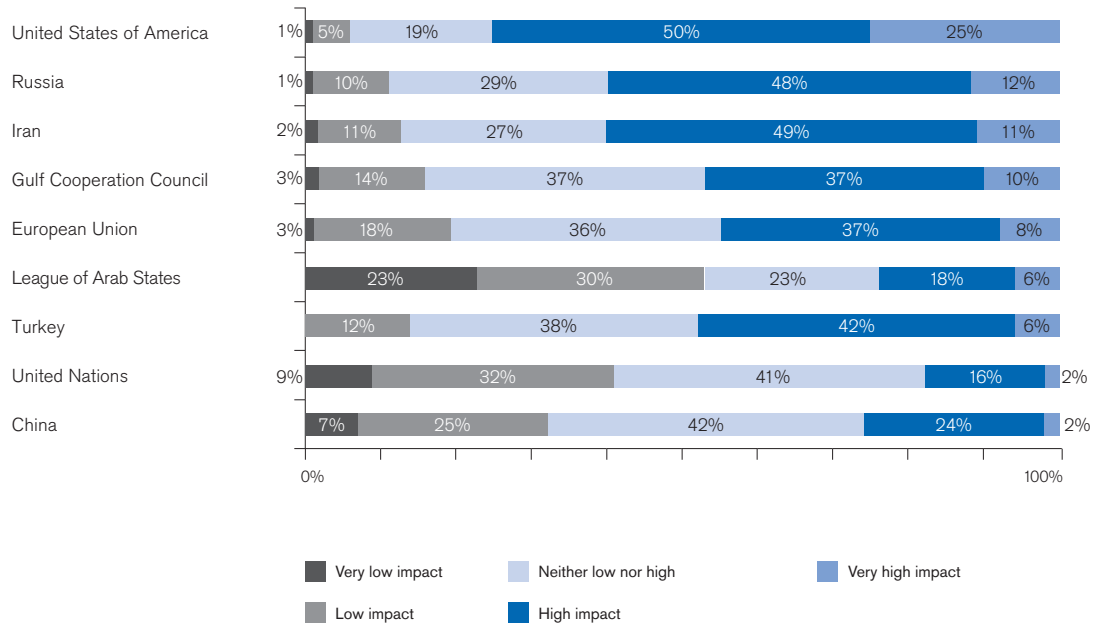
	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
League of Arab States	190 23%	255 30%	195 23%	147 18%	51 6%	838 100%
China	57 7%	212 25%	351 42%	200 24%	18 2%	838 100%
Iran	20 2%	94 11%	228 27%	407 49%	89 11%	838 100%
Russia	9 1%	86 10%	245 29%	401 48%	97 12%	838 100%
Gulf Cooperation Council	21 3%	117 14%	308 37%	307 37%	85 10%	838 100%
Turkey	17 2%	99 12%	318 38%	256 42%	48 6%	838 100%
United States of America	9 1%	46 5%	158 19%	416 50%	209 25%	838 100%
European Union	22 3%	137 16%	299 36%	312 37%	68 8%	838 100%
United Nations	73 9%	268 32%	346 41%	132 16%	19 2%	838 100%

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



**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

Assessing the impact of the following international players in the Southern Mediterranean countries (classified by % of "very high impact" answers)

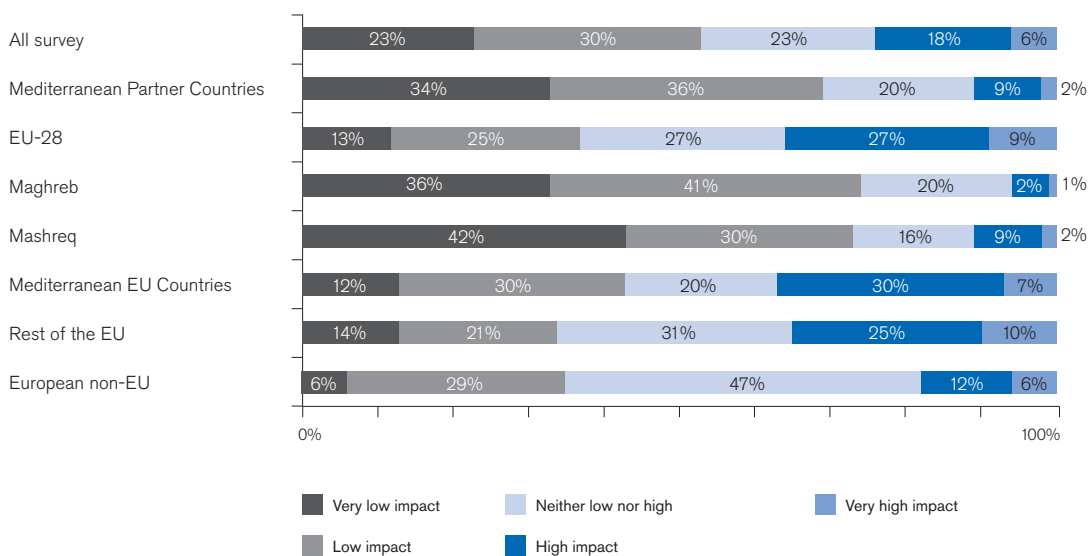


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**League of Arab States**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	190 23%	255 30%	195 23%	147 18%	51 6%	<b>838</b> <b>100%</b>
Mediterranean Partner Countries	127 34%	135 36%	76 20%	32 9%	6 2%	<b>376</b> <b>100%</b>
EU-28	56 13%	106 25%	114 27%	115 27%	37 9%	<b>428</b> <b>100%</b>
Maghreb	52 36%	58 41%	29 20%	3 2%	1 1%	<b>143</b> <b>100%</b>
Mashreq	62 42%	45 30%	24 16%	14 9%	3 2%	<b>148</b> <b>100%</b>
Mediterranean EU Countries	21 12%	52 30%	34 20%	52 30%	12 7%	<b>171</b> <b>100%</b>
Rest of EU	35 14%	55 21%	79 31%	63 25%	25 10%	<b>257</b> <b>100%</b>
European non-EU	1 6%	5 29%	8 47%	2 12%	1 6%	<b>17</b> <b>100%</b>

**Assessing the impact of the League of Arab States in the Southern Mediterranean countries**

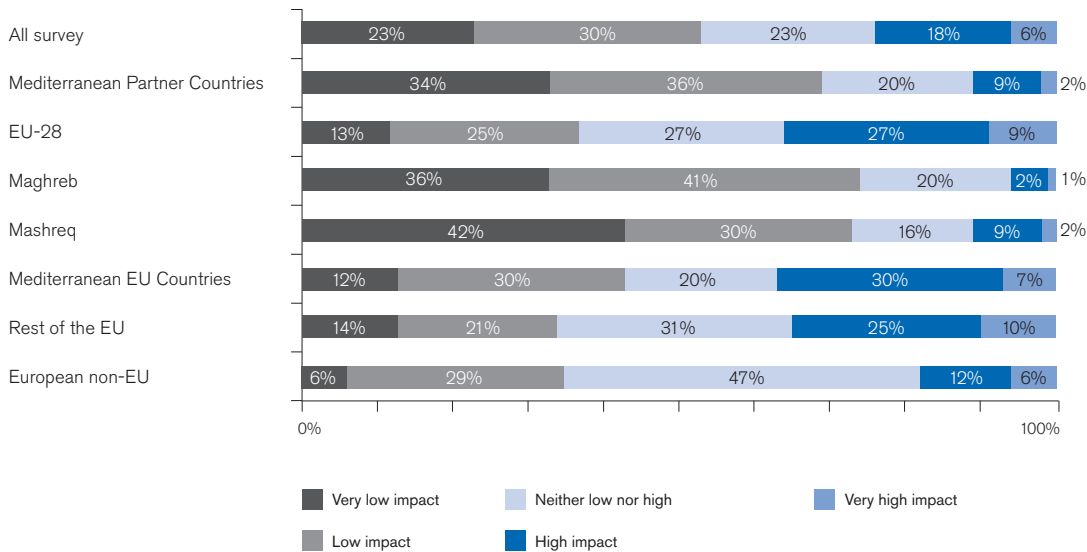


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**China**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	57 7%	212 25%	351 42%	200 24%	18 2%	838 100%
Mediterranean Partner Countries	22 6%	91 24%	171 45%	87 23%	5 1%	376 100%
EU-28	31 7%	110 26%	167 39%	110 26%	10 2%	428 100%
Maghreb	4 3%	20 14%	84 59%	33 23%	2 1%	143 100%
Mashreq	14 9%	46 31%	51 34%	35 24%	2 1%	148 100%
Mediterranean EU Countries	10 6%	44 26%	63 37%	48 28%	6 4%	171 100%
Rest of EU	21 8%	67 26%	104 40%	62 24%	3 1%	257 100%
European non-EU	0 0%	7 41%	7 41%	3 18%	0 0%	17 100%

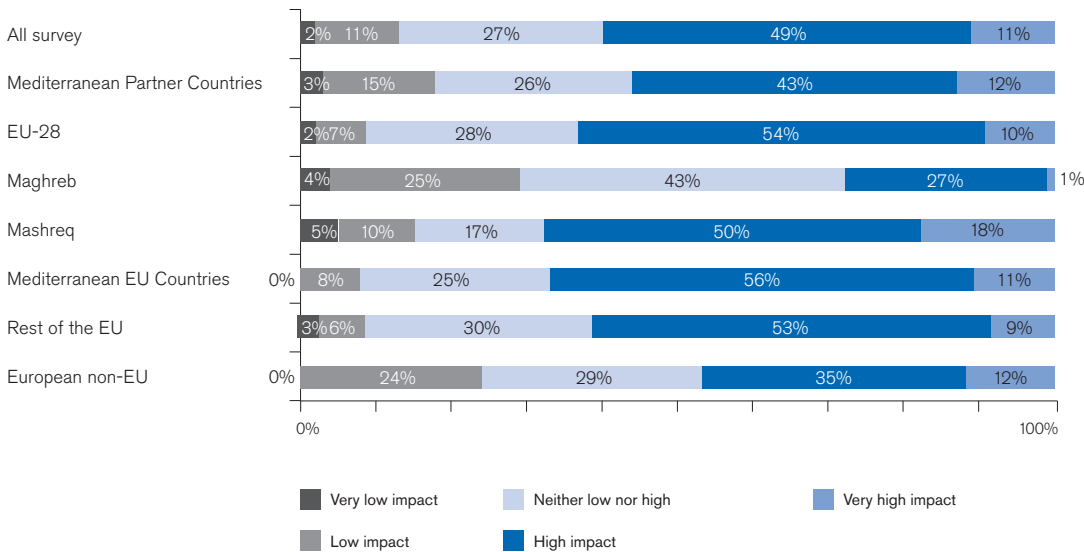
**Assessing the impact of China in the Southern Mediterranean countries**



**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

Iran	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	20 2%	94 11%	228 27%	407 49%	89 11%	838 100%
Mediterranean Partner Countries	13 3%	58 15%	99 26%	162 43%	44 12%	376 100%
EU-28	7 2%	29 7%	119 28%	232 54%	41 10%	428 100%
Maghreb	6 4%	36 25%	62 43%	38 27%	1 1%	143 100%
Mashreq	7 5%	15 10%	25 17%	74 50%	27 18%	148 100%
Mediterranean EU Countries	0 0%	14 8%	42 25%	96 56%	19 11%	171 100%
Rest of EU	7 3%	15 6%	77 30%	136 53%	22 9%	257 100%
European non-EU	0 0%	4 24%	5 29%	6 35%	2 12%	17 100%

**Assessing the impact of Iran in the Southern Mediterranean countries**

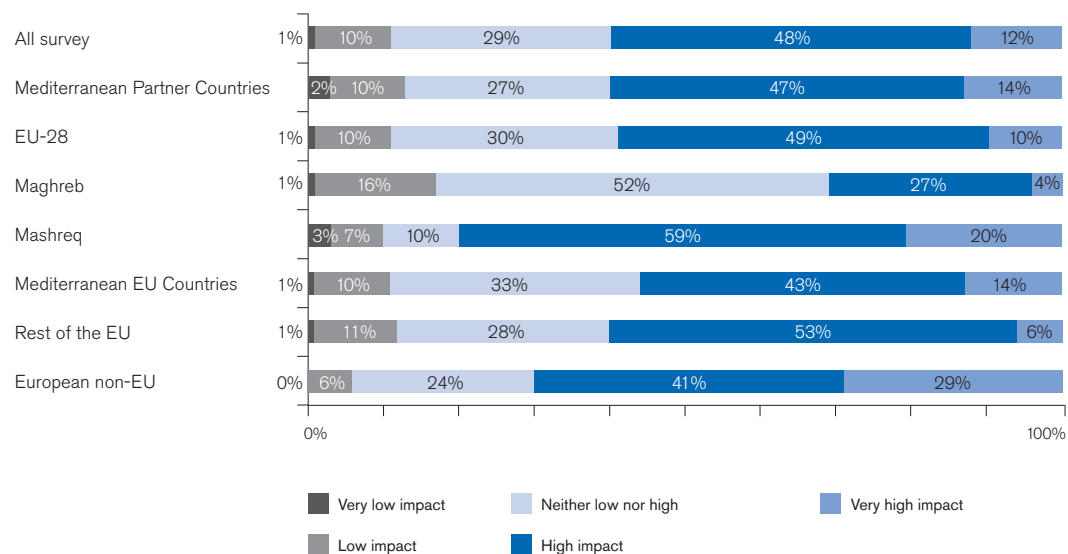


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**Russia**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	9 1%	86 10%	245 29%	401 48%	97 12%	<b>838</b> <b>100%</b>
Mediterranean Partner Countries	6 2%	39 10%	102 27%	177 47%	52 14%	<b>376</b> <b>100%</b>
EU-28	3 1%	44 10%	127 30%	210 49%	44 10%	<b>428</b> <b>100%</b>
Maghreb	1 1%	23 16%	74 52%	39 27%	6 4%	<b>143</b> <b>100%</b>
Mashreq	5 3%	11 7%	15 10%	88 59%	29 20%	<b>148</b> <b>100%</b>
Mediterranean EU Countries	0 0%	17 10%	56 33%	74 43%	24 14%	<b>171</b> <b>100%</b>
Rest of EU	3 1%	27 11%	71 28%	136 53%	20 8%	<b>257</b> <b>100%</b>
European non-EU	0 0%	1 6%	4 24%	7 41%	5 29%	<b>17</b> <b>100%</b>

**Assessing the impact of Russia in the Southern Mediterranean countries**

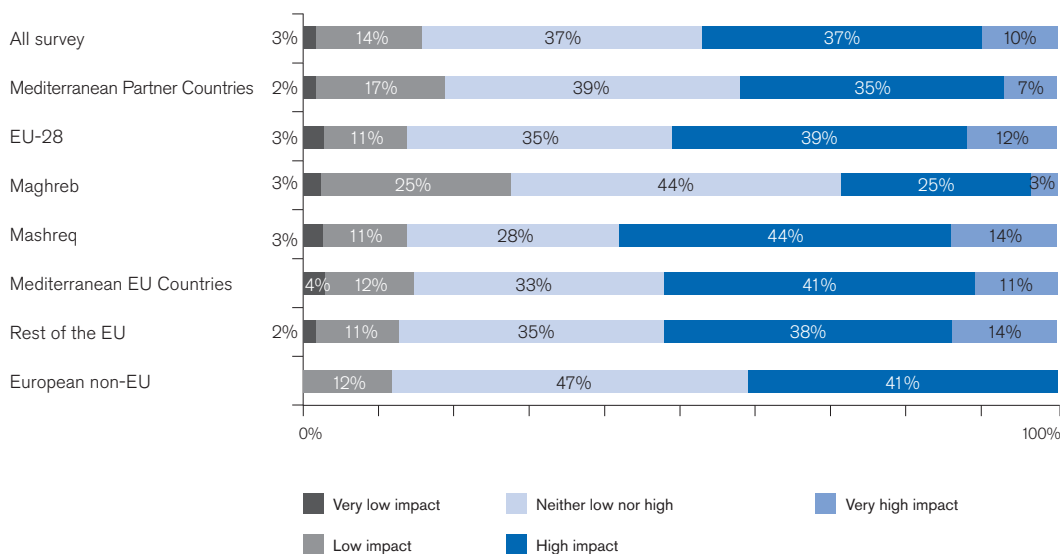


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**Gulf Cooperation Council**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	21 3%	117 14%	308 37%	307 37%	85 10%	<b>838</b> <b>100%</b>
Mediterranean Partner Countries	9 2%	65 17%	146 39%	130 35%	26 7%	<b>376</b> <b>100%</b>
EU-28	11 3%	49 11%	148 35%	168 39%	52 12%	<b>428</b> <b>100%</b>
Maghreb	4 3%	36 25%	63 44%	36 25%	4 3%	<b>143</b> <b>100%</b>
Mashreq	4 3%	16 11%	42 28%	65 44%	21 14%	<b>148</b> <b>100%</b>
Mediterranean EU Countries	6 4%	20 12%	57 33%	70 41%	18 11%	<b>171</b> <b>100%</b>
Rest of EU	6 2%	28 11%	90 35%	98 38%	35 14%	<b>257</b> <b>100%</b>
European non-EU	0 0%	2 12%	8 47%	7 41%	0 0%	<b>17</b> <b>100%</b>

**Assessing the impact of Gulf Cooperation Council in the Southern Mediterranean countries**

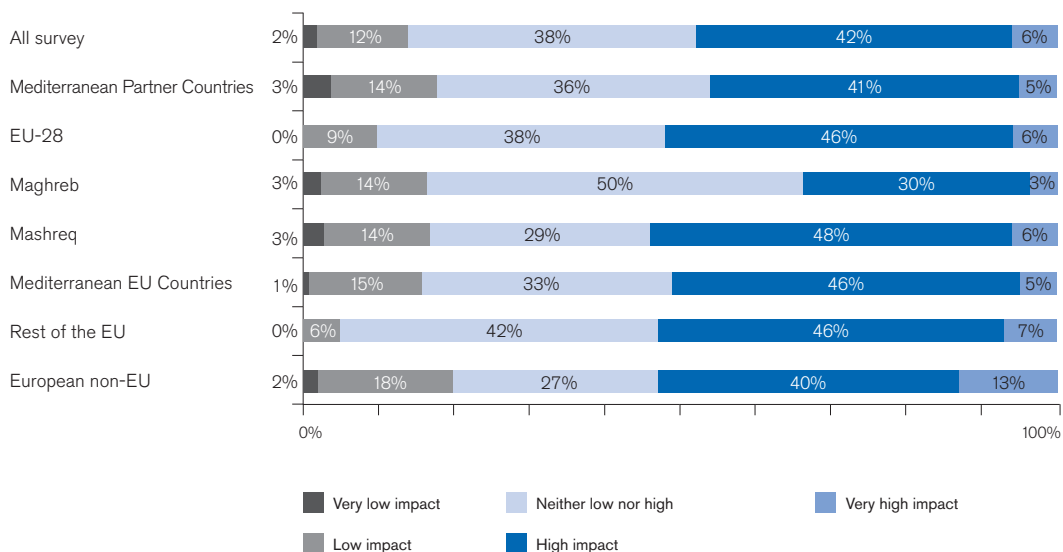


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**Turkey**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	17 2%	99 12%	318 38%	356 42%	48 6%	<b>838</b> <b>100%</b>
Mediterranean Partner Countries	13 3%	53 14%	136 36%	155 41%	19 5%	<b>376</b> <b>100%</b>
EU-28	1 0%	40 9%	164 38%	197 46%	26 6%	<b>428</b> <b>100%</b>
Maghreb	4 3%	20 14%	72 50%	43 30%	4 3%	<b>143</b> <b>100%</b>
Mashreq	5 3%	21 14%	43 29%	71 48%	8 5%	<b>148</b> <b>100%</b>
Mediterranean EU Countries	1 1%	25 15%	57 33%	79 46%	9 5%	<b>171</b> <b>100%</b>
Rest of EU	0 0%	15 6%	107 42%	118 46%	17 7%	<b>257</b> <b>100%</b>
European non-EU	1 2%	8 18%	12 27%	18 40%	6 13%	<b>17</b> <b>100%</b>

**Assessing the impact of Turkey in the Southern Mediterranean countries**

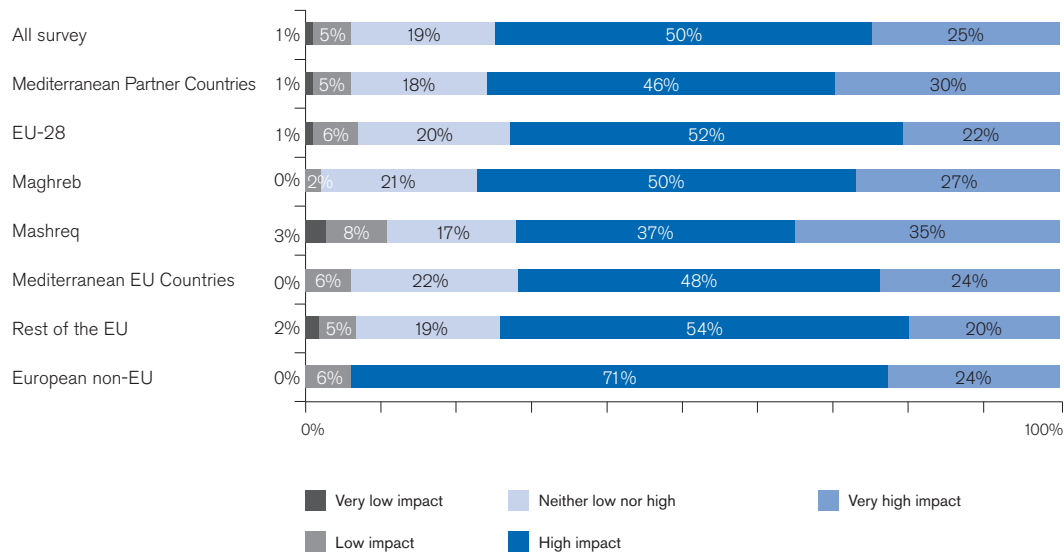


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**United States of America**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	9 1%	46 5%	158 19%	416 50%	209 25%	<b>838</b> <b>100%</b>
Mediterranean Partner Countries	5 1%	19 5%	66 18%	174 46%	112 30%	<b>376</b> <b>100%</b>
EU-28	4 1%	24 6%	85 20%	221 52%	94 22%	<b>428</b> <b>100%</b>
Maghreb	0 0%	3 2%	30 21%	72 50%	38 27%	<b>143</b> <b>100%</b>
Mashreq	4 3%	12 8%	25 17%	55 37%	52 35%	<b>148</b> <b>100%</b>
Mediterranean EU Countries	0 0%	10 6%	38 22%	82 48%	41 24%	<b>171</b> <b>100%</b>
Rest of EU	4 2%	14 5%	48 19%	139 54%	52 20%	<b>257</b> <b>100%</b>
European non-EU	0 0%	1 6%	0 0%	12 71%	4 24%	<b>17</b> <b>100%</b>

**Assessing the impact of the United States of America in the Southern Mediterranean countries**

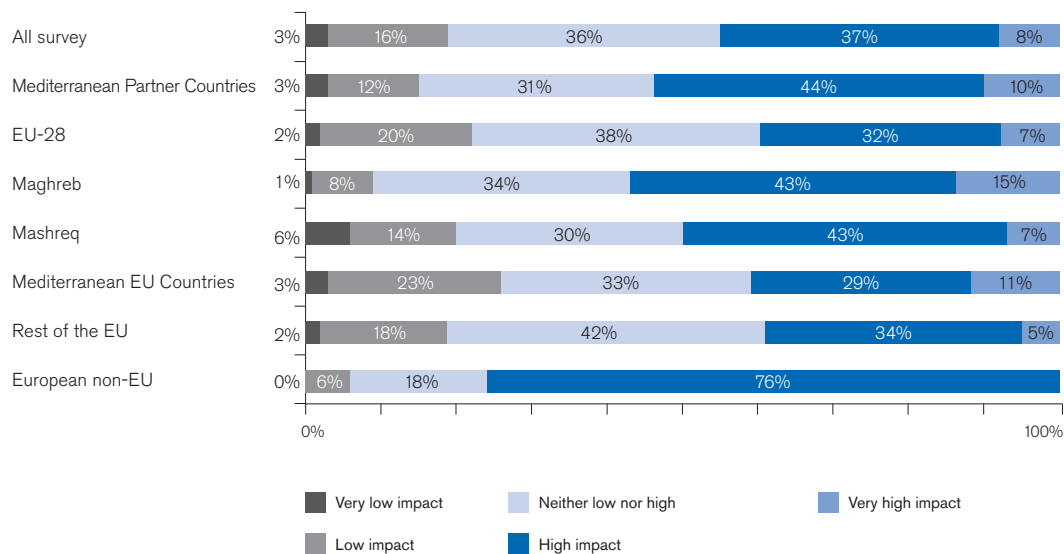


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**European Union**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	22 3%	137 16%	299 36%	312 37%	68 8%	838 100%
Mediterranean Partner Countries	13 3%	46 12%	115 31%	164 44%	38 10%	376 100%
EU-28	10 2%	87 20%	164 38%	136 32%	31 7%	428 100%
Maghreb	1 1%	11 8%	48 34%	62 43%	21 15%	143 100%
Mashreq	9 6%	21 14%	45 30%	63 43%	10 7%	148 100%
Mediterranean EU Countries	5 3%	40 23%	57 33%	50 29%	19 11%	171 100%
Rest of EU	4 2%	47 18%	107 42%	87 34%	12 5%	257 100%
European non-EU	0 0%	1 6%	3 18%	13 76%	0 0%	17 100%

**Assessing the impact of European Union in the Southern Mediterranean countries**

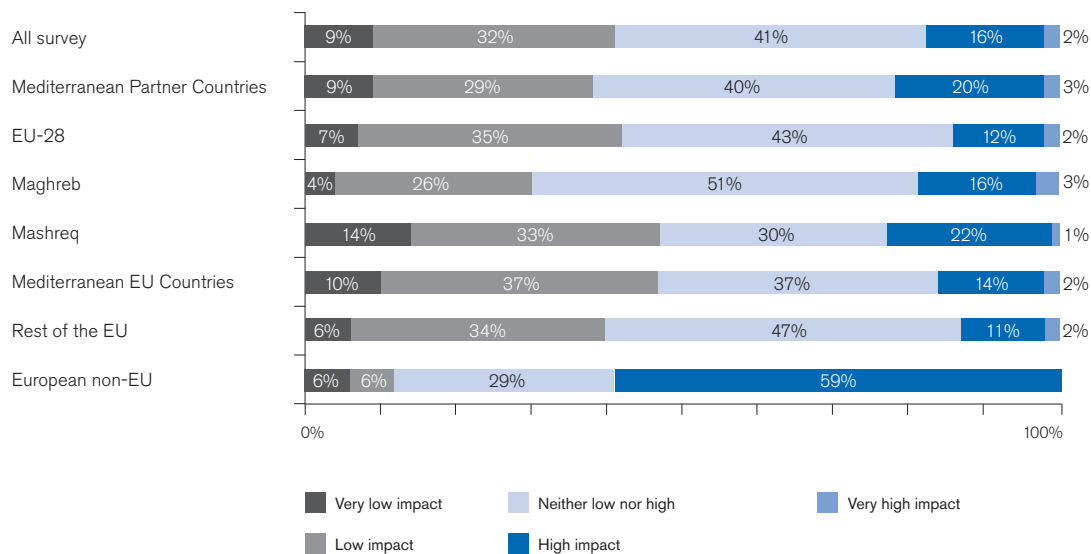


**B3. How much impact does each of the following international players have in the Southern Mediterranean countries?**

**United Nations**

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total
All survey	73 9%	268 32%	346 41%	132 16%	19 2%	838 100%
Mediterranean Partner Countries	35 9%	108 29%	151 40%	74 20%	10 3%	376 100%
EU-28	31 7%	151 35%	185 43%	51 12%	10 2%	428 100%
Maghreb	6 4%	36 26%	72 51%	23 16%	4 3%	143 100%
Mashreq	20 14%	49 33%	45 30%	33 22%	1 1%	148 100%
Mediterranean EU Countries	17 10%	63 37%	63 37%	24 14%	4 2%	171 100%
Rest of EU	15 6%	87 34%	121 47%	28 11%	6 2%	257 100%
European non-EU	1 6%	1 6%	5 29%	10 59%	0 0%	17 100%

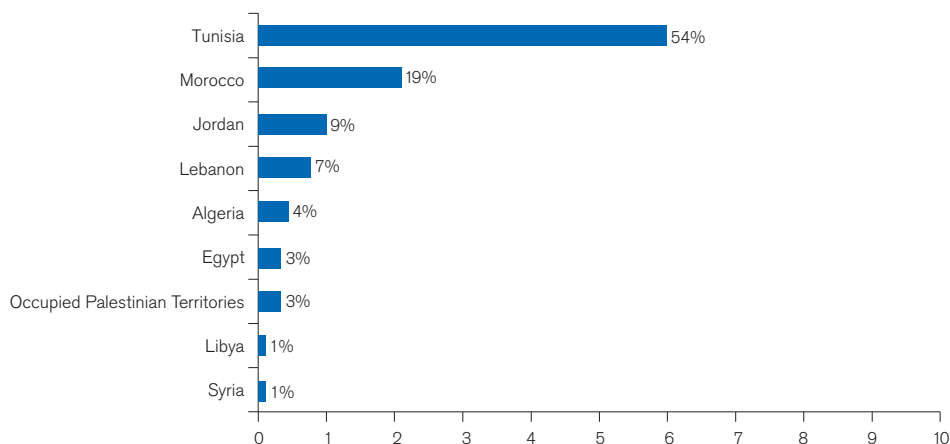
**Assessing the impact of the United Nations in the Southern Mediterranean countries**



**B4. Please arrange the following countries according to their likelihood of having better prospects for the consolidation of a democratic regime**

Total Survey		Algeria	Egypt	Jordan	Lebanon	Libya	Morocco	Occupied Palestinian Territories	Syria	Tunisia	Total
1st		36	27	72	57	5	163	21	5	452	<b>838</b>
		4%	3%	9%	7%	1%	19%	3%	1%	54%	<b>100%</b>
2nd		27	294	297	326	349	371	394	416	439	<b>2912</b>
		1%	10%	10%	11%	12%	13%	14%	14%	15%	<b>100%</b>
3rd		72	294	297	326	349	371	394	416	439	<b>2957</b>
		2%	10%	10%	11%	12%	13%	13%	14%	15%	<b>100%</b>
4th		57	294	297	326	349	371	394	416	439	<b>2942</b>
		2%	10%	10%	11%	12%	13%	14%	14%	15%	<b>100%</b>
5th		5	294	297	326	349	371	394	416	439	<b>2890</b>
		0%	10%	10%	11%	12%	13%	13%	14%	15%	<b>100%</b>
6th		162	294	297	326	349	371	394	416	439	<b>3047</b>
		5%	10%	10%	11%	12%	13%	14%	14%	14%	<b>100%</b>
7th		21	294	297	326	349	371	394	416	439	<b>2906</b>
		1%	10%	10%	11%	12%	13%	14%	14%	15%	<b>100%</b>
8th		5	294	297	326	349	371	394	416	439	<b>2890</b>
		0%	10%	10%	11%	12%	13%	14%	14%	15%	<b>100%</b>
9th		425	294	297	326	349	371	394	416	439	<b>3337</b>
		14%	9%	9%	10%	10%	11%	12%	12%	13%	<b>100%</b>

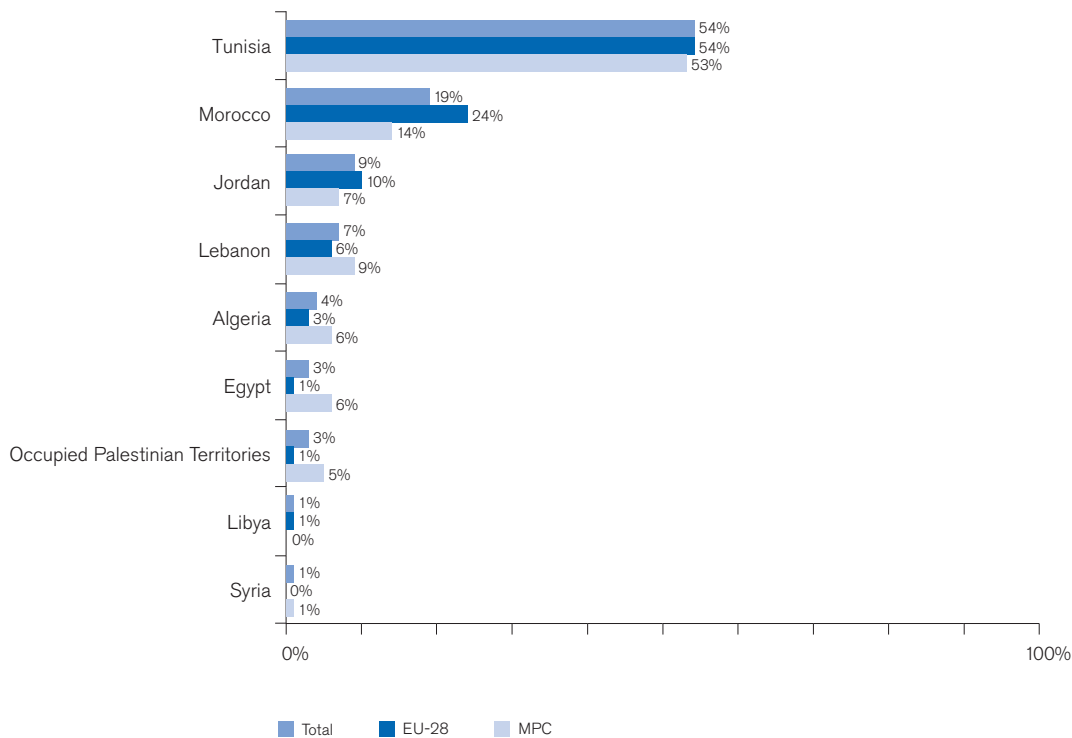
**Order of countries according to their likelihood of having better prospects for the consolidation of a democratic regime**



**B4. Please arrange the following countries according to their likelihood of having better prospects for the consolidation of a democratic regime**

Total Survey										
	Algeria	Egypt	Jordan	Lebanon	Libya	Morocco	Occupied Palestinian Territories	Syria	Tunisia	Total
MPC Countries	21	21	26	34	1	52	17	3	201	<b>376</b>
	6%	6%	7%	9%	0%	14%	5%	1%	53%	<b>100%</b>
EU-28	15	6	42	24	4	101	5	2	230	<b>429</b>
	3%	1%	10%	6%	1%	24%	1%	0%	54%	<b>100%</b>
TOTAL	36	27	72	57	5	163	21	5	452	<b>838</b>
	4%	3%	9%	7%	1%	19%	3%	1%	54%	<b>100%</b>

**Countries ordered by likelihood of having better prospects for the consolidation of a democratic regime**

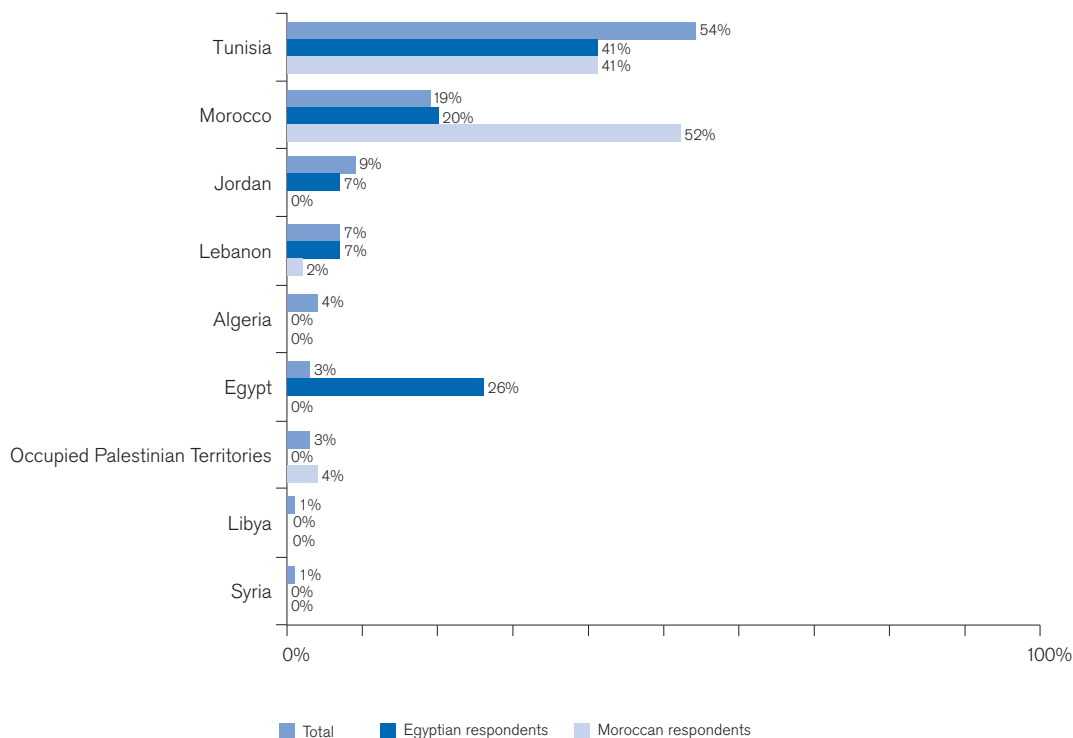


**B4. Please arrange the following countries according to their likelihood of having better prospects for the consolidation of a democratic regime**

**Total Survey**

	Algeria	Egypt	Jordan	Lebanon	Libya	Morocco	Occupied Palestinian Territories	Syria	Tunisia	Total
Moroccan respondents	0	0	0	1	0	24	2	0	19	46
	0%	0%	0%	2%	0%	52%	4%	0%	41%	100%
Egyptian respondents	0	12	3	3	0	9	0	0	19	46
	0%	26%	7%	7%	0%	20%	0%	0%	41%	100%
TOTAL	36	27	72	57	5	163	21	5	452	838
	4%	3%	9%	7%	1%	19%	3%	1%	54%	100%

**Countries ordered by likelihood of having better prospects for the consolidation of a democratic regime**



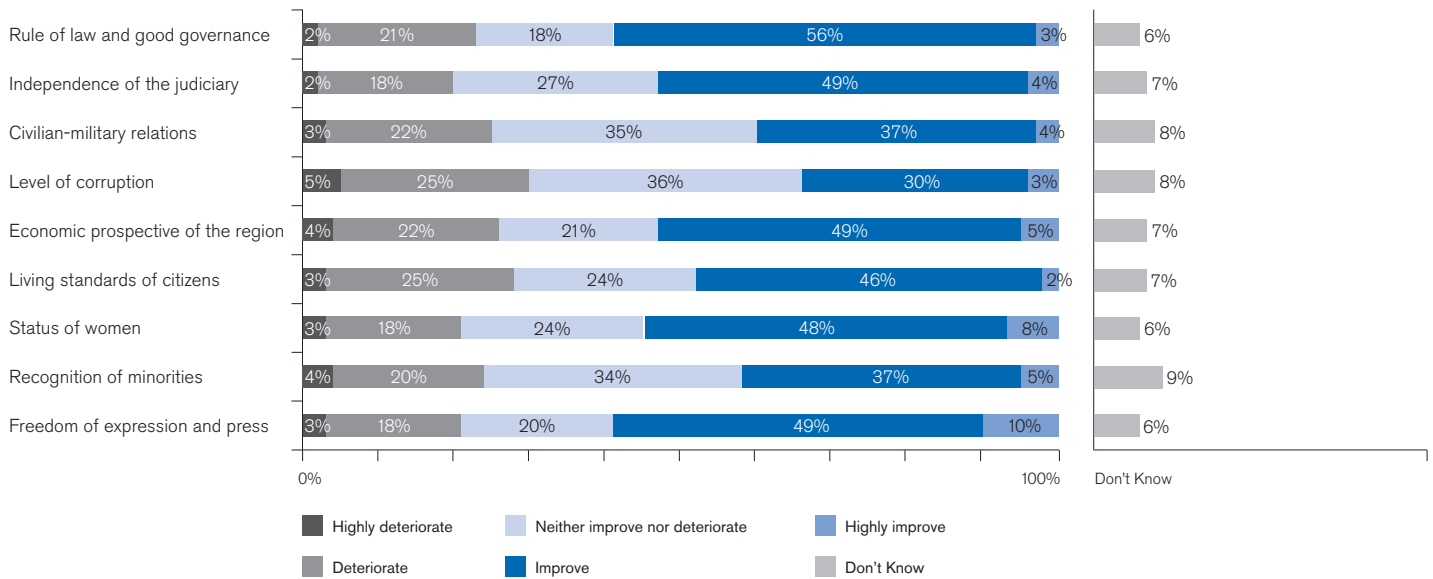
**B5. In the long term, how much will the following elements improve or deteriorate?**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Rule of law and good governance	17	166	139	436	26	784	53	837
	2%	21%	18%	56%	3%	100%	6%	
Independence of the judiciary	18	144	211	382	28	783	55	838
	2%	18%	27%	49%	4%	100%	7%	
Civilian-military relations	21	165	271	282	28	767	71	838
	3%	22%	35%	37%	4%	100%	8%	
Level of corruption	39	197	280	234	24	774	64	838
	5%	25%	36%	30%	3%	100%	8%	
Economic prospective of the region	31	169	162	381	40	783	55	838
	4%	22%	21%	49%	5%	100%	7%	
Living standards of citizens	27	194	188	356	17	782	56	838
	3%	25%	24%	46%	2%	100%	7%	
Status of women	26	142	186	375	60	789	50	839
	3%	18%	24%	48%	8%	100%	6%	
Recognition of minorities	33	152	258	285	35	763	75	838
	4%	20%	34%	37%	5%	100%	9%	
Freedom of expression and press	27	143	153	383	78	784	54	838
	3%	18%	20%	49%	10%	100%	6%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term in the SOUTHERN MEDITERRANEAN REGION**



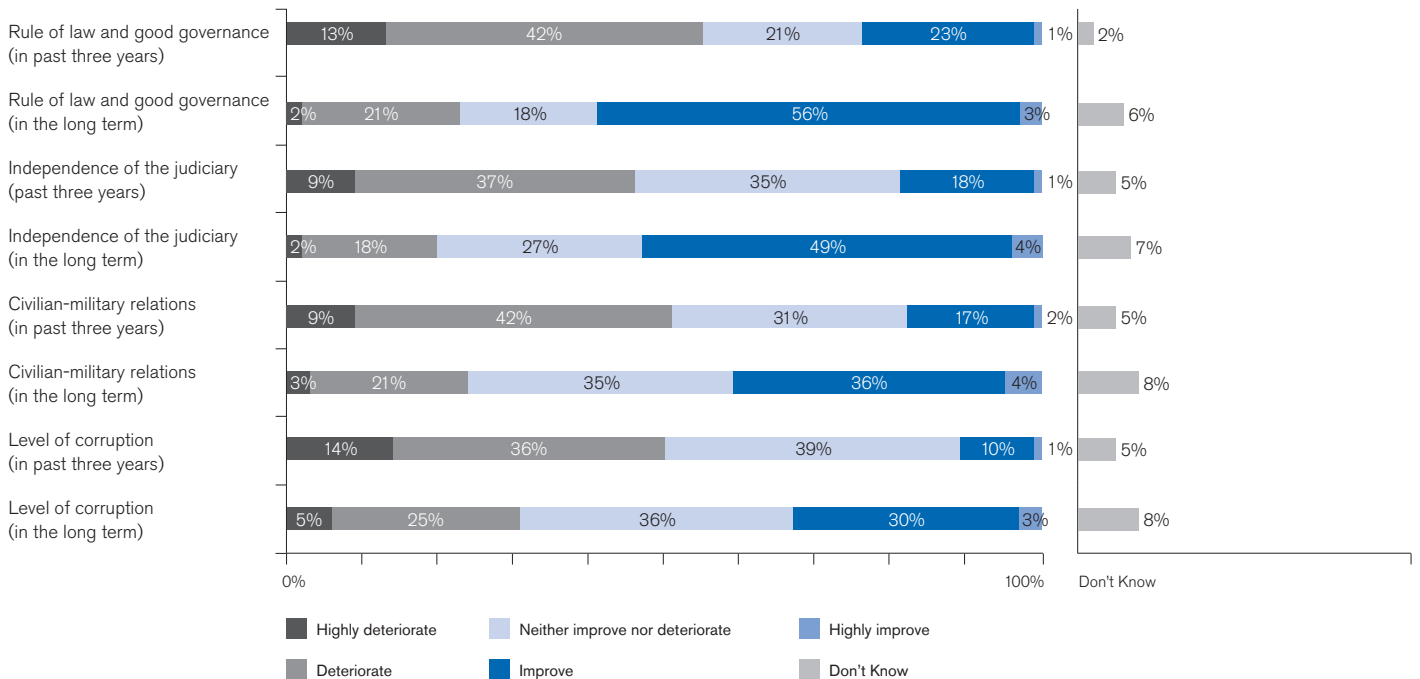
**B.5 In the long term, how much will the following elements improve or deteriorate?**

Comparing results in the past three years and in the long term	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Rule of law and good governance (in past three years)	107	347	171	190	7	822	16	838
	13%	42%	21%	23%	1%	100%	2%	
Rule of law and good governance (in the long term)	17	166	139	436	26	784	54	838
	2%	21%	18%	56%	3%	100%	6%	
Independence of the judiciary (past three years)	68	296	277	144	11	796	42	838
	9%	37%	35%	18%	1%	100%	5%	
Independence of the judiciary (in the long term)	18	144	211	382	28	783	55	838
	2%	18%	27%	49%	4%	100%	7%	
Civilian-military relations (in past three years)	73	332	246	133	13	797	41	838
	9%	42%	31%	17%	2%	102%	5%	
Civilian-military relations (in the long term)	21	165	271	282	28	767	71	838
	3%	21%	35%	36%	4%	98%	8%	
Level of corruption (in past three years)	115	283	306	82	8	794	44	838
	14%	36%	39%	10%	1%	100%	5%	
Level of corruption (in the long term)	39	197	280	234	24	774	64	838
	5%	25%	36%	30%	3%	100%	8%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

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



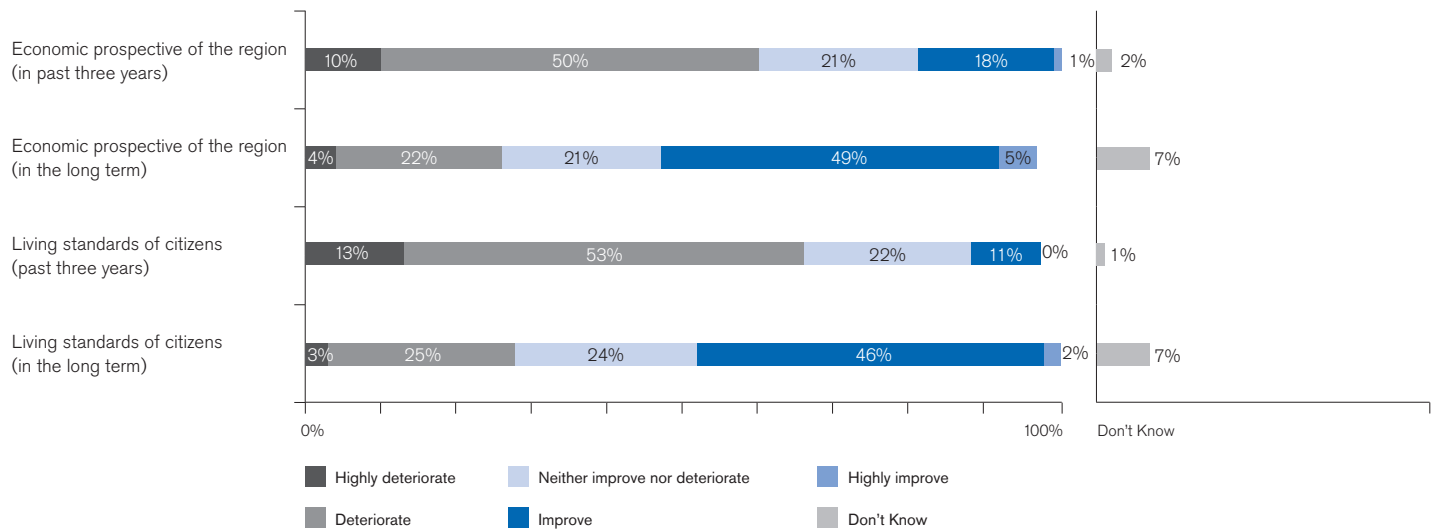
**B5. In the long term, how much will the following elements improve or deteriorate?**

Comparing results in the past three years and in the long term	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Economic prospective of the region (in past three years)	84	411	175	145	7	822	16	838
	10%	50%	21%	18%	1%	100%	2%	
Economic prospective of the region (in the long term)	31	169	162	381	40	783	55	838
	4%	22%	21%	49%	5%	100%	7%	
Living standards of citizens (past three years)	111	439	180	92	4	826	12	838
	13%	53%	22%	11%	0%	100%	1%	
Living standards of citizens (in the long term)	27	194	188	356	17	782	56	838
	3%	25%	24%	46%	2%	100%	7%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Comparing the improvement or deterioration in the past three years and in the long term on economical elements**



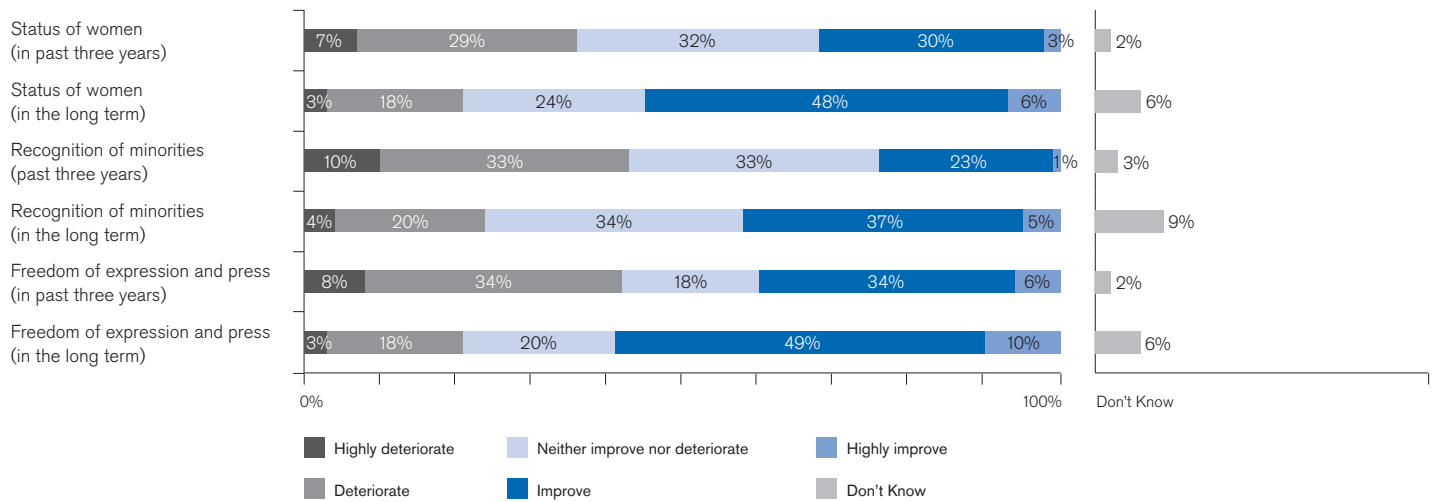
**B5. In the long term, how much will the following elements improve or deteriorate?**

Comparing results in the past three years and in the long term	Comparing results in the past three years and in the long term						Total*	Dkn	Total**
	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*			
Status of women (in past three years)	54	236	265	243	24	822	16	838	
	7%	29%	32%	30%	3%	100%	2%		
Status of women (in the long term)	26	142	186	375	60	789	49	838	
	3%	18%	24%	48%	8%	100%	6%		
Recognition of minorities (past three years)	82	267	267	184	11	811	27	838	
	10%	33%	33%	23%	1%	100%	3%		
Recognition of minorities (in the long term)	33	152	258	285	35	763	75	838	
	4%	20%	34%	37%	5%	100%	9%		
Freedom of expression and press (in past three years)	63	277	151	283	51	825	13	838	
	8%	34%	18%	34%	6%	100%	2%		
Freedom of expression and press (in the long term)	27	143	153	383	78	784	54	838	
	3%	18%	20%	49%	10%	100%	6%		

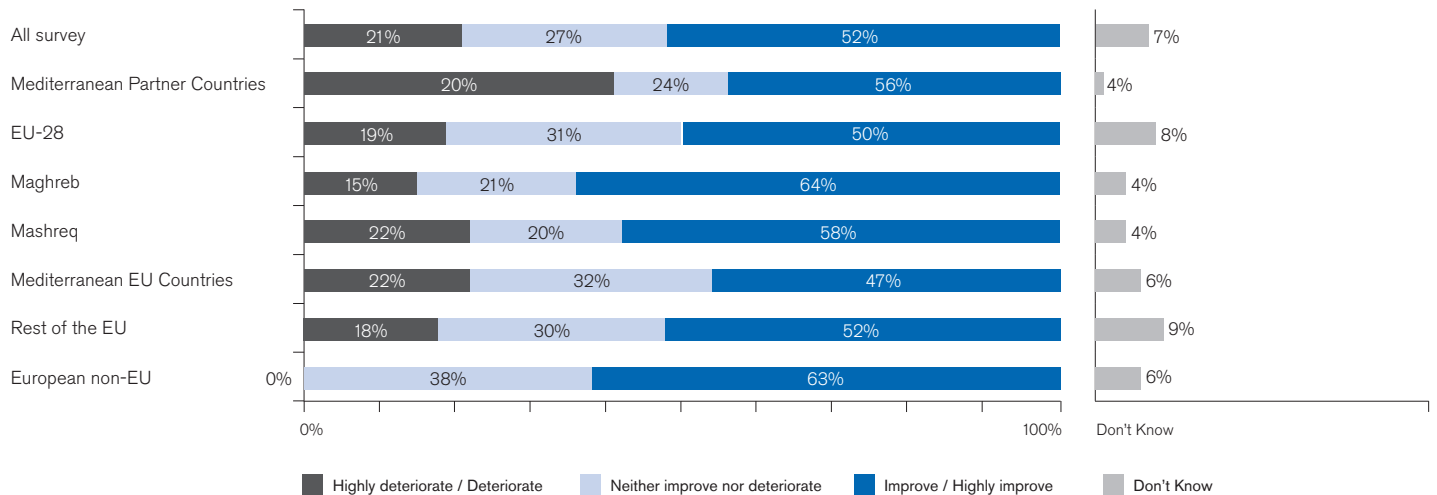
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

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



**Assessing the improvement or deterioration in the long term of the Independence of the Judiciary; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Independence of the Judiciary:  
Maghreb**

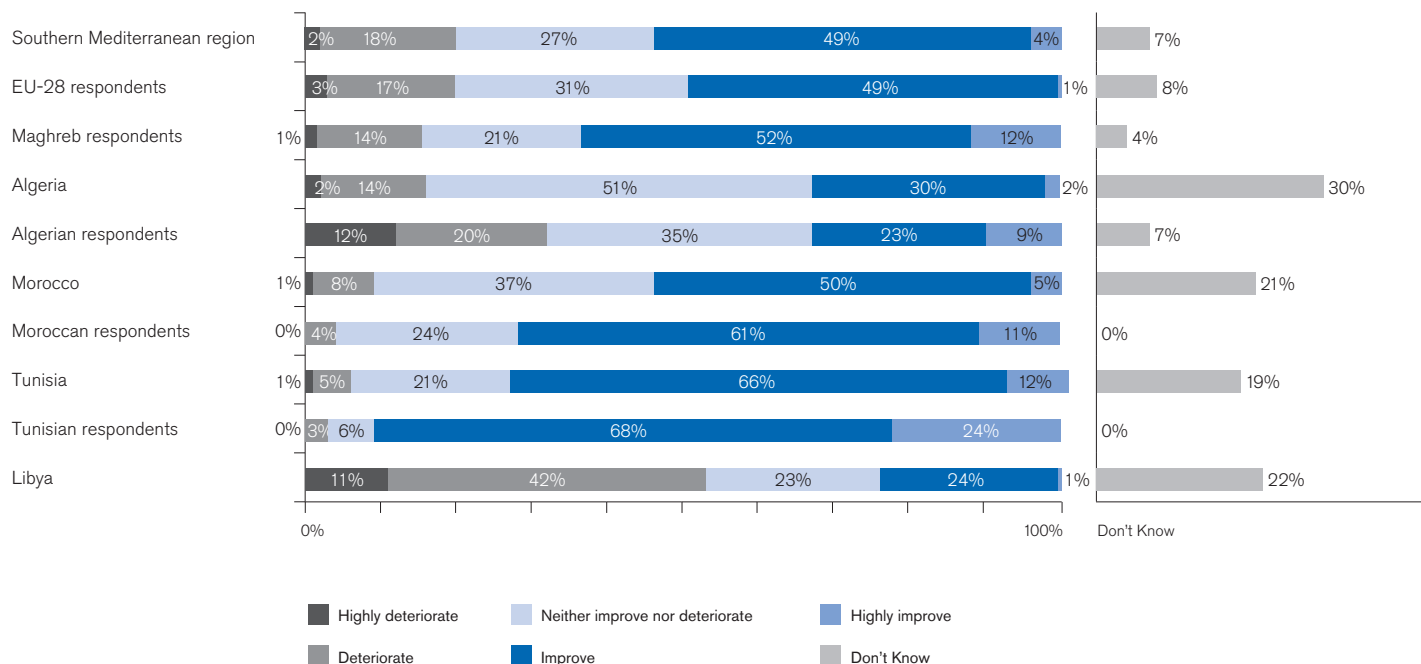
	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	18	144	211	382	28	783	55	838
	2%	18%	27%	49%	4%	100%	7%	
EU-28 respondents	10	67	121	193	4	395	33	428
	3%	17%	31%	49%	1%	100%	8%	
Maghreb respondents	1	19	29	71	17	137	6	143
	1%	14%	21%	52%	12%	100%	4%	
Algeria	14	85	300	179	12	590	248	838
	2%	14%	51%	30%	2%	100%	30%	
Algerian respondents	5	11	15	10	2	43	3	46
	12%	26%	35%	23%	5%	100%	7%	
Morocco	4	54	245	331	32	666	172	838
	1%	8%	37%	50%	5%	100%	21%	
Moroccan respondents	0	2	11	28	5	46	0	46
	0%	4%	24%	61%	11%	100%	0%	
Tunisia	4	35	135	428	75	677	161	838
	1%	5%	21%	66%	12%	104%	19%	
Tunisian respondents	0	1	2	23	8	34	0	34
	0%	3%	6%	68%	24%	100%	0%	
Libya	71	270	148	154	7	650	188	838
	11%	42%	23%	24%	1%	100%	22%	

(\* ) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the last three years in the: INDEPENDENCE OF THE JUDICIARY**



**B5. In the long term, how much will the following elements improve or deteriorate?**

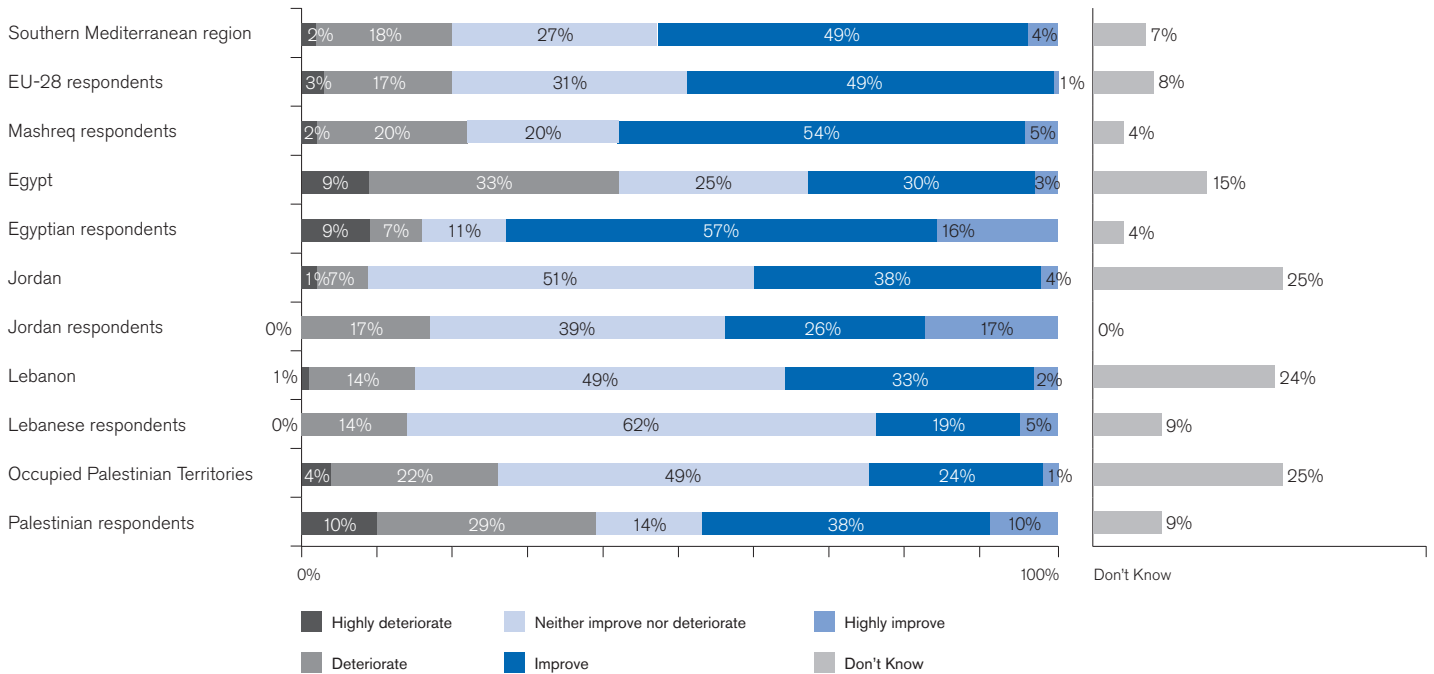
**Independence of the Judiciary:  
Mashreq**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	18	144	211	382	28	783	55	838
	2%	18%	27%	49%	4%	100%	7%	
EU-28 respondents	10	67	121	193	4	395	33	428
	3%	17%	31%	49%	1%	100%	8%	
Mashreq respondents	3	28	28	76	7	142	6	148
	2%	20%	20%	54%	5%	100%	4%	
Egypt	61	236	182	216	21	716	122	838
	9%	33%	25%	30%	3%	100%	15%	
Egyptian respondents	4	3	5	25	7	44	2	46
	9%	7%	11%	57%	16%	100%	4%	
Jordan	5	45	318	236	24	628	210	838
	1%	7%	51%	38%	4%	100%	25%	
Jordan respondents	0	4	9	6	4	23	0	23
	0%	17%	39%	26%	17%	100%	0%	
Lebanon	8	91	313	212	13	637	201	838
	1%	14%	49%	33%	2%	100%	24%	
Lebanese respondents	0	5	8	7	1	21	2	23
	0%	24%	38%	33%	5%	100%	9%	
Occupied Palestinian Territories	23	138	310	152	8	631	207	838
	4%	22%	49%	24%	1%	100%	25%	
Palestinian respondents	2	6	3	8	2	21	2	23
	10%	29%	14%	38%	10%	100%	9%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: INDEPENDENCE OF THE JUDICIARY**



**B5. In the long term, how much will the following elements improve or deteriorate?**

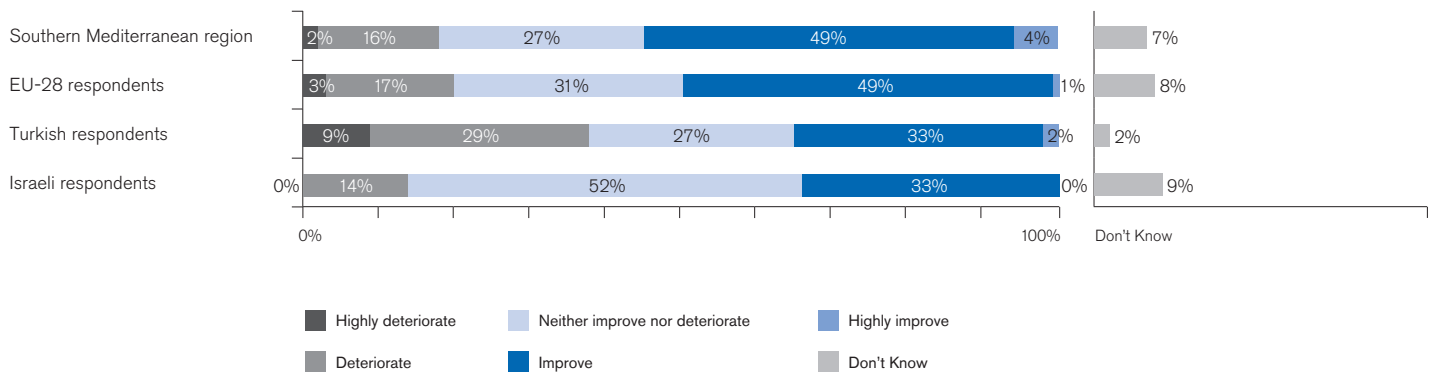
**Independence of the Judiciary:  
Turkey and Israel**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	18	144	211	382	28	783	55	838
	2%	18%	27%	49%	4%	100%	7%	
EU-28 respondents	10	67	121	193	4	395	33	428
	3%	17%	31%	49%	1%	100%	8%	
Turkish respondents	4	13	12	15	1	45	1	46
	9%	29%	27%	33%	2%	100%	2%	
Israeli respondents	0	3	11	7	0	21	2	23
	0%	14%	52%	33%	0%	100%	9%	

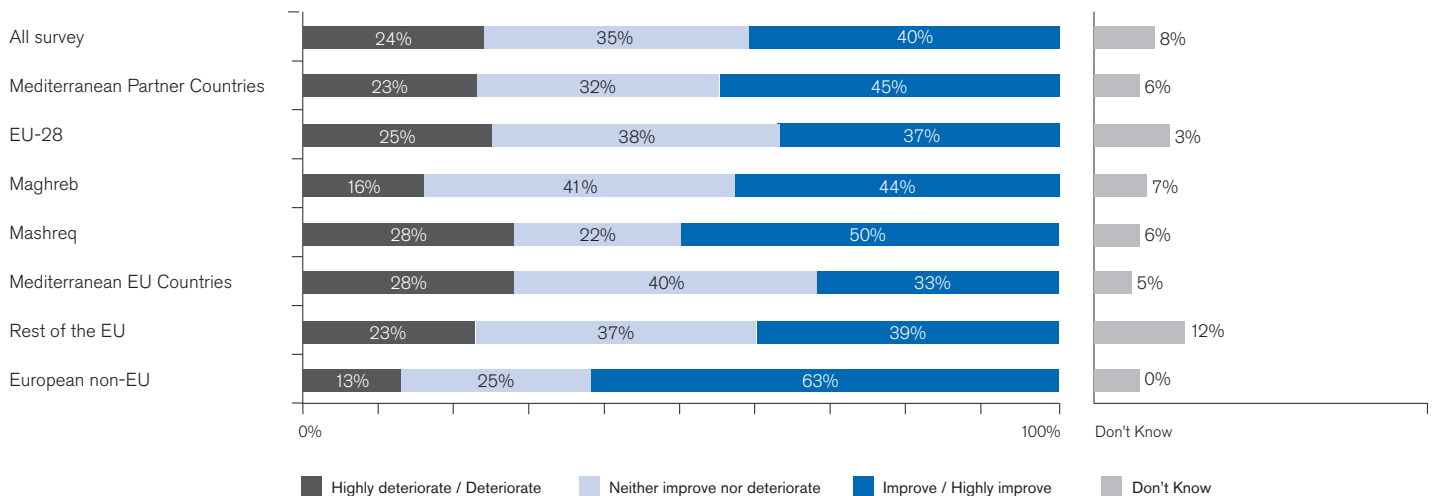
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: INDEPENDENCE OF THE JUDICIARY**



**Assessing the improvement or deterioration in the long term of civilian-military relations; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Civilian-military relations: Maghreb**

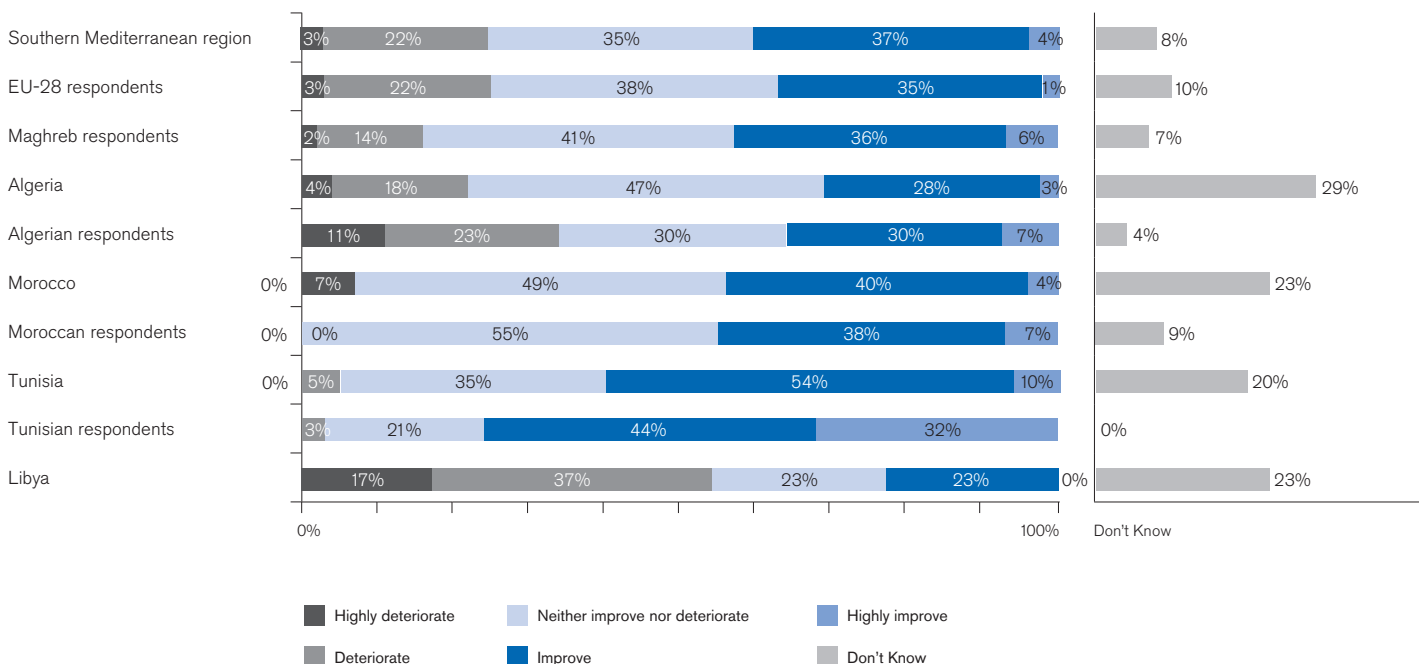
	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	21	165	271	282	28	767	71	838
	3%	22%	35%	37%	4%	100%	8%	
EU-28 respondents	13	83	148	137	5	386	42	428
	3%	22%	38%	35%	1%	100%	10%	
Maghreb respondents	2	19	54	48	10	133	10	143
	2%	14%	41%	36%	8%	100%	7%	
Algeria	24	106	281	165	16	592	246	838
	4%	18%	47%	28%	3%	100%	29%	
Algerian respondents	5	10	13	13	3	44	2	46
	11%	23%	30%	30%	7%	100%	4%	
Morocco	2	46	316	257	27	648	190	838
	0%	7%	49%	40%	4%	100%	23%	
Moroccan respondents	0	0	23	16	3	42	4	46
	0%	0%	55%	38%	7%	100%	9%	
Tunisia	5	30	228	346	63	672	166	838
	1%	5%	35%	54%	10%	104%	20%	
Tunisian respondents	0	1	7	15	11	34	0	34
	0%	3%	21%	44%	32%	100%	0%	
Libya	109	241	147	146	3	646	192	838
	17%	37%	23%	23%	0%	100%	23%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the long term of the: CIVILIAN-MILITARY RELATIONS**



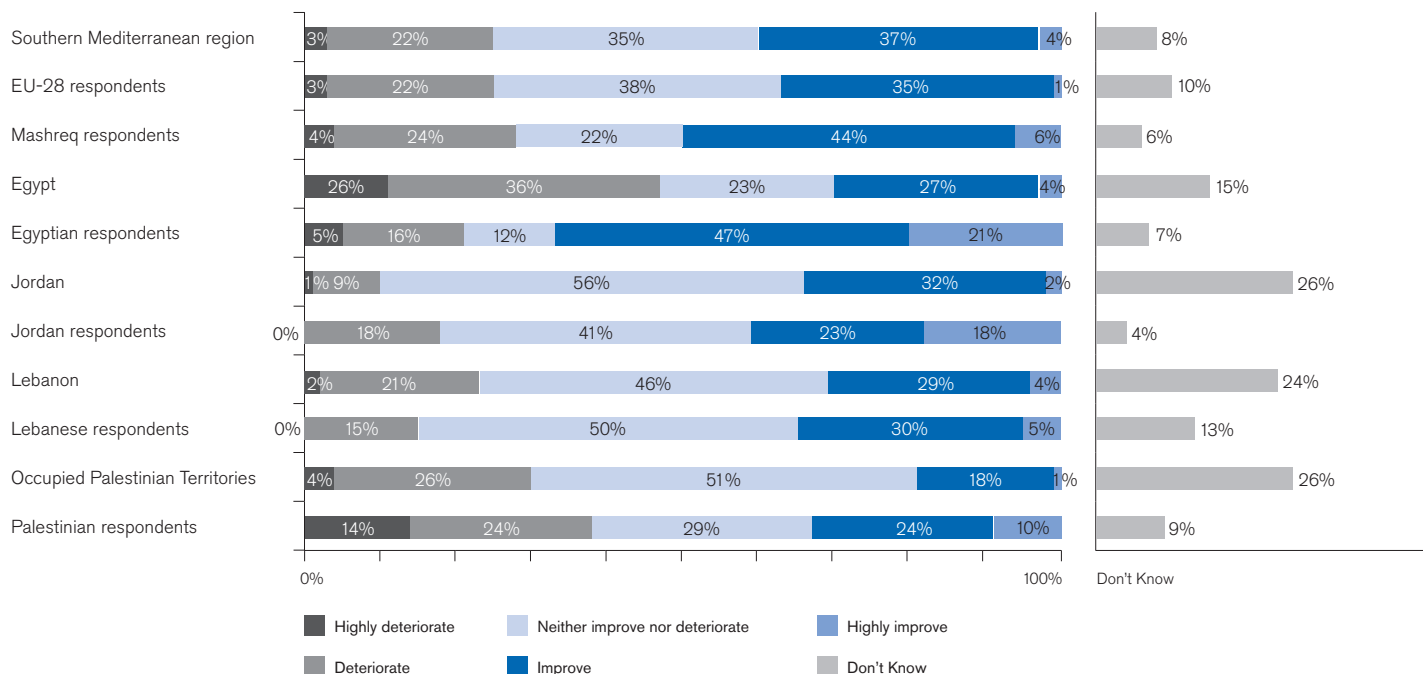
**B1. In the long term, how much will the following elements improve or deteriorate?**

Civilian-military relations: Mashreq						Total*	Dkn	Total**
	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve			
Southern Mediterranean region (all respondents)	21	165	271	282	28	767	71	838
	3%	22%	35%	37%	4%	100%	8%	
EU-28 respondents	13	83	148	137	5	386	42	428
	3%	22%	38%	35%	1%	100%	10%	
Mashreq respondents	5	34	31	61	8	139	9	148
	4%	24%	22%	44%	6%	100%	6%	
Egypt	76	254	161	190	31	712	126	838
	11%	36%	23%	27%	4%	100%	15%	
Egyptian respondents	2	7	5	20	9	43	3	46
	5%	16%	12%	47%	21%	100%	7%	
Jordan	4	53	346	200	19	622	216	838
	1%	9%	56%	32%	3%	100%	26%	
Jordan respondents	0	4	9	5	4	22	1	23
	0%	18%	41%	23%	18%	100%	4%	
Lebanon	15	133	291	186	12	637	201	838
	2%	21%	46%	29%	2%	100%	24%	
Lebanese respondents	0	3	10	6	1	20	3	23
	0%	15%	50%	30%	5%	100%	13%	
Occupied Palestinian Territories	26	164	314	111	4	619	219	838
	4%	26%	51%	18%	1%	100%	26%	
Palestinian respondents	3	5	6	5	2	21	2	23
	14%	24%	29%	24%	10%	100%	9%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: CIVILIAN-MILITARY RELATIONS**



**B5. In the long term, how much will the following elements improve or deteriorate?**

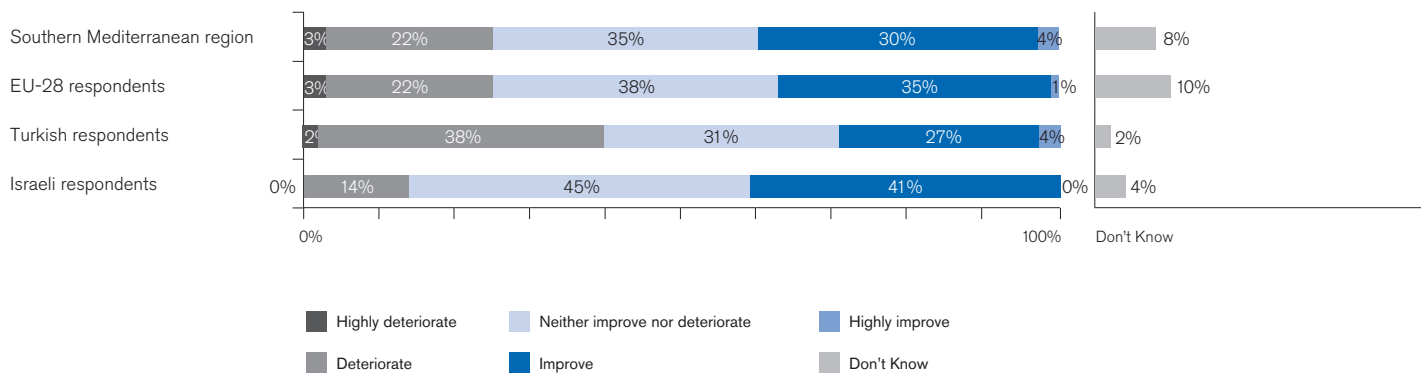
**Civilian-military relations:  
Turkey and Israel**

	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	21	165	271	282	28	767	71	838
	3%	22%	35%	37%	4%	100%	8%	
EU-28 respondents	13	83	148	137	5	386	42	428
	3%	22%	38%	35%	1%	100%	10%	
Turkish respondents	1	16	14	12	2	45	1	46
	2%	36%	31%	27%	4%	100%	2%	
Israeli respondents	0	3	10	9	0	22	1	23
	0%	14%	45%	41%	0%	100%	4%	

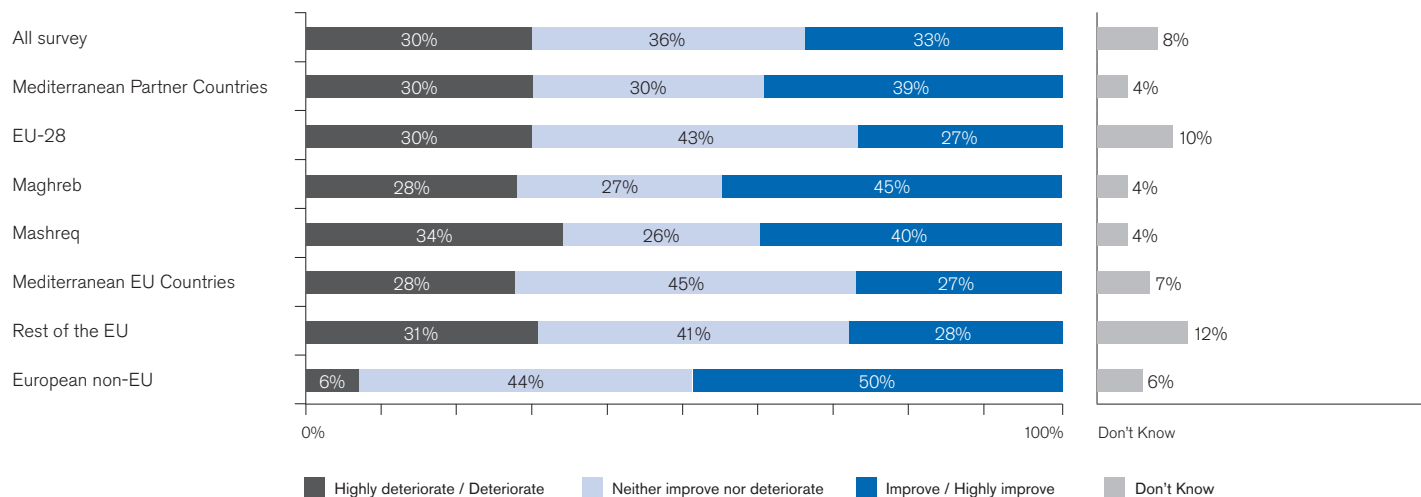
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: CIVILIAN-MILITARY RELATIONS**



**Assessing the improvement or deterioration in the long term in the level of corruption; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Level of corruption**

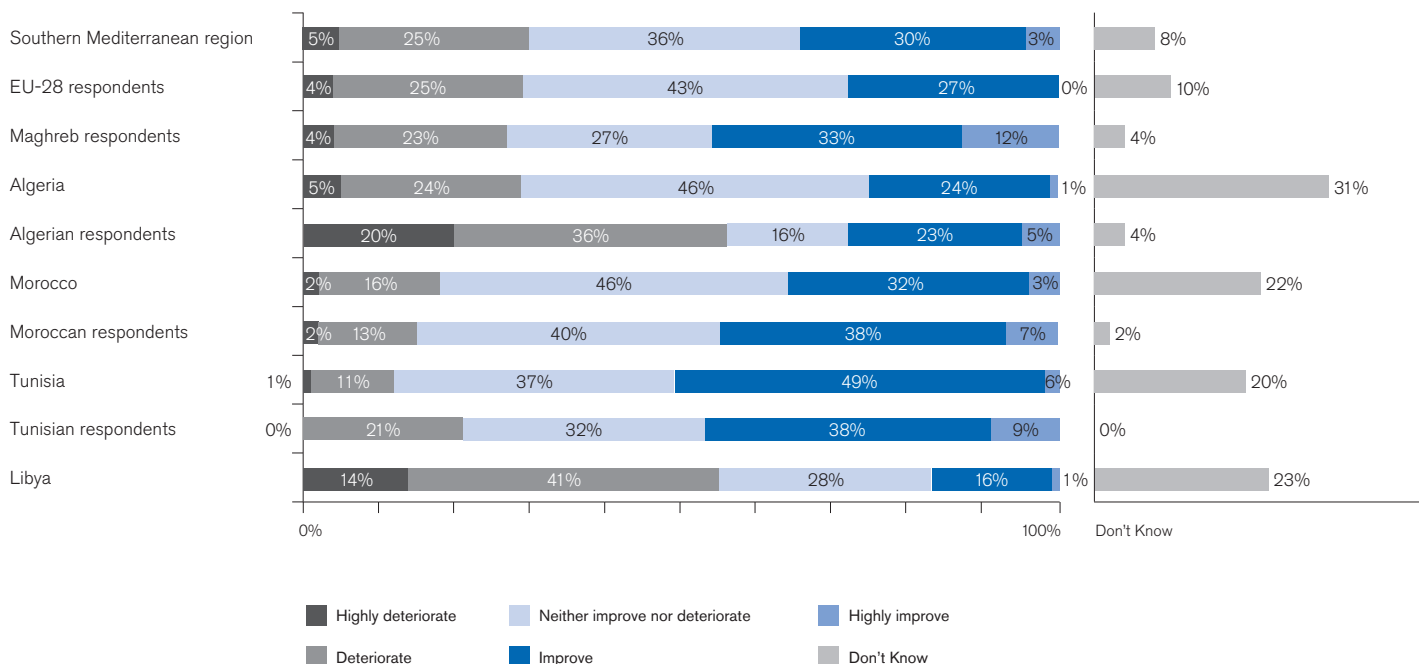
	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	39	197	280	234	24	774	64	838
	5%	25%	36%	30%	3%	100%	8%	
EU-28 respondents	17	98	165	105	1	386	42	428
	4%	25%	43%	27%	0%	100%	10%	
Maghreb respondents	6	32	37	45	17	137	6	143
	4%	23%	27%	33%	12%	100%	4%	
Algeria	28	139	269	138	7	581	257	838
	5%	24%	46%	24%	1%	100%	31%	
Algerian respondents	9	16	7	10	2	44	2	46
	20%	36%	16%	23%	5%	100%	4%	
Morocco	14	106	299	212	22	653	185	838
	2%	16%	46%	32%	3%	100%	22%	
Moroccan respondents	1	6	18	17	3	45	1	46
	2%	13%	40%	38%	7%	100%	2%	
Tunisia	8	73	238	316	37	672	166	838
	1%	11%	37%	49%	6%	105%	20%	
Tunisian respondents	0	7	11	13	3	34	0	34
	0%	21%	32%	38%	9%	100%	0%	
Libya	93	262	181	101	6	643	195	838
	14%	41%	28%	16%	1%	100%	23%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the long term in the: LEVEL OF CORRUPTION**



**B5. In the long term, how much will the following elements improve or deteriorate?**

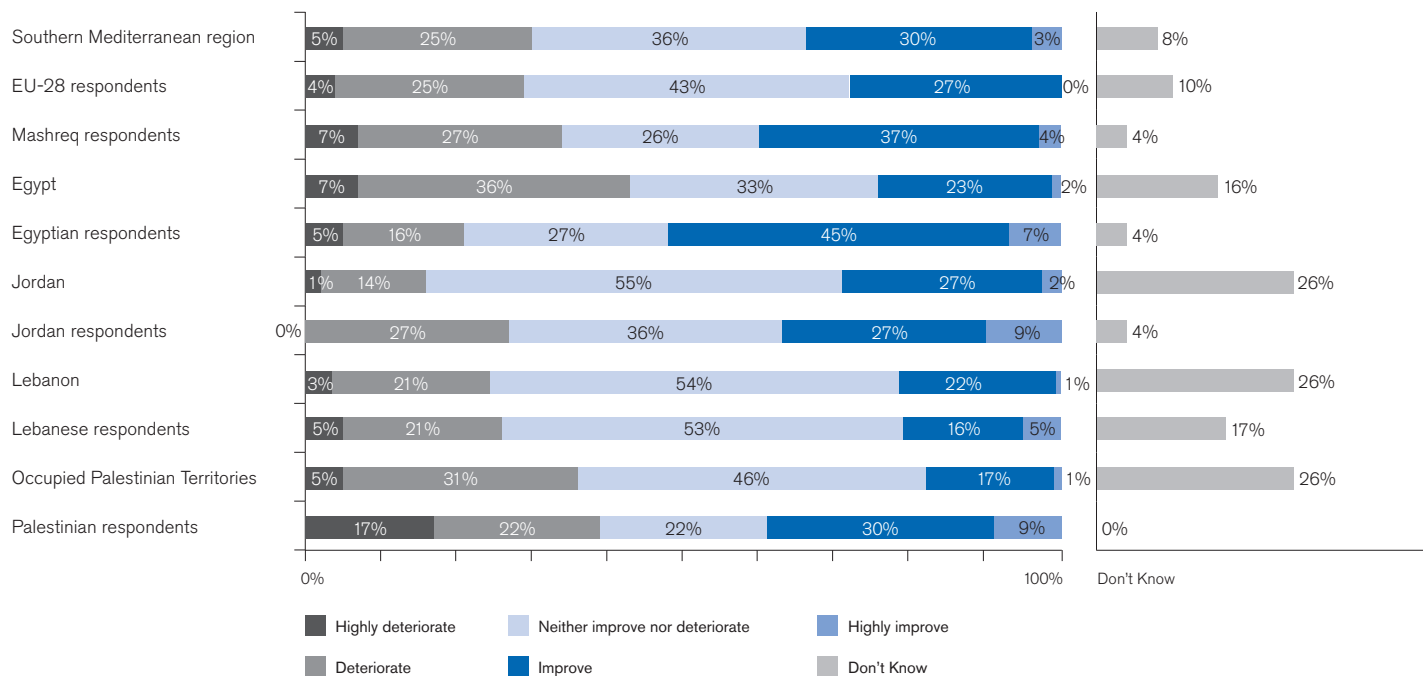
**Level of corruption**

Mashreq	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	39	197	280	234	24	774	64	838
	5%	25%	36%	30%	3%	100%	8%	
EU-28 respondents	17	98	165	105	1	386	42	428
	4%	25%	43%	27%	0%	100%	10%	
Mashreq respondents	10	38	37	52	5	142	6	148
	7%	27%	26%	37%	4%	100%	4%	
Egypt	50	251	235	160	11	707	131	838
	7%	36%	33%	23%	2%	100%	16%	
Egyptian respondents	2	7	12	20	3	44	2	46
	5%	16%	27%	45%	7%	100%	4%	
Jordan	9	84	344	169	14	620	218	838
	1%	14%	55%	27%	2%	100%	26%	
Jordan respondents	0	6	8	6	2	22	1	23
	0%	27%	36%	27%	9%	100%	4%	
Lebanon	18	128	333	135	8	622	216	838
	3%	21%	54%	22%	1%	100%	26%	
Lebanese respondents	1	4	10	3	1	19	4	23
	5%	21%	53%	16%	5%	100%	17%	
Occupied Palestinian Territories	33	193	286	103	6	621	217	838
	5%	31%	46%	17%	1%	100%	26%	
Palestinian respondents	4	5	5	7	2	23	0	23
	17%	22%	22%	30%	9%	100%	0%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term in the: LEVEL OF CORRUPTION**



**B5. In the long term, how much will the following elements improve or deteriorate?**

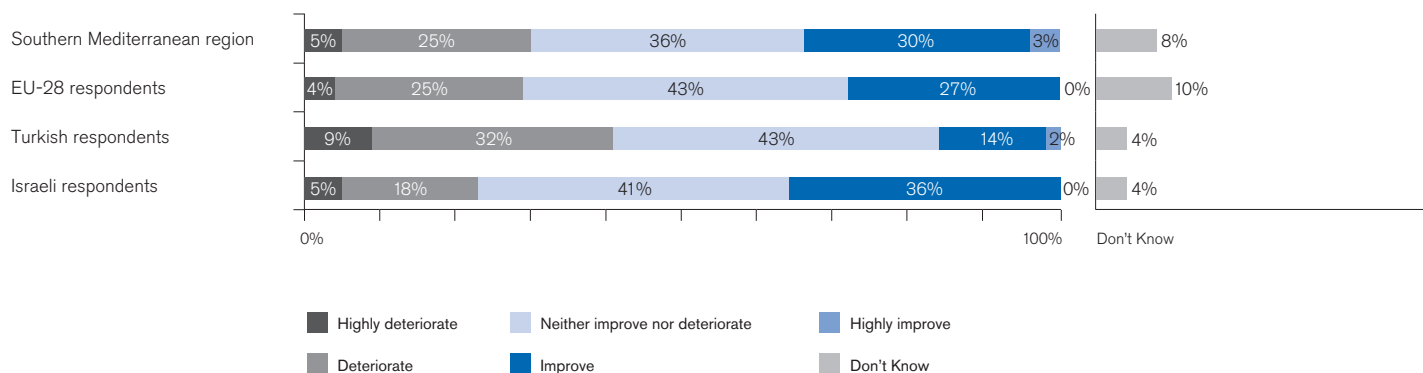
**Level of corruption**

Turkey and Israel	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	39	197	280	234	24	774	64	838
	5%	25%	36%	30%	3%	100%	8%	
EU-28 respondents	17	98	165	105	1	386	42	428
	4%	25%	43%	27%	0%	100%	10%	
Turkish respondents	4	14	19	6	1	44	2	46
	9%	32%	43%	14%	2%	100%	4%	
Israeli respondents	1	4	9	8	0	22	1	23
	5%	18%	41%	36%	0%	100%	4%	

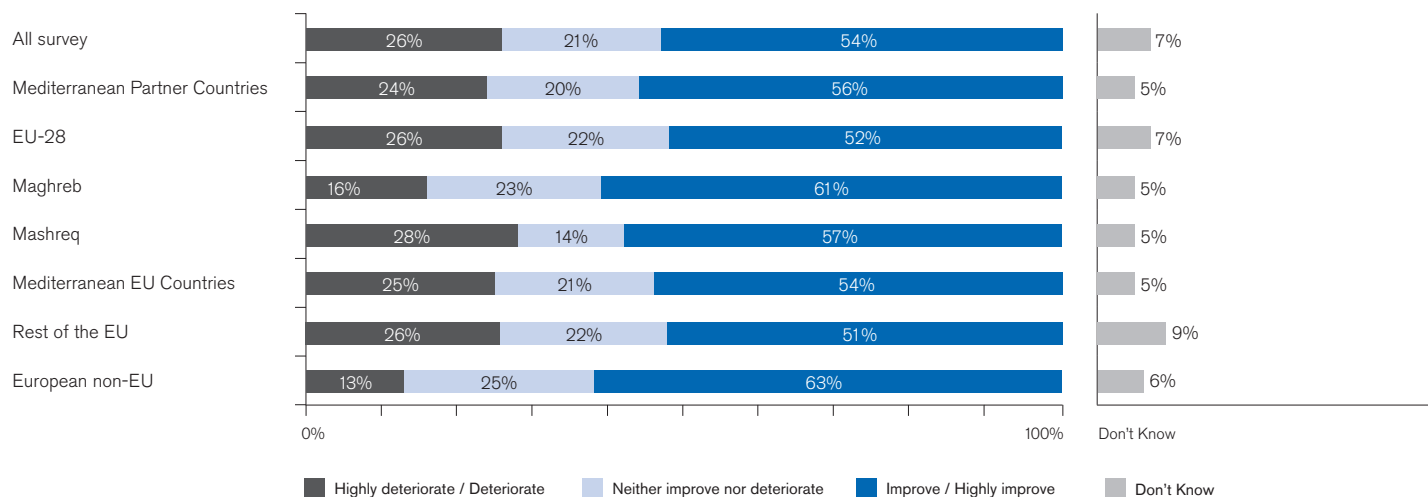
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term in the: LEVEL OF CORRUPTION**



**Assessing the improvement or deterioration in the long term of the economic perspective of the region; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Economic prospective of the region**

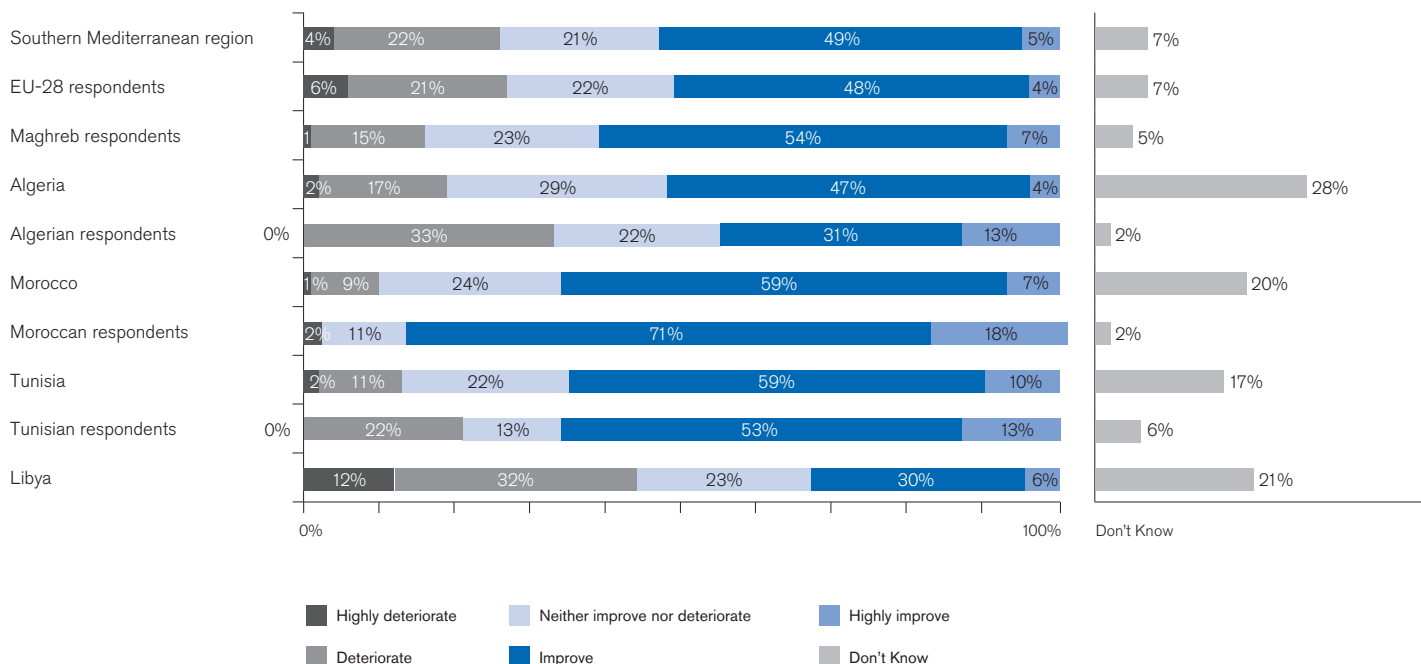
Maghreb	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	31	169	162	381	40	783	55	838
	4%	22%	21%	49%	5%	100%	7%	
EU-28 respondents	22	82	86	193	15	398	30	428
	6%	21%	22%	48%	4%	100%	7%	
Maghreb respondents	1	21	31	74	9	136	7	143
	1%	15%	23%	54%	7%	100%	5%	
Algeria	11	105	176	286	26	604	234	838
	2%	17%	29%	47%	4%	100%	28%	
Algerian respondents	0	15	10	14	6	45	1	46
	0%	33%	22%	31%	13%	100%	2%	
Morocco	9	58	161	394	48	670	168	838
	1%	9%	24%	59%	7%	100%	20%	
Moroccan respondents	0	1	5	32	7	45	1	46
	0%	2%	11%	71%	16%	100%	2%	
Tunisia	12	75	148	391	68	694	144	838
	2%	11%	22%	59%	10%	105%	17%	
Tunisian respondents	0	7	4	17	4	32	2	34
	0%	22%	13%	53%	13%	100%	6%	
Libya	81	209	153	196	23	662	176	838
	12%	32%	23%	30%	3%	100%	21%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the long term of the: ECONOMIC PROSPECTIVE OF THE REGION**



**B5. In the long term, how much will the following elements improve or deteriorate?**

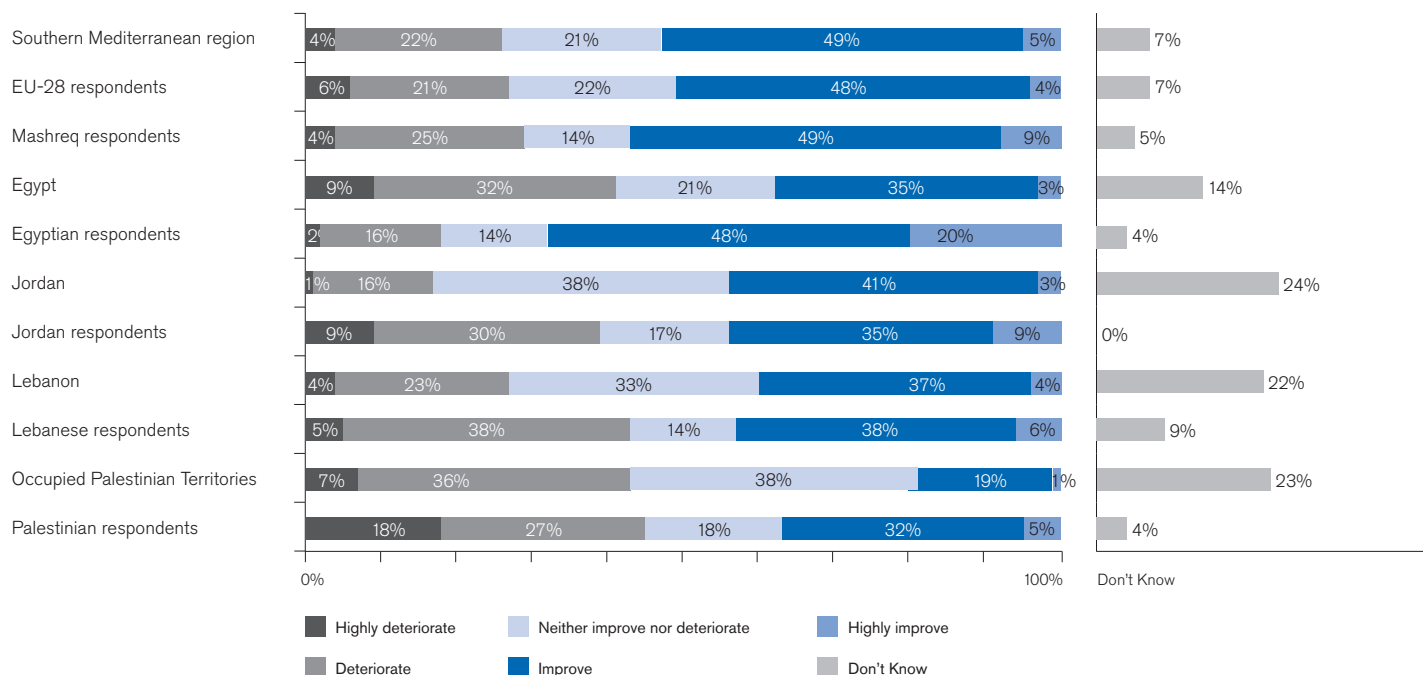
**Economic prospective of the region**

Mashreq	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	31 4%	169 22%	162 21%	381 49%	40 5%	<b>783</b> 100%	55 7%	838
EU-28 respondents	22 6%	82 21%	86 22%	193 48%	15 4%	<b>398</b> 100%	30 7%	428
Mashreq respondents	5 4%	35 25%	20 14%	69 49%	12 9%	<b>141</b> 100%	7 5%	148
Egypt	66 9%	229 32%	148 21%	252 35%	25 3%	<b>720</b> 100%	118 14%	838
Egyptian respondents	1 2%	7 16%	6 14%	21 48%	9 20%	<b>44</b> 100%	2 4%	46
Jordan	9 1%	102 16%	246 38%	261 41%	21 3%	<b>639</b> 100%	199 24%	838
Jordan respondents	2 9%	7 30%	4 17%	8 35%	2 9%	<b>23</b> 100%	0 0%	23
Lebanon	24 4%	148 23%	213 33%	243 37%	24 4%	<b>652</b> 100%	186 22%	838
Lebanese respondents	1 5%	8 38%	3 14%	8 38%	1 5%	<b>21</b> 100%	2 9%	23
Occupied Palestinian Territories	44 7%	230 36%	242 38%	122 19%	4 1%	<b>642</b> 100%	196 23%	838
Palestinian respondents	4 18%	6 27%	4 18%	7 32%	1 5%	<b>22</b> 100%	1 4%	23

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: ECONOMIC PROSPECTIVE OF THE REGION**



**B5. In the long term, how much will the following elements improve or deteriorate?**

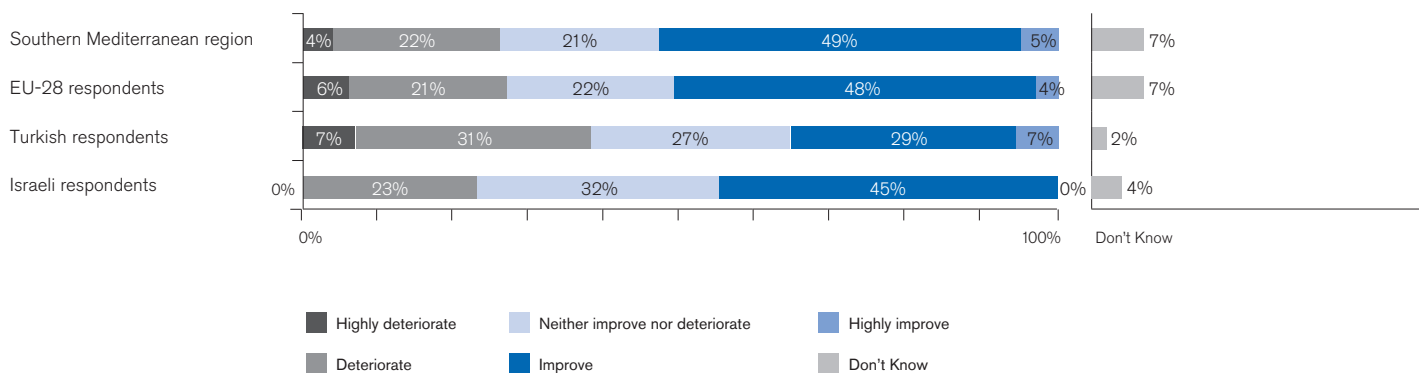
**Economic prospective of the region**

Turkey and Israel	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	31	169	162	381	40	783	55	838
	4%	22%	21%	49%	5%	100%	7%	
EU-28 respondents	22	82	86	193	15	398	30	428
	6%	21%	22%	48%	4%	100%	7%	
Turkish respondents	3	14	12	13	3	45	1	46
	7%	31%	27%	29%	7%	100%	2%	
Israeli respondents	0	5	7	10	0	22	1	23
	0%	23%	32%	45%	0%	100%	4%	

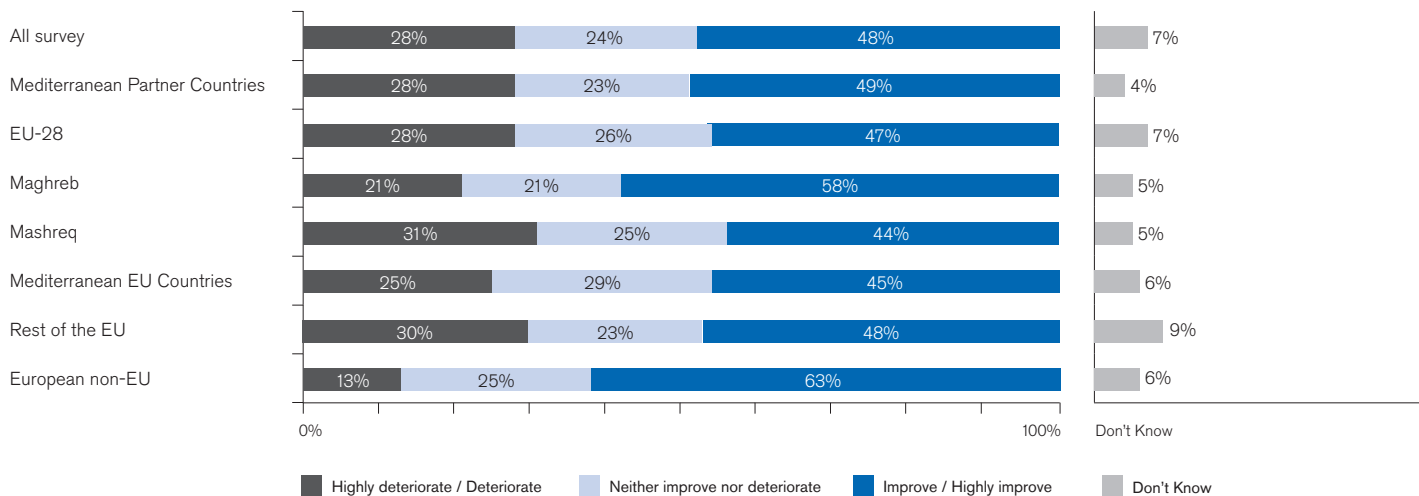
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: ECONOMIC PROSPECTIVE OF THE REGION**



**Assessing the improvement or deterioration in the long term of the living standards of citizens; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Living standards of citizens**

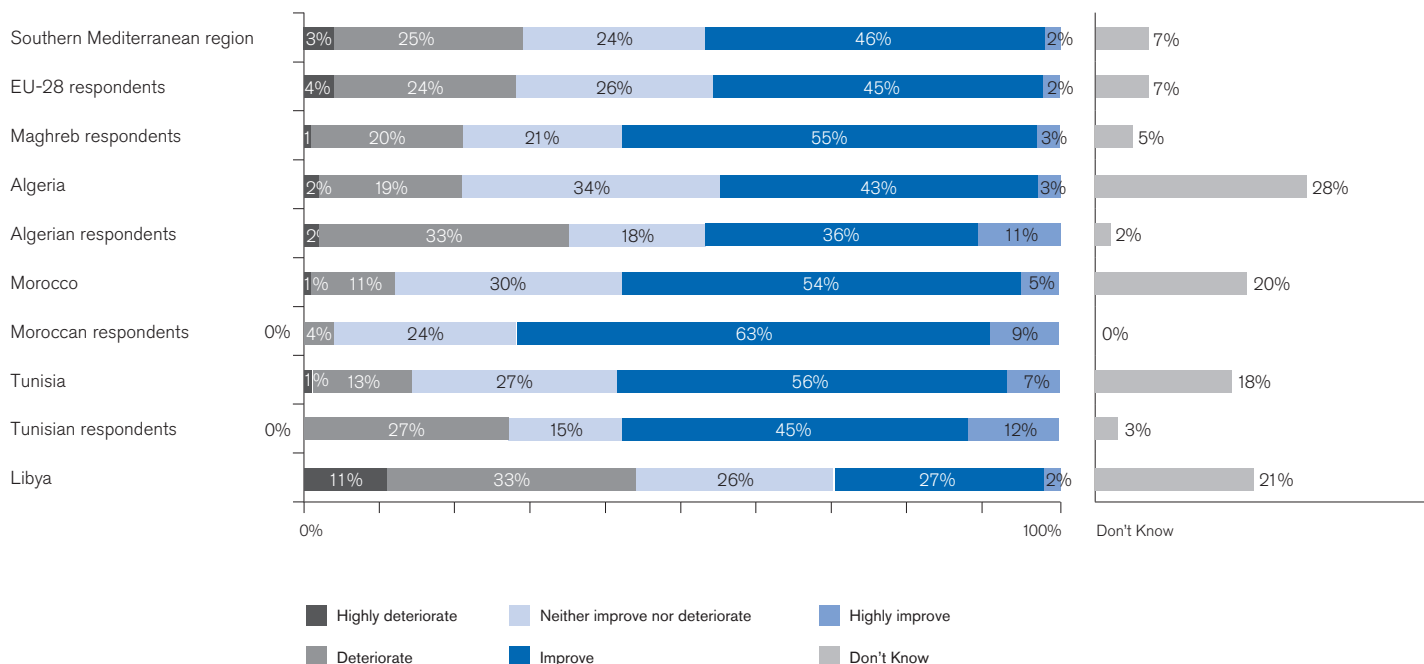
Maghreb	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	27	194	188	356	17	782	56	838
	3%	25%	24%	46%	2%	100%	7%	
EU-28 respondents	16	94	101	177	8	396	32	428
	4%	24%	26%	45%	2%	100%	7%	
Maghreb respondents	1	27	29	75	4	136	7	143
	1%	20%	21%	55%	3%	100%	5%	
Algeria	12	112	201	256	19	600	238	838
	2%	19%	34%	43%	3%	100%	28%	
Algerian respondents	1	15	8	16	5	45	1	46
	2%	33%	18%	36%	11%	100%	2%	
Morocco	6	75	199	362	31	673	165	838
	1%	11%	30%	54%	5%	100%	20%	
Moroccan respondents	0	2	11	29	4	46	0	46
	0%	4%	24%	63%	9%	100%	0%	
Tunisia	7	88	178	374	44	691	147	838
	1%	13%	27%	56%	7%	104%	18%	
Tunisian respondents	0	9	5	15	4	33	1	34
	0%	27%	15%	45%	12%	100%	3%	
Libya	76	220	173	180	14	663	175	838
	11%	33%	26%	27%	2%	100%	21%	

(\* ) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the long term of the: LIVING STANDARDS OF CITIZENS**



**B5. In the long term, how much will the following elements improve or deteriorate?**

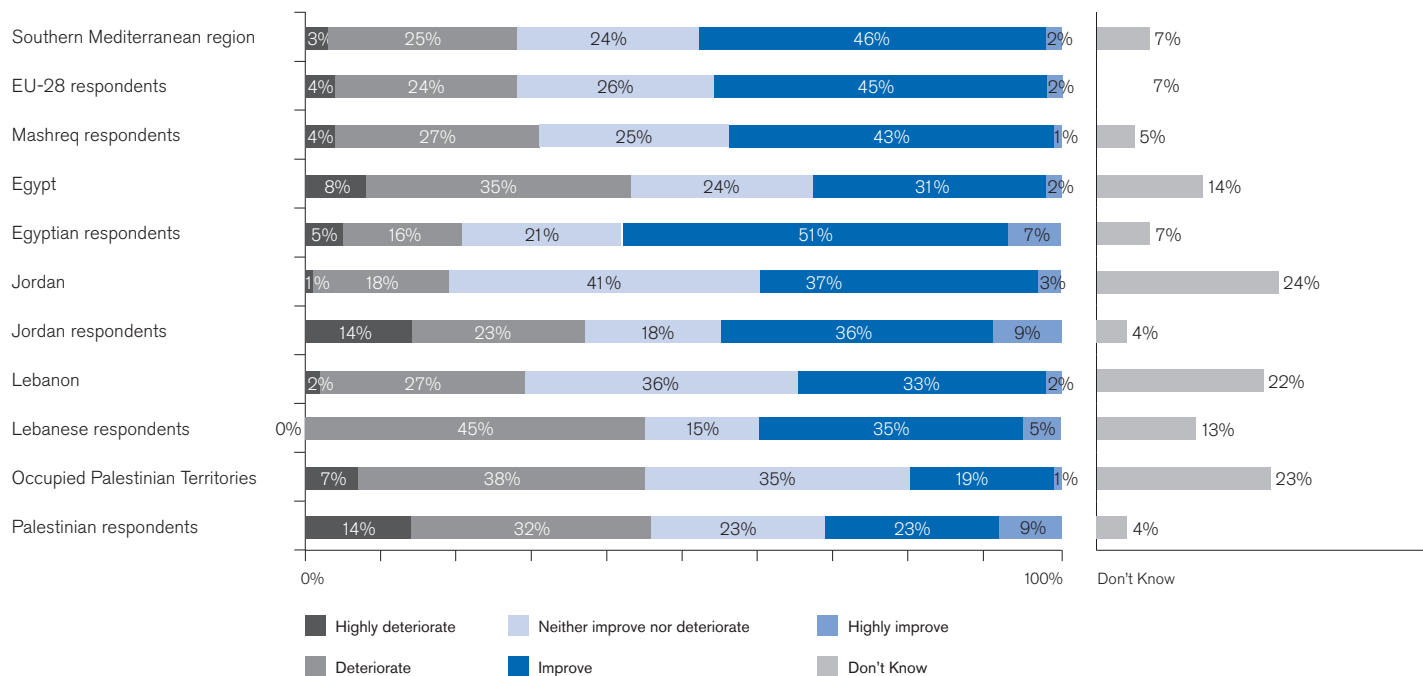
**Living standards of citizens**

Mashreq	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	27	194	188	356	17	782	56	838
	3%	25%	24%	46%	2%	100%	7%	
EU-28 respondents	16	94	101	177	8	396	32	428
	4%	24%	26%	45%	2%	100%	7%	
Mashreq respondents	5	38	35	60	2	140	8	148
	4%	27%	25%	43%	1%	100%	5%	
Egypt	54	255	176	223	12	720	118	838
	8%	35%	24%	31%	2%	100%	14%	
Egyptian respondents	2	7	9	22	3	43	3	46
	5%	16%	21%	51%	7%	100%	7%	
Jordan	7	118	263	235	17	640	198	838
	1%	18%	41%	37%	3%	100%	24%	
Jordan respondents	3	5	4	8	2	22	1	23
	14%	23%	18%	36%	9%	100%	4%	
Lebanon	15	175	233	216	15	654	184	838
	2%	27%	36%	33%	2%	100%	22%	
Lebanese respondents	0	9	3	7	1	20	3	23
	0%	45%	15%	35%	5%	100%	13%	
Occupied Palestinian Territories	47	244	229	121	6	647	191	838
	7%	38%	35%	19%	1%	100%	23%	
Palestinian respondents	3	7	5	5	2	22	1	23
	14%	32%	23%	23%	9%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: LIVING STANDARDS OF CITIZENS**



**B5. In the long term, how much will the following elements improve or deteriorate?**

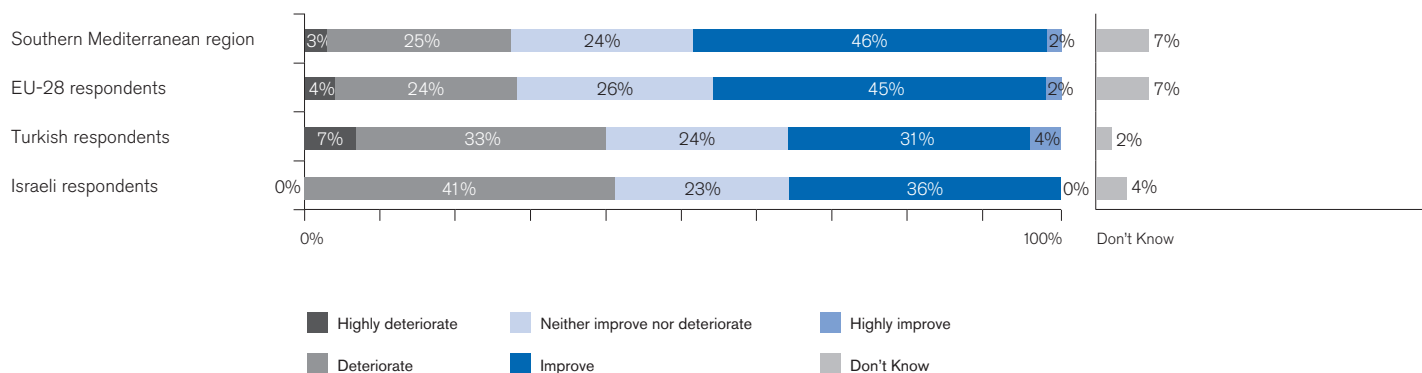
**Living standards of citizens**

Turkey and Israel	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	27 3%	194 25%	188 24%	356 46%	17 2%	782 100%	56 7%	838
EU-28 respondents	16 4%	94 24%	101 26%	177 45%	8 2%	396 100%	32 7%	428
Turkish respondents	3 7%	15 33%	11 24%	14 31%	2 4%	45 100%	1 2%	46
Israeli respondents	0 0%	9 41%	5 23%	8 36%	0 0%	22 100%	1 4%	23

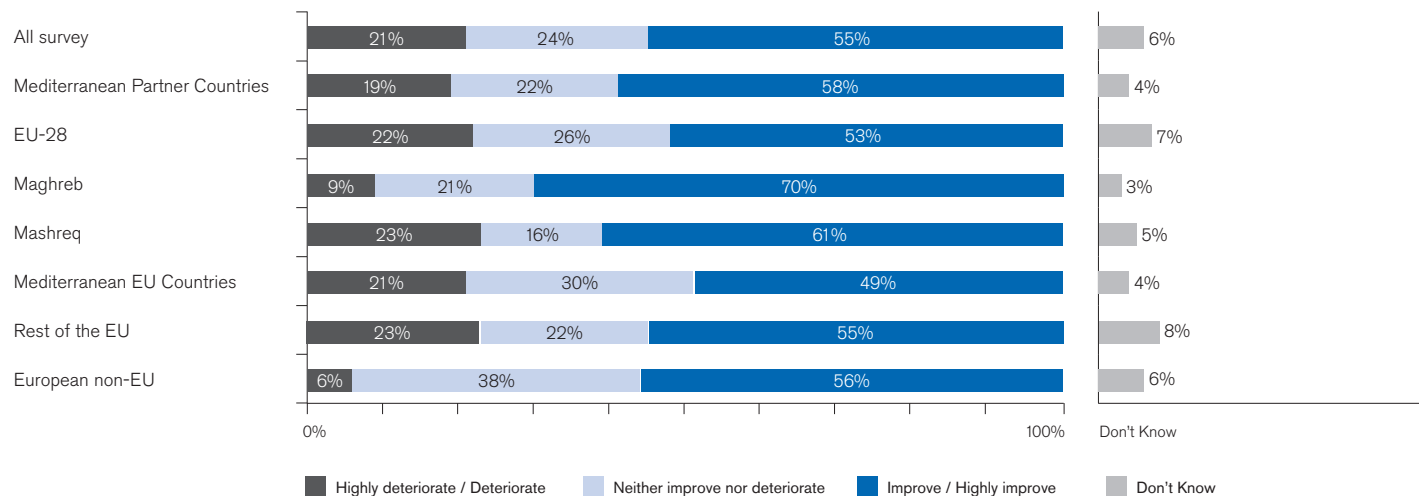
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: LIVING STANDARDS OF CITIZENS**



**Assessing the improvement or deterioration in the long term of the status of women; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Status of women**

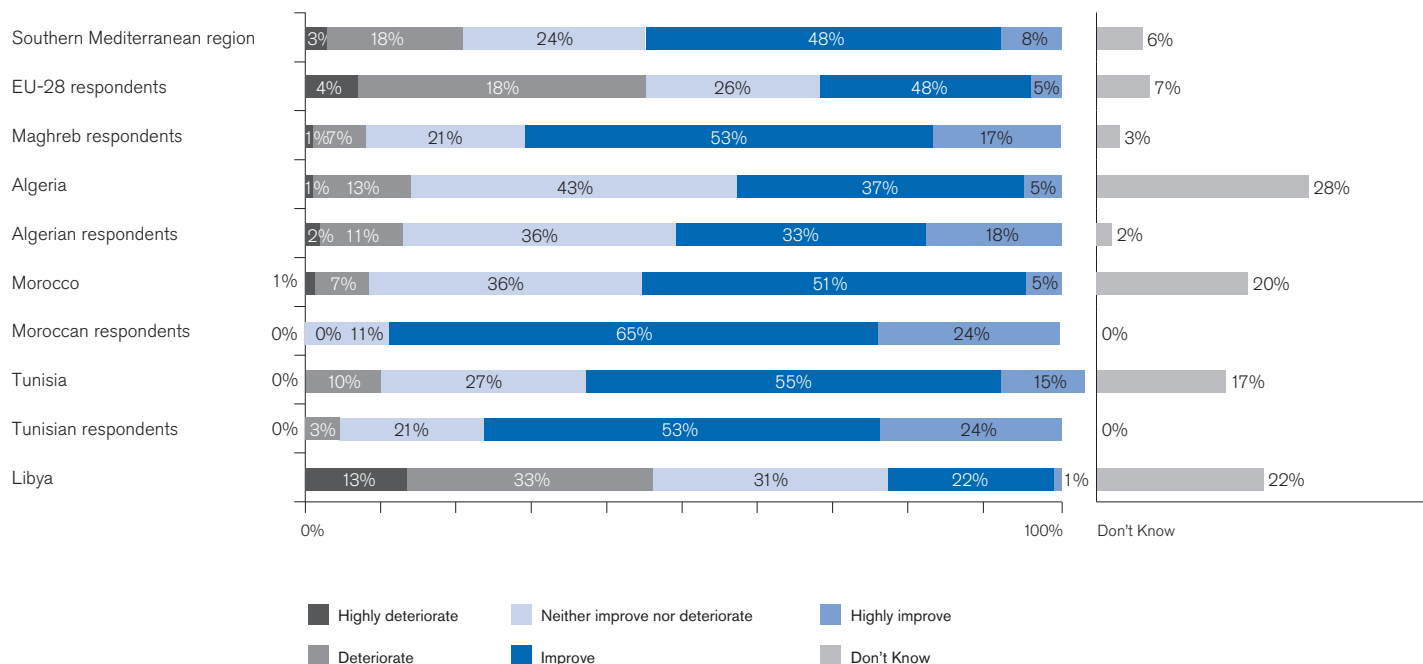
Maghreb	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	26	142	186	375	60	789	49	838
	3%	18%	24%	48%	8%	100%	6%	
EU-28 respondents	15	72	102	191	19	399	29	428
	4%	18%	26%	48%	5%	100%	7%	
Maghreb respondents	2	10	29	73	24	138	5	143
	1%	7%	21%	53%	17%	100%	3%	
Algeria	8	79	259	224	30	600	238	838
	1%	13%	43%	37%	5%	100%	28%	
Algerian respondents	1	5	16	15	8	45	1	46
	2%	11%	36%	33%	18%	100%	2%	
Morocco	4	45	240	338	42	669	169	838
	1%	7%	36%	51%	6%	100%	20%	
Moroccan respondents	0	0	5	30	11	46	0	46
	0%	0%	11%	65%	24%	100%	0%	
Tunisia	4	62	175	357	95	693	145	838
	1%	10%	27%	55%	15%	106%	17%	
Tunisian respondents	0	1	7	18	8	34	0	34
	0%	3%	21%	53%	24%	100%	0%	
Libya	87	216	199	140	9	651	187	838
	13%	33%	31%	22%	1%	100%	22%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

1 the low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the long term of the: STATUS OF WOMEN**



**B5. In the long term, how much will the following elements improve or deteriorate?**

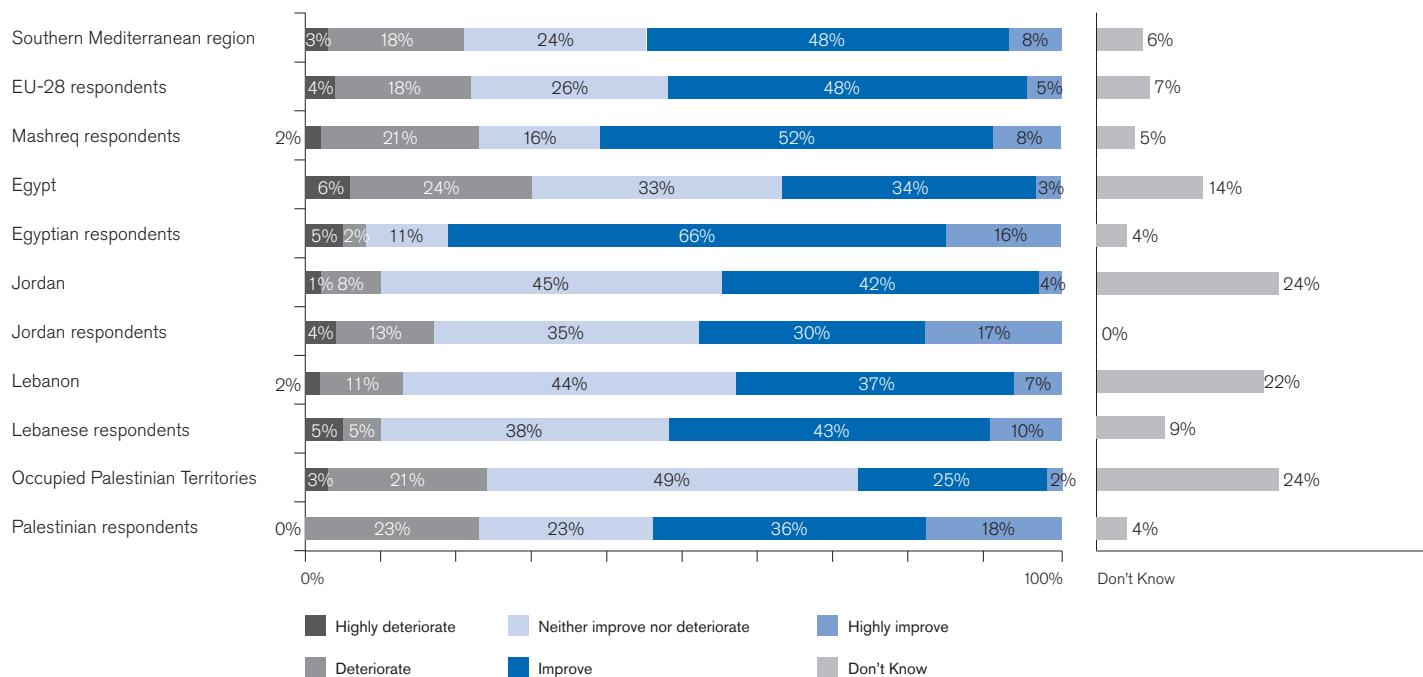
**Status of women**

Mashreq						Total*	Dkn	Total**
	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve			
Southern Mediterranean region (all respondents)	26	142	186	375	60	789	49	838
	3%	18%	24%	48%	8%	100%	6%	
EU-28 respondents	15	72	102	191	19	399	29	428
	4%	18%	26%	48%	5%	100%	7%	
Mashreq respondents	3	30	22	73	13	141	7	148
	2%	21%	16%	52%	9%	100%	5%	
Egypt	46	169	236	246	21	718	120	838
	6%	24%	33%	34%	3%	100%	14%	
Egyptian respondents	2	1	5	29	7	44	2	46
	5%	2%	11%	66%	16%	100%	4%	
Jordan	4	54	284	268	28	638	200	838
	1%	8%	45%	42%	4%	100%	24%	
Jordan respondents	1	3	8	7	4	23	0	23
	4%	13%	35%	30%	17%	100%	0%	
Lebanon	10	71	286	245	43	655	183	838
	2%	11%	44%	37%	7%	100%	22%	
Lebanese respondents	1	1	8	9	2	21	2	23
	5%	5%	38%	43%	10%	100%	9%	
Occupied Palestinian Territories	21	133	310	162	13	639	199	838
	3%	21%	49%	25%	2%	100%	24%	
Palestinian respondents	0	5	5	8	4	22	1	23
	0%	23%	23%	36%	18%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: STATUS OF WOMEN**



**B5. In the long term, how much will the following elements improve or deteriorate?**

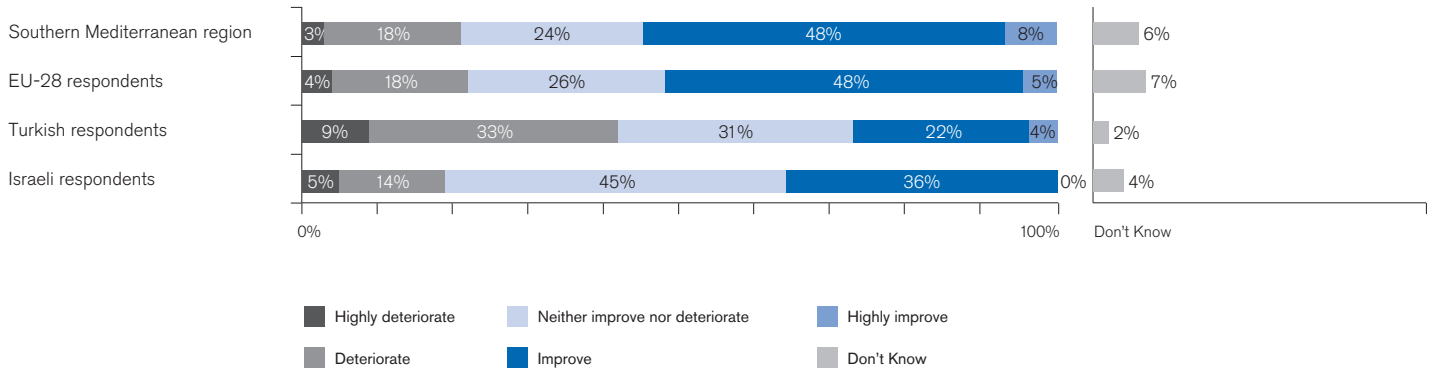
**Status of women**

Turkey and Israel	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	26	142	186	375	60	789	49	838
	3%	18%	24%	48%	8%	100%	6%	
EU-28 respondents	15	72	102	191	19	399	29	428
	4%	18%	26%	48%	5%	100%	7%	
Turkish respondents	4	15	14	10	2	45	1	46
	9%	33%	31%	22%	4%	100%	2%	
Israeli respondents	1	3	10	8	0	22	1	23
	5%	14%	45%	36%	0%	100%	4%	

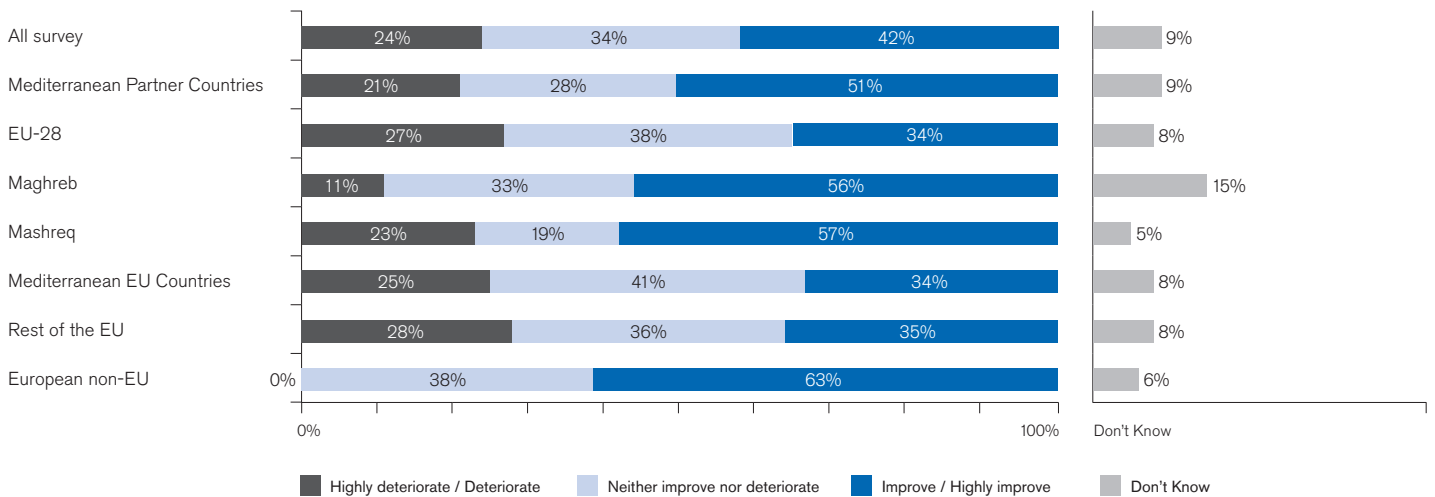
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: STATUS OF WOMEN**



**Assessing the improvement or deterioration in the long term of the recognition of minorities; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Recognition of minorities**

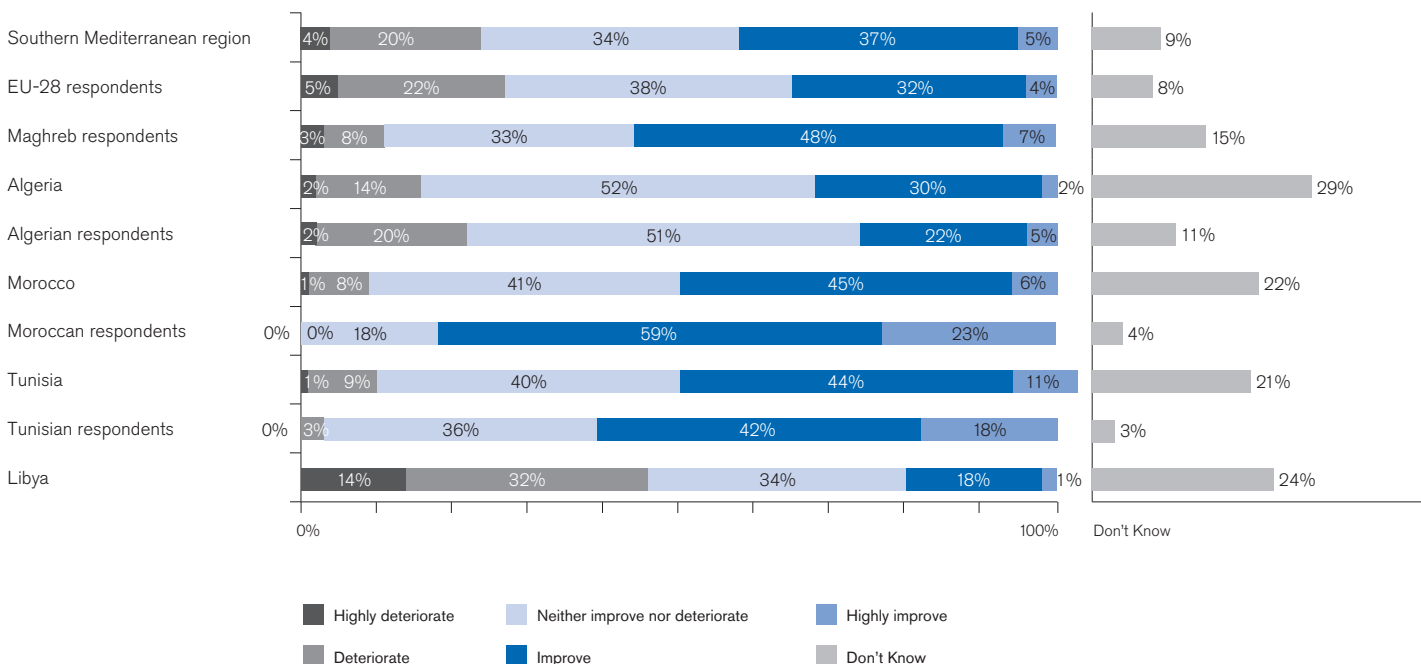
Maghreb	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	33	152	258	285	35	763	75	838
	4%	20%	34%	37%	5%	100%	9%	
EU-28 respondents	20	87	150	126	9	392	36	428
	5%	22%	38%	32%	2%	100%	8%	
Maghreb respondents	4	10	40	59	9	122	21	143
	3%	8%	33%	48%	7%	100%	15%	
Algeria	13	84	308	176	10	591	247	838
	2%	14%	52%	30%	2%	100%	29%	
Algerian respondents	1	8	21	9	2	41	5	46
	2%	20%	51%	22%	5%	100%	11%	
Morocco	6	50	266	290	38	650	188	838
	1%	8%	41%	45%	6%	100%	22%	
Moroccan respondents	0	0	8	26	10	44	2	46
	0%	0%	18%	59%	23%	100%	4%	
Tunisia	4	59	253	277	69	662	176	838
	1%	9%	40%	44%	11%	104%	21%	
Tunisian respondents	0	1	12	14	6	33	1	34
	0%	3%	36%	42%	18%	100%	3%	
Libya	88	206	217	117	7	635	203	838
	14%	32%	34%	18%	1%	100%	24%	

(\* ) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Libya doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the long term of the: RECOGNITION OF MINORITIES**



**B5. In the long term, how much will the following elements improve or deteriorate?**

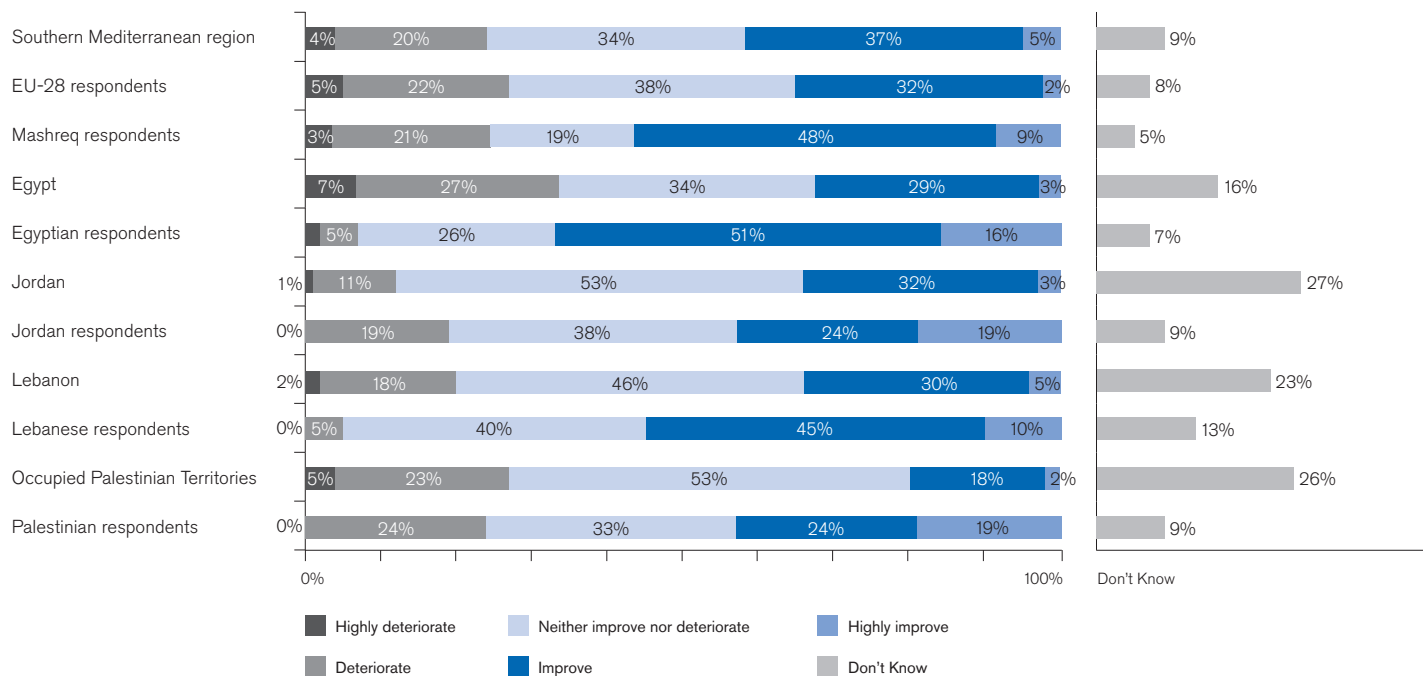
**Recognition of minorities**

Mashreq	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	33	152	258	285	35	<b>763</b>	75	838
	4%	20%	34%	37%	5%	<b>100%</b>	9%	
EU-28 respondents	20	87	150	126	9	<b>392</b>	36	428
	5%	22%	38%	32%	2%	<b>100%</b>	8%	
Mashreq respondents	4	29	27	68	13	<b>141</b>	7	148
	3%	21%	19%	48%	9%	<b>100%</b>	5%	
Egypt	51	191	240	203	20	<b>705</b>	133	838
	7%	27%	34%	29%	3%	<b>100%</b>	16%	
Egyptian respondents	1	2	11	22	7	<b>43</b>	3	46
	2%	5%	26%	51%	16%	<b>100%</b>	7%	
Jordan	5	67	326	196	21	<b>615</b>	223	838
	1%	11%	53%	32%	3%	<b>100%</b>	27%	
Jordan respondents	0	4	8	5	4	<b>21</b>	2	23
	0%	19%	38%	24%	19%	<b>100%</b>	9%	
Lebanon	15	114	293	191	30	<b>643</b>	195	838
	2%	18%	46%	30%	5%	<b>100%</b>	23%	
Lebanese respondents	0	1	8	9	2	<b>20</b>	3	23
	0%	5%	40%	45%	10%	<b>100%</b>	13%	
Occupied Palestinian Territories	28	141	328	112	12	<b>621</b>	217	838
	5%	23%	53%	18%	2%	<b>100%</b>	26%	
Palestinian respondents	0	5	7	5	4	<b>21</b>	2	23
	0%	24%	33%	24%	19%	<b>100%</b>	9%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: RECOGNITION OF MINORITIES**



**B5. In the long term, how much will the following elements improve or deteriorate?**

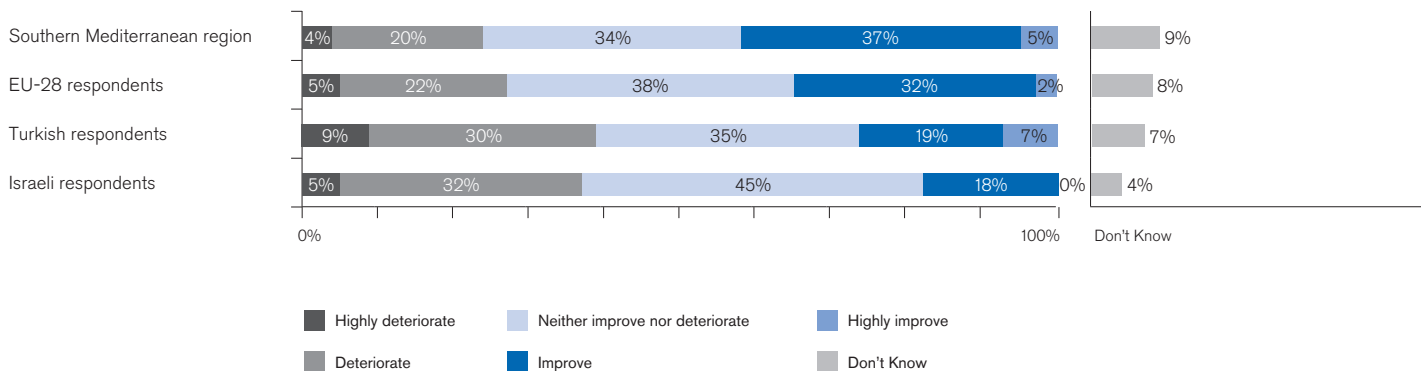
**Recognition of minorities**

Turkey and Israel	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	33	152	258	285	35	763	75	838
	4%	20%	34%	37%	5%	100%	9%	
EU-28 respondents	20	87	150	126	9	392	36	428
	5%	22%	38%	32%	2%	100%	8%	
Turkish respondents	4	13	15	8	3	43	3	46
	9%	30%	35%	19%	7%	100%	7%	
Israeli respondents	1	7	10	4	0	22	1	23
	5%	32%	45%	18%	0%	100%	4%	

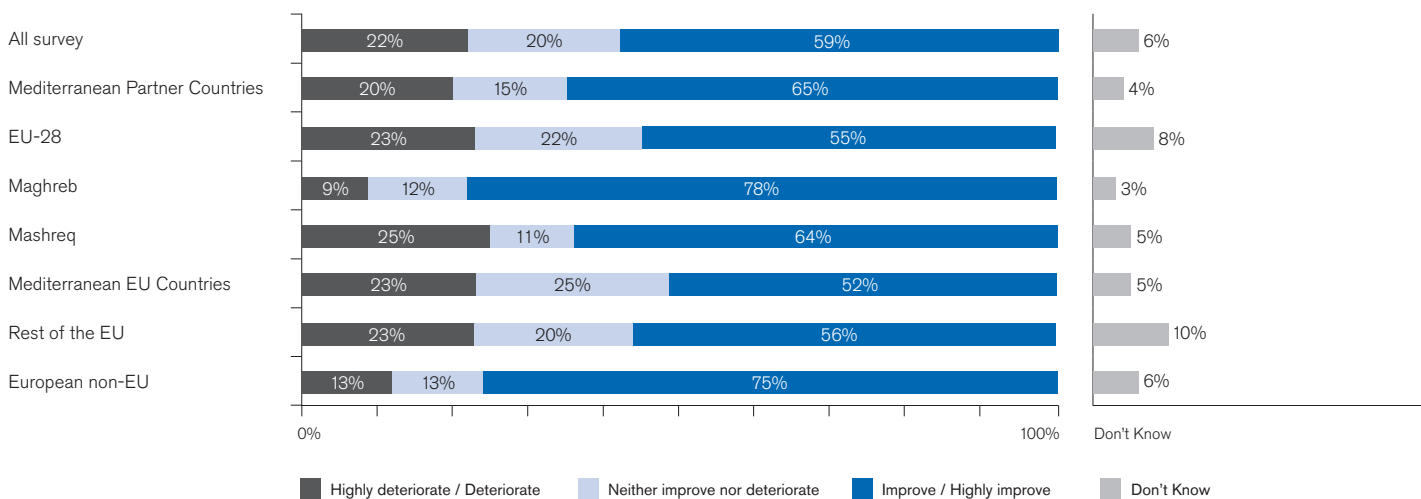
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: RECOGNITION OF MINORITIES**



**Assessing the improvement or deterioration in the long term of the economic perspective of the region; respondents from:**



**B5. In the long term, how much will the following elements improve or deteriorate?**

**Economic prospective of the region**

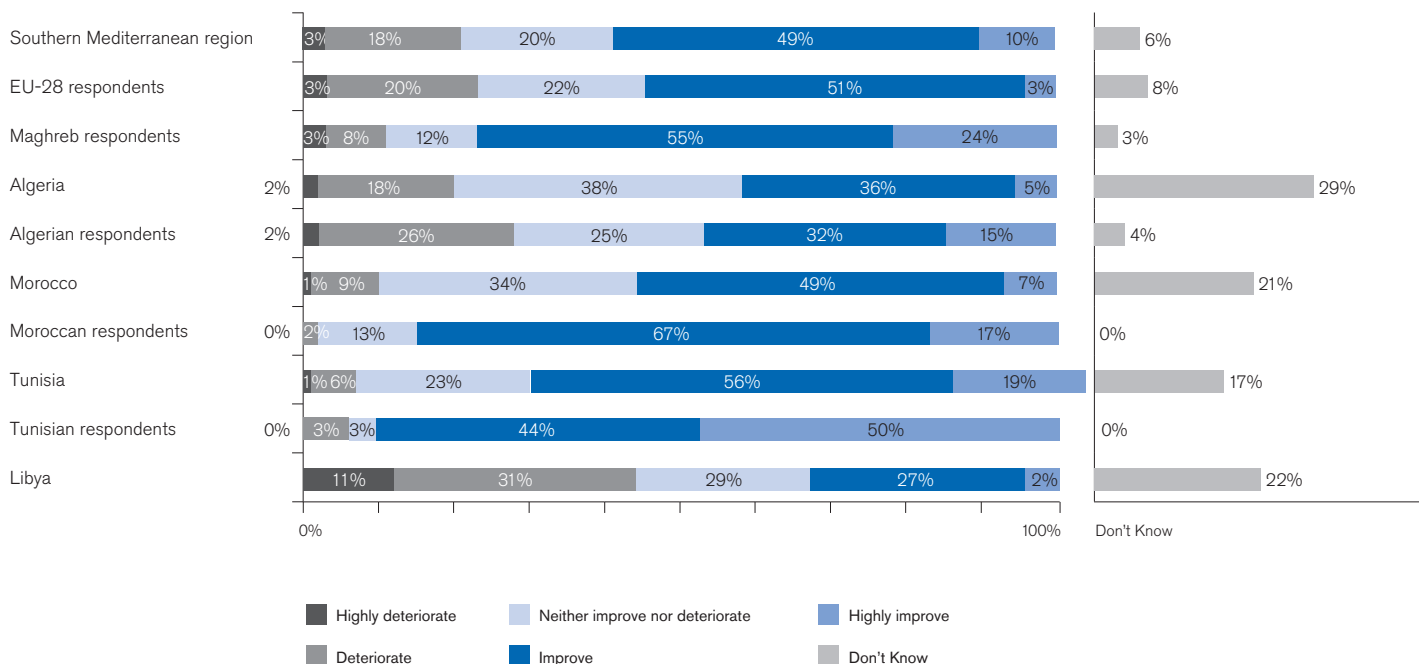
Maghreb	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	27	143	153	383	78	784	54	838
	3%	18%	20%	49%	10%	100%	6%	
EU-28 respondents	12	79	88	201	14	394	34	428
	3%	20%	22%	51%	4%	100%	8%	
Maghreb respondents	4	9	17	76	33	139	4	143
	3%	6%	12%	55%	24%	100%	3%	
Algeria	14	108	229	218	29	598	240	838
	2%	18%	38%	36%	5%	100%	29%	
Algerian respondents	1	11	11	14	7	44	2	46
	2%	25%	25%	32%	16%	100%	4%	
Morocco	5	62	224	321	49	661	177	838
	1%	9%	34%	49%	7%	100%	21%	
Moroccan respondents	0	1	6	31	8	46	0	46
	0%	2%	13%	67%	17%	100%	0%	
Tunisia	6	42	153	368	127	696	142	838
	1%	6%	23%	56%	19%	107%	17%	
Tunisian respondents	0	1	1	15	17	34	0	34
	0%	3%	3%	44%	50%	100%	0%	
Libya	70	202	192	174	14	652	186	838
	11%	31%	29%	27%	2%	100%	22%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

The low number of respondents from Lybia doesn't allow for a significant analysis of Libyan respondents

**Assessing the improvement or deterioration in the long term of the: ECONOMIC PROSPECTIVE OF THE REGION**



**B5. In the long term, how much will the following elements improve or deteriorate?**

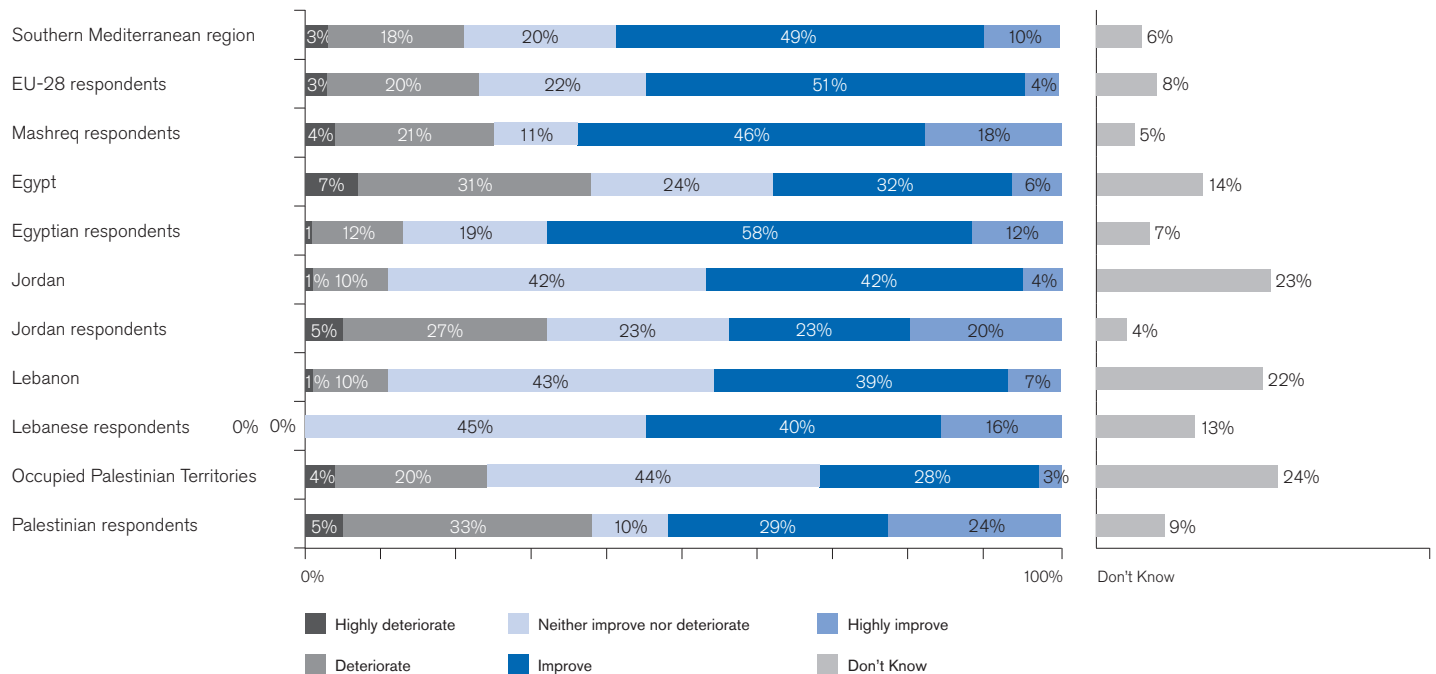
**Economic prospective of the region**

Mashreq	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	27	143	153	383	78	<b>784</b>	54	838
	3%	18%	20%	49%	10%	<b>100%</b>	6%	
EU-28 respondents	12	79	88	201	14	<b>394</b>	34	428
	3%	20%	22%	51%	4%	<b>100%</b>	8%	
Mashreq respondents	5	30	16	65	25	<b>141</b>	7	148
	4%	21%	11%	46%	18%	<b>100%</b>	5%	
Egypt	53	226	172	234	36	<b>721</b>	117	838
	7%	31%	24%	32%	5%	<b>100%</b>	14%	
Egyptian respondents	0	5	8	25	5	<b>43</b>	3	46
	0%	12%	19%	58%	12%	<b>100%</b>	7%	
Jordan	7	66	271	271	28	<b>643</b>	195	838
	1%	10%	42%	42%	4%	<b>100%</b>	23%	
Jordan respondents	1	6	5	5	5	<b>22</b>	1	23
	5%	27%	23%	23%	23%	<b>100%</b>	4%	
Lebanon	9	68	279	256	43	<b>655</b>	183	838
	1%	10%	43%	39%	7%	<b>100%</b>	22%	
Lebanese respondents	0	0	9	8	3	<b>20</b>	3	23
	0%	0%	45%	40%	15%	<b>100%</b>	13%	
Occupied Palestinian Territories	26	130	278	180	21	<b>635</b>	203	838
	4%	20%	44%	28%	3%	<b>100%</b>	24%	
Palestinian respondents	1	7	2	6	5	<b>21</b>	2	23
	5%	33%	10%	29%	24%	<b>100%</b>	9%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: ECONOMIC PROSPECTIVE OF THE REGION**



**B5. In the long term, how much will the following elements improve or deteriorate?**

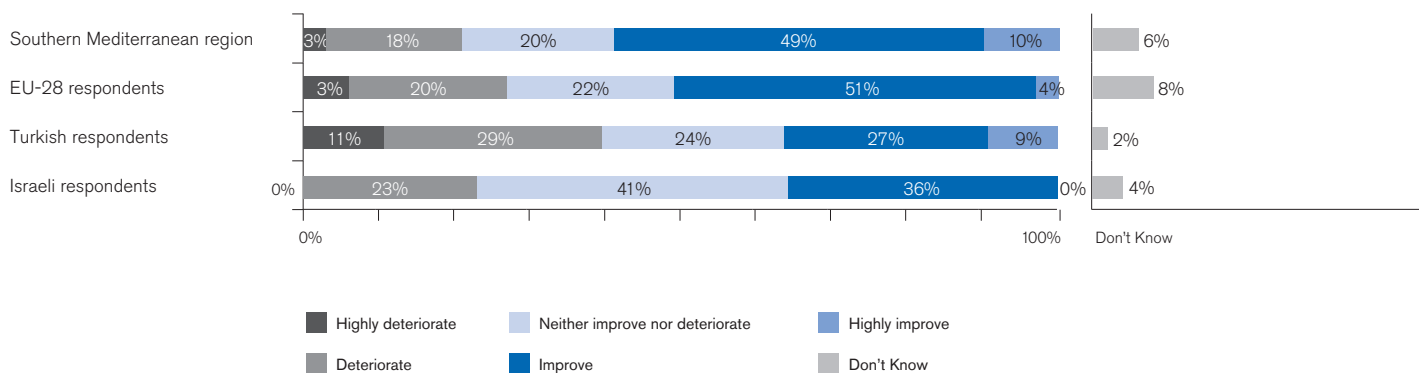
**Economic prospective of the region**

Turkey and Israel	Highly deteriorate	Deteriorate	Neither improve nor deteriorate	Improve	Highly improve	Total*	Dkn	Total**
Southern Mediterranean region (all respondents)	27	143	153	383	78	784	54	838
	3%	18%	20%	49%	10%	100%	6%	
EU-28 respondents	12	79	88	201	14	394	34	428
	3%	20%	22%	51%	4%	100%	8%	
Turkish respondents	5	13	11	12	4	45	1	46
	11%	29%	24%	27%	9%	100%	2%	
Israeli respondents	0	5	9	8	0	22	1	23
	0%	23%	41%	36%	0%	100%	4%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the improvement or deterioration in the long term of the: ECONOMIC PROSPECTIVE OF THE REGION**



# BLOCK C

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POSITION OF THE EU  
IN THE SOUTHERN  
MEDITERRANEAN REGION

### Position of the EU in the Southern Mediterranean Region

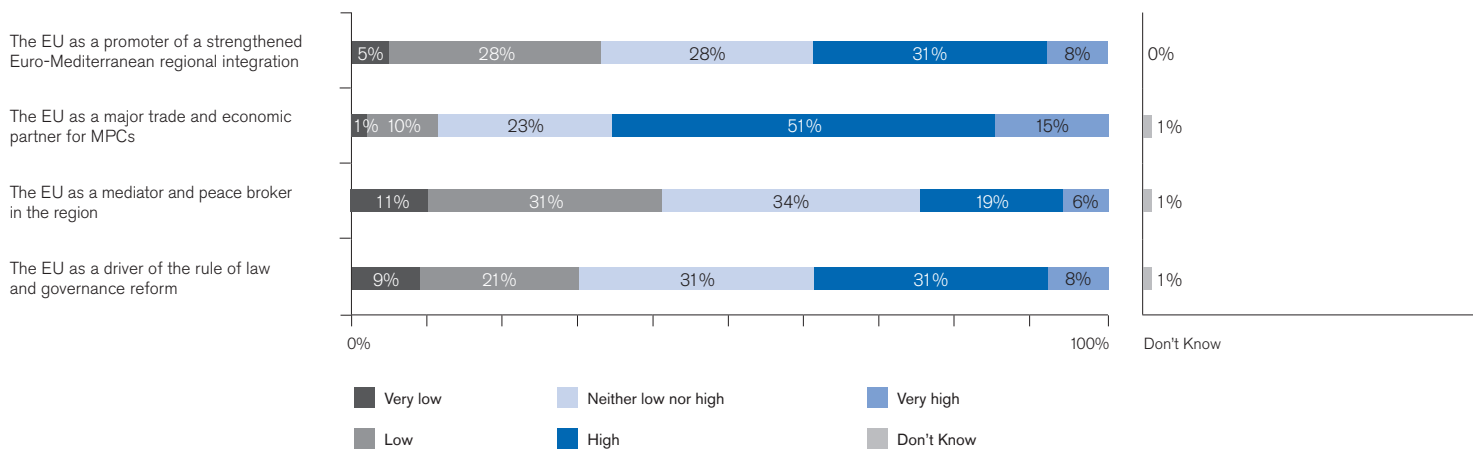
C1. In the framework of a multipolar scenario, what will be the EU's influence regarding the following aspects:

	Very low	Low	Neither low nor high	High	Very high	Total*	Dkn	Total**
The EU as a promoter of a strengthened Euro-Mediterranean regional integration	43	235	237	255	64	<b>834</b>	4	838
	5%	28%	28%	31%	8%	<b>100%</b>	0%	
The EU as a major trade and economic partner for MPCs	9	80	189	424	128	<b>830</b>	8	838
	1%	10%	23%	51%	15%	<b>100%</b>	1%	
The EU as a mediator and peace broker in the region	92	255	281	155	50	<b>833</b>	5	838
	11%	31%	34%	19%	6%	<b>100%</b>	1%	
The EU as a driver of the rule of law and governance reform	71	178	261	259	64	<b>833</b>	5	838
	9%	21%	31%	31%	8%	<b>100%</b>	1%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

#### Influence of the European Union in the present framework of a multipolar scenario



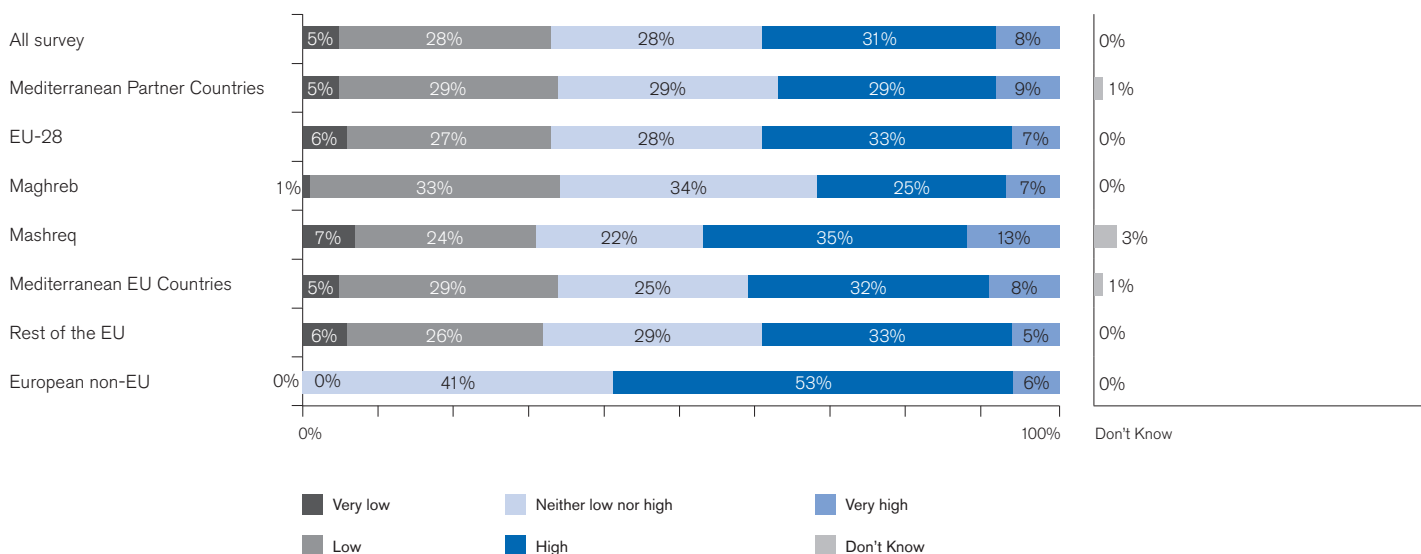
**C1. In the framework of a multipolar scenario, what will be the EU's influence regarding the following aspects:**

The EU as a promoter of a strengthened Euro-Mediterranean regional integration	Very low	Low	Neither low nor high	High	Very high	Total*	Dkn	Total**
	All survey	43 5%	235 28%	237 28%	255 31%	64 8%	834 100%	4 0%
Mediterranean Partner Countries	18 5%	107 29%	107 29%	109 29%	33 9%	374 100%	2 1%	376
EU-28	25 6%	117 27%	118 28%	139 33%	28 7%	427 100%	1 0%	428
Maghreb	2 1%	47 33%	48 34%	36 25%	10 7%	143 100%	0 0%	143
Mashreq	10 7%	34 24%	31 22%	50 35%	19 13%	144 100%	4 3%	148
Mediterranean EU Countries	9 5%	50 29%	42 25%	55 32%	14 8%	170 100%	1 1%	171
Rest of EU	15 6%	68 26%	75 29%	85 33%	14 5%	257 100%	0 0%	257
European non-EU	0 0%	0 0%	7 41%	9 53%	1 6%	17 100%	0 0%	17

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**In the framework of a multipolar scenario, EU's influence regarding its rol as PROMOTER OF A STRENGTHENED EURO-MEDITERRANEAN REGIONAL INTEGRATION**



**C1. In the framework of a multipolar scenario, what will be the EU's influence regarding the following aspects:**

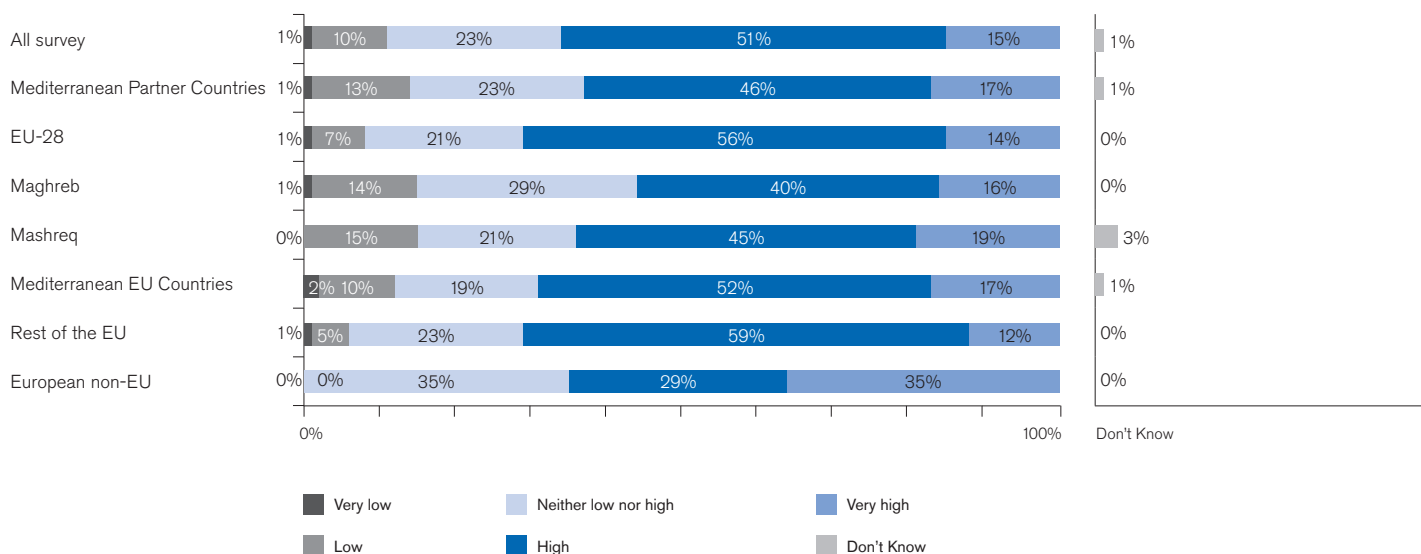
**The EU as a major trade and economic partner for MPCs**

	Very low	Low	Neither low nor high	High	Very high	Total*	Dkn	Total**
All survey	9	80	189	424	128	830	8	838
	1%	10%	23%	51%	15%	100%	1%	
Mediterranean Partner Countries	4	50	86	169	62	371	5	376
	1%	13%	23%	46%	17%	100%	1%	
EU-28	5	31	90	241	60	427	1	428
	1%	7%	21%	56%	14%	100%	0%	
Maghreb	1	20	42	57	23	143	0	143
	1%	14%	29%	40%	16%	100%	0%	
Mashreq	1	21	30	65	27	144	4	148
	1%	15%	21%	45%	19%	100%	3%	
Mediterranean EU Countries	3	17	32	89	29	170	1	171
	2%	10%	19%	52%	17%	100%	1%	
Rest of EU	2	14	58	152	31	257	0	257
	1%	5%	23%	59%	12%	100%	0%	
European non-EU	0	0	6	5	6	17	0	17
	0%	0%	35%	29%	35%	100%	0%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**In the framework of a multipolar scenario, EU's influence regarding its rol as THE MAJOR TRADE AND ECONOMIC PARTNER FOR MPCs**



**C1. In the framework of a multipolar scenario, what will be the EU's influence regarding the following aspects:**

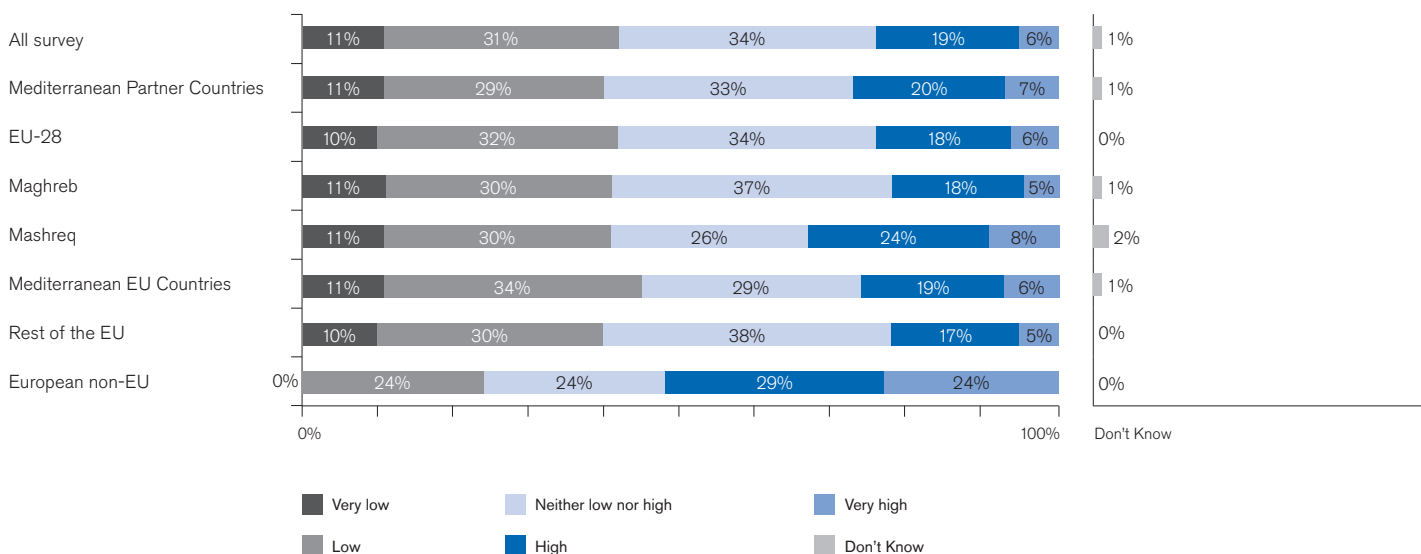
**The EU as a mediator and peace broker in the region**

	Very low	Low	Neither low nor high	High	Very high	Total*	Dkn	Total**
All survey	92	255	281	155	50	833	5	838
	11%	31%	34%	19%	6%	100%	1%	
Mediterranean Partner Countries	41	109	121	75	26	372	4	376
	11%	29%	33%	20%	7%	100%	1%	
EU-28	44	135	146	77	24	426	2	428
	10%	32%	34%	18%	6%	100%	0%	
Maghreb	16	42	52	25	7	142	1	143
	11%	30%	37%	18%	5%	100%	1%	
Mashreq	16	44	38	35	12	145	3	148
	11%	30%	26%	24%	8%	100%	2%	
Mediterranean EU Countries	18	58	50	33	11	170	1	171
	11%	34%	29%	19%	6%	100%	1%	
Rest of EU	26	77	96	44	13	256	1	257
	10%	30%	38%	17%	5%	100%	0%	
European non-EU	0	4	4	5	4	17	0	17
	0%	24%	24%	29%	24%	100%	0%	

(\* ) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\* ) Total number of respondents including "Don't know" answers

**In the framework of a multipolar scenario, the EU's influence regarding its rol as MEDIATOR AND PEACE BROKER IN THE REGION**



**C1. In the framework of a multipolar scenario, what will be the EU's influence regarding the following aspects:**

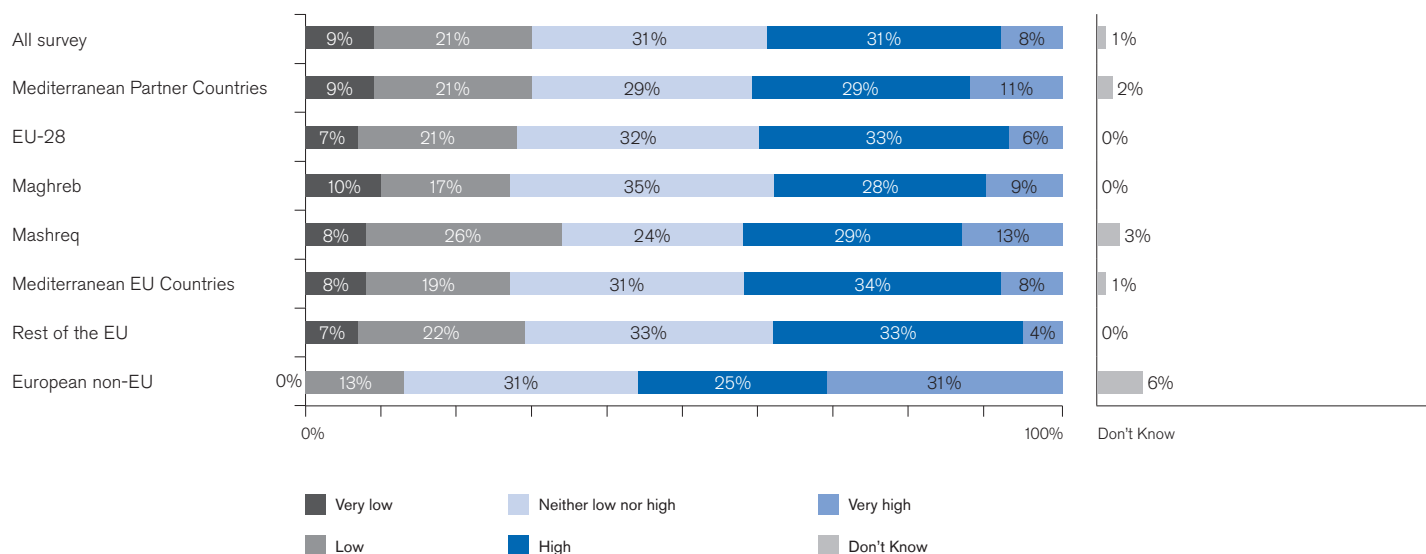
**The EU as a driver of the rule of law and governance reform**

	Very low	Low	Neither low nor high	High	Very high	Total*	Dkn	Total**
All survey	71	178	261	259	64	833	5	838
	9%	21%	31%	31%	8%	100%	1%	
Mediterranean Partner Countries	35	78	109	109	39	370	6	376
	9%	21%	29%	29%	11%	100%	2%	
EU-28	32	89	138	143	25	427	1	428
	7%	21%	32%	33%	6%	100%	0%	
Maghreb	15	25	50	40	13	143	0	143
	10%	17%	35%	28%	9%	100%	0%	
Mashreq	12	37	34	42	19	144	4	148
	8%	26%	24%	29%	13%	100%	3%	
Mediterranean EU Countries	14	33	52	57	14	170	1	171
	8%	19%	31%	34%	8%	100%	1%	
Rest of EU	18	57	86	85	11	257	0	257
	7%	22%	33%	33%	4%	100%	0%	
European non-EU	0	2	5	4	5	16	1	17
	0%	13%	31%	25%	31%	100%	6%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**In the framework of a multipolar scenario, EU's influence regarding its rol as DRIVER OF THE RULE OF LAW AND GOVERNANCE REFORM**



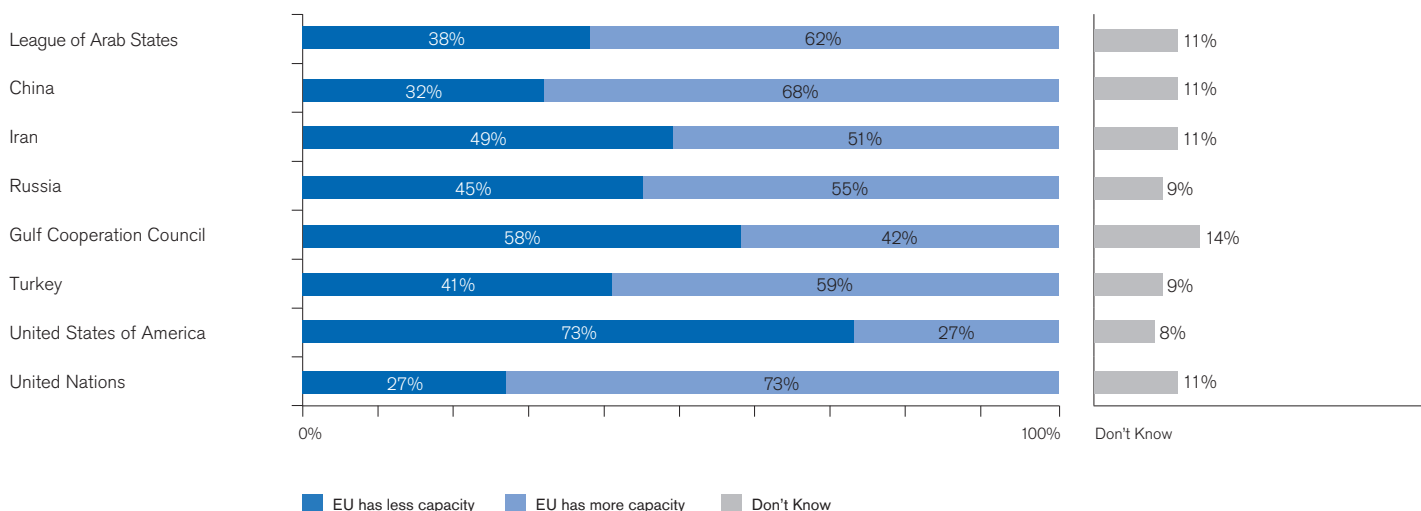
**C2. Please assess the EU's role in the Southern Mediterranean countries compared to other regional and international actors.**

	Less Impact	More Impact	Total*	Dkn	Total**
League of Arab States	285	464	749	89	838
	38%	62%	100%	11%	
China	242	507	749	89	838
	32%	68%	100%	11%	
Iran	370	379	749	89	838
	49%	51%	100%	11%	
Russia	345	418	763	75	838
	45%	55%	100%	9%	
Gulf Cooperation Council	418	304	722	116	838
	58%	42%	100%	14%	
Turkey	316	446	762	76	838
	41%	59%	100%	9%	
United States of America	559	212	771	67	838
	73%	27%	100%	8%	
United Nations	199	548	747	91	838
	27%	73%	100%	11%	

(\* ) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the EU's future role in MPCs compared to other regional and international actors** (the graph below shows the EU's relative capacity to influence regional developments compared to other actors)



**C2. Please assess the EU's role in the Southern Mediterranean countries compared to other regional and international actors.**

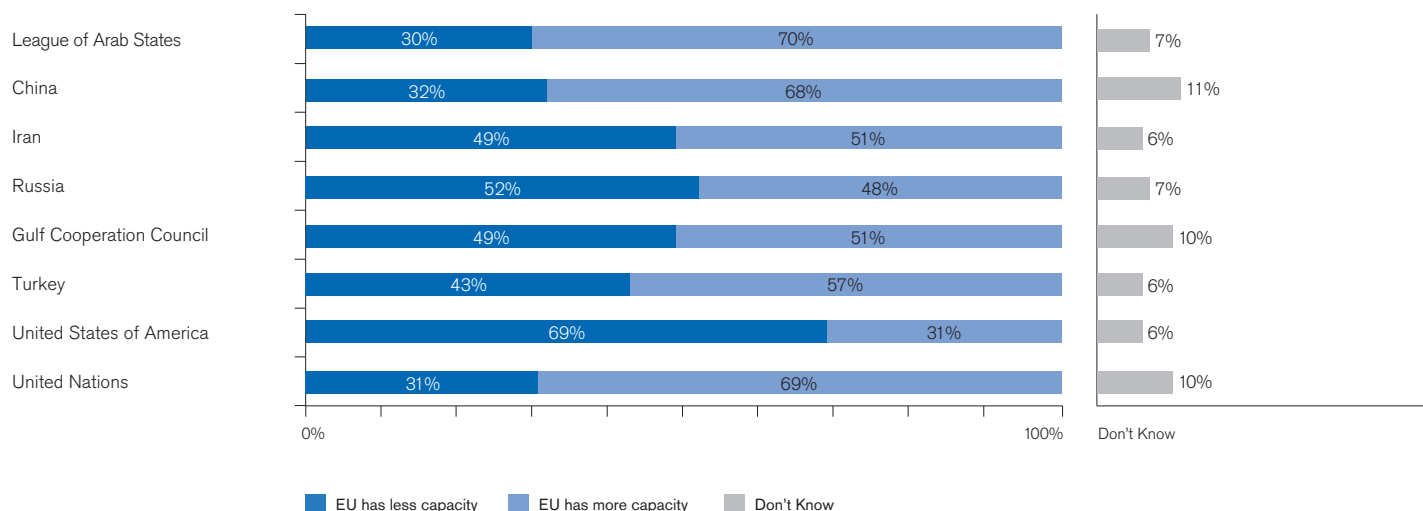
**MPC answers**

	Less Impact	More Impact	Total*	Dkn	Total**
League of Arab States	104	247	351	25	376
	30%	70%	100%	7%	
China	106	230	336	40	376
	32%	68%	100%	11%	
Iran	173	179	352	24	376
	49%	51%	100%	6%	
Russia	182	166	348	28	376
	52%	48%	100%	7%	
Gulf Cooperation Council	167	172	339	37	376
	49%	51%	100%	10%	
Turkey	152	200	352	24	376
	43%	57%	100%	6%	
United States of America	243	109	352	24	376
	69%	31%	100%	6%	
United Nations	105	233	338	38	376
	31%	69%	100%	10%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the EU's future role in MPCs compared to other regional and international actors** (the graph below shows the EU's relative capacity to influence regional developments compared to other actors)



**C2. Please assess the EU's role in the Southern Mediterranean countries compared to other regional and international actors.**

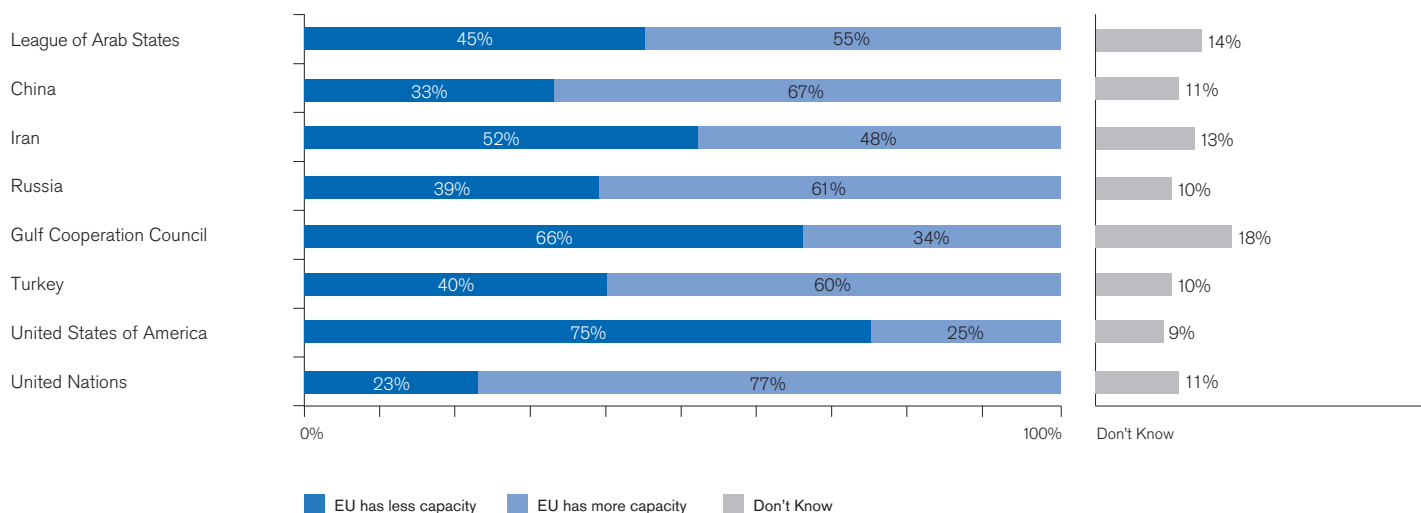
**EU-28 answers**

	Less Impact	More Impact	Total*	Dkn	Total**
League of Arab States	167	203	370	58	428
	45%	55%	100%	14%	
China	126	256	382	46	428
	33%	67%	100%	11%	
Iran	194	179	373	55	428
	52%	48%	100%	13%	
Russia	149	235	384	44	428
	39%	61%	100%	10%	
Gulf Cooperation Council	233	119	352	76	428
	66%	34%	100%	18%	
Turkey	153	233	386	42	428
	40%	60%	100%	10%	
United States of America	292	96	388	40	428
	75%	25%	100%	9%	
United Nations	88	291	379	49	428
	23%	77%	100%	11%	

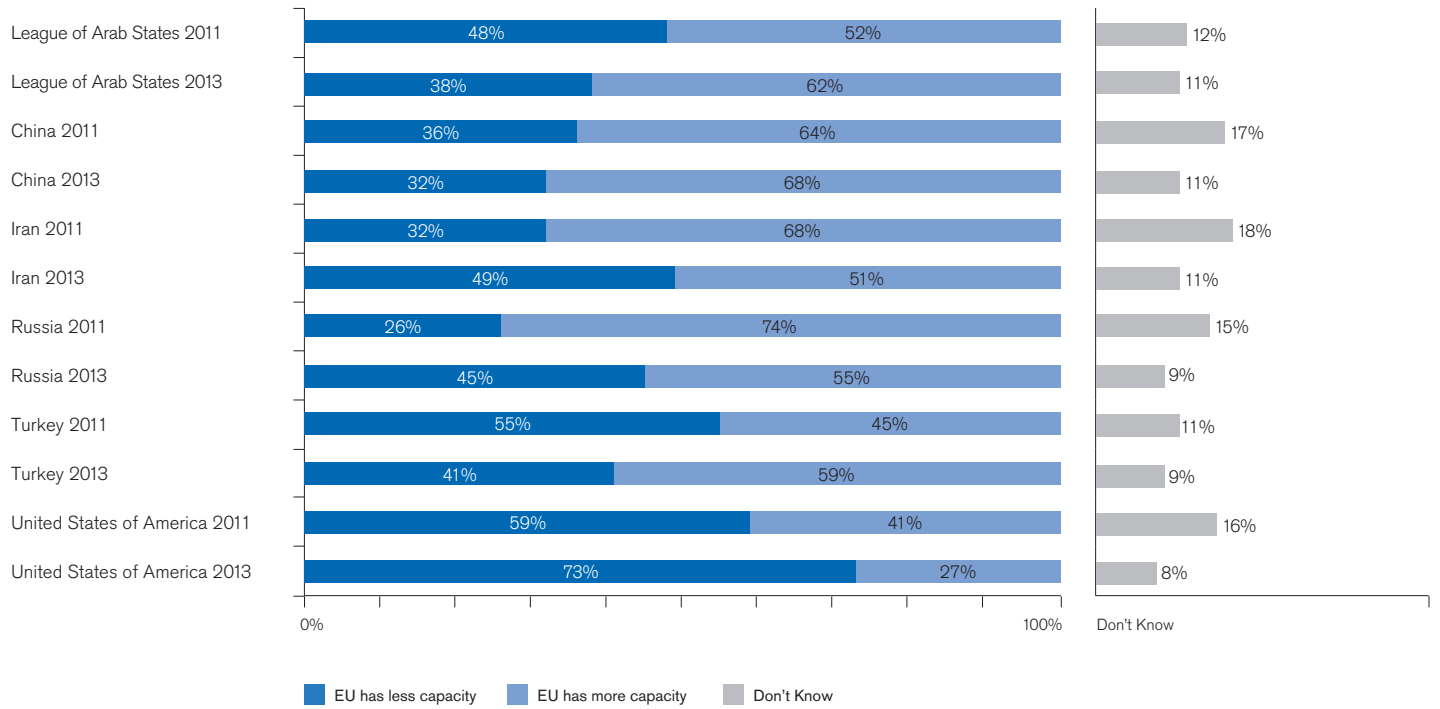
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the EU's future role in MPCs compared to other regional and international actors** (the graph below shows the EU's relative capacity to influence regional developments compared to other actors)



**Assessing the EU's future role in MPCs compared to other regional and international actors** (the graph below shows the EU's relative capacity to influence regional developments compared to other actors)



# BLOCK D

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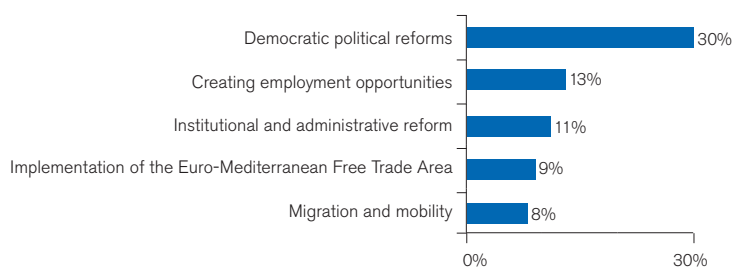
AN ASSESSMENT OF  
EURO-MEDITERRANEAN POLICIES

## An Assessment of Euro-Mediterranean Policies

D.1 Please select and arrange five of the following areas according to what you believe should be the priorities of the EU's policies in the near future.

TOTAL SURVEY	1st	2nd	3rd	4th	5th
Democratic political reforms	254	83	60	51	87
	30%	10%	7%	6%	10%
Institutional and administrative reform	95	126	84	79	78
	11%	15%	10%	9%	9%
Transitional justice	43	46	52	50	41
	5%	5%	6%	6%	5%
Security sector reform	29	56	45	53	38
	3%	7%	5%	6%	5%
Implementation of the Euro-Mediterranean Free Trade Area	74	55	60	66	64
	9%	7%	7%	8%	8%
Economic governance	54	105	112	79	82
	6%	13%	13%	9%	10%
Creating employment opportunities	110	143	116	118	67
	13%	17%	14%	14%	8%
Partnership with civil society	46	58	89	105	86
	5%	7%	11%	13%	10%
Women's empowerment	35	51	72	78	80
	4%	6%	9%	9%	10%
Migration and mobility	72	61	68	77	98
	9%	7%	8%	9%	12%
Development of youth policies	20	52	78	79	108
	2%	6%	9%	9%	13%
Other	6	2	2	3	9
	1%	0%	0%	0%	1%
<b>TOTAL SURVEY</b>	<b>838</b>	<b>838</b>	<b>838</b>	<b>838</b>	<b>838</b>

EU's policies in the near future for the region: selecting policy areas according to priority (5 areas considered to be 1st priority)



**D1. Please select and arrange five of the following areas according to what you believe should be the priorities of the EU's policies in the near future.**

TOTAL SURVEY	1st	2nd	3rd	4th	5th	Rest	Total
Democratic political reforms	254	83	60	51	87	303	838
	30%	10%	7%	6%	10%	36%	100%

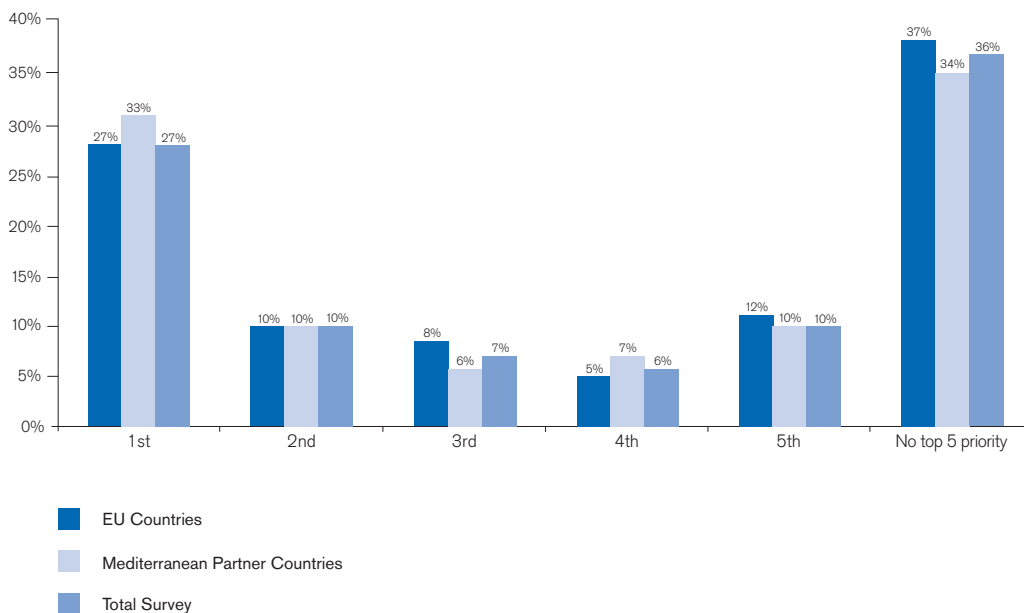
Respondents from Mediterranean Partner Countries	1st	2nd	3rd	4th	5th	Rest	Total
Democratic political reforms	124	39	22	28	36	127	376
	33%	10%	6%	7%	10%	34%	100%

Respondents from European Union Countries	1st	2nd	3rd	4th	5th	Rest	Total
Democratic political reforms	117	44	34	23	51	159	428
	27%	10%	8%	5%	12%	37%	100%

**EU's policies in the near future for the region: selecting policy areas according to priority**

Priority for democratic political reforms



**D1. Please select and arrange five of the following areas according to what you believe should be the priorities of the EU's policies in the near future.**

TOTAL SURVEY	1st	2nd	3rd	4th	5th	Rest	Total
Creating employment opportunities	110	143	116	118	67	284	838
	13%	17%	14%	14%	8%	34%	100%

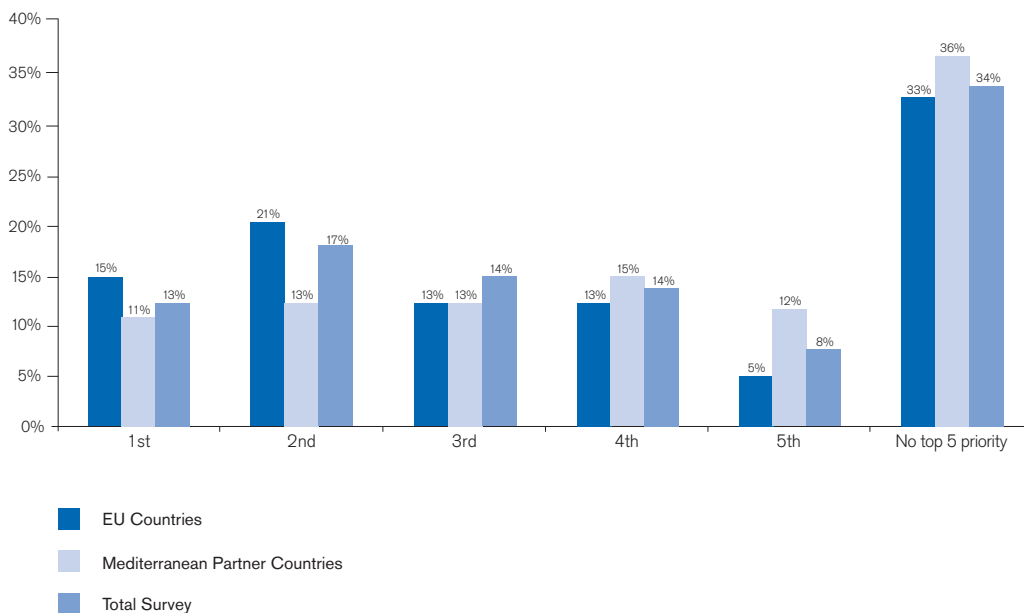
Respondents from Mediterranean Partner Countries	1st	2nd	3rd	4th	5th	Rest	Total
Creating employment opportunities	43	50	49	55	45	134	376
	11%	13%	13%	15%	12%	36%	100%

Respondents from European Union Countries	1st	2nd	3rd	4th	5th	Rest	Total
Creating employment opportunities	64	90	56	56	22	140	428
	15%	21%	13%	13%	5%	33%	100%

**EU's policies in the near future for the region: selecting policy areas according to priority**

Priority for creating employment opportunities



**D1. Please select and arrange five of the following areas according to what you believe should be the priorities of the EU's policies in the near future.**

TOTAL SURVEY	1st	2nd	3rd	4th	5th	Rest	Total
Institutional and administrative reform	95	126	84	79	78	376	838
	11%	15%	10%	9%	9%	45%	100%

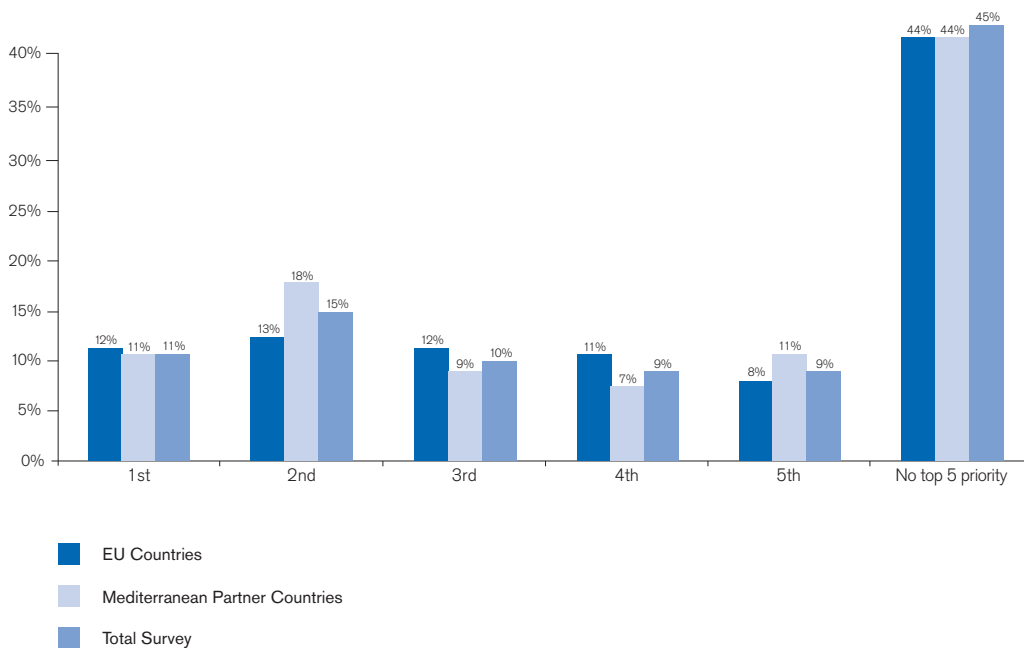
Respondents from Mediterranean Partner Countries	1st	2nd	3rd	4th	5th	Rest	Total
Institutional and administrative reform	40	68	33	27	41	167	376
	11%	18%	9%	7%	11%	44%	100%

Respondents from European Union Countries	1st	2nd	3rd	4th	5th	Rest	Total
Institutional and administrative reform	51	54	51	49	34	189	428
	12%	13%	12%	11%	8%	44%	100%

**EU's policies in the near future for the region: selecting policy areas according to priority**

Priority for institutional and administrative reform

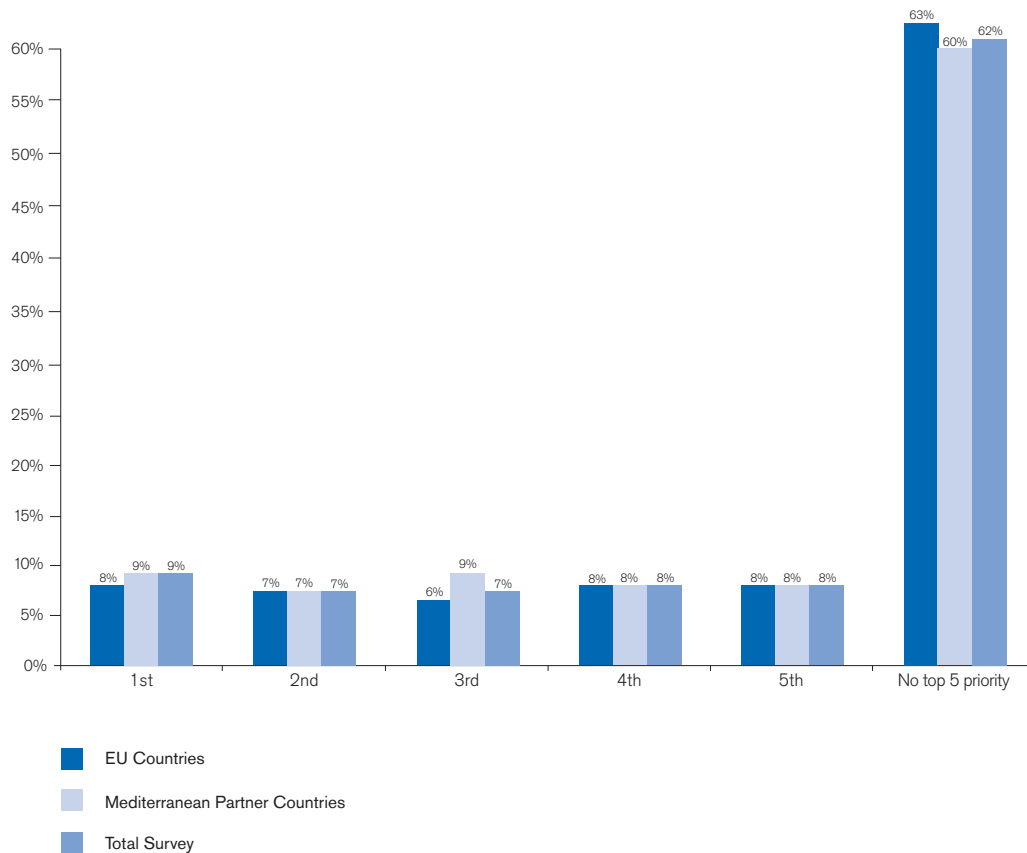


**D1. Please select and arrange five of the following areas according to what you believe should be the priorities of the EU's policies in the near future.**

TOTAL SURVEY	1st	2nd	3rd	4th	5th	Rest	Total
Implementation of the Euro-Mediterranean Free Trade Area	74	55	60	66	64	519	838
	9%	7%	7%	8%	8%	62%	100%
Respondents from Mediterranean Partner Countries	1st	2nd	3rd	4th	5th	Rest	Total
Implementation of the Euro-Mediterranean Free Trade Area	35	26	33	29	29	224	376
	9%	7%	9%	8%	8%	60%	100%
Respondents from European Union Countries	1st	2nd	3rd	4th	5th	Rest	Total
Implementation of the Euro-Mediterranean Free Trade Area	36	30	24	34	34	270	428
	8%	7%	6%	8%	8%	63%	100%

**EU's policies in the near future for the region: selecting policy areas according to priority**

Priority for implementation of the Euro-Mediterranean Free Trade Area



**D1. Please select and arrange five of the following areas according to what you believe should be the priorities of the EU's policies in the near future.**

TOTAL SURVEY	1st	2nd	3rd	4th	5th	Rest	Total
Migration and mobility	72	61	68	77	98	462	838
	9%	7%	8%	9%	12%	55%	100%

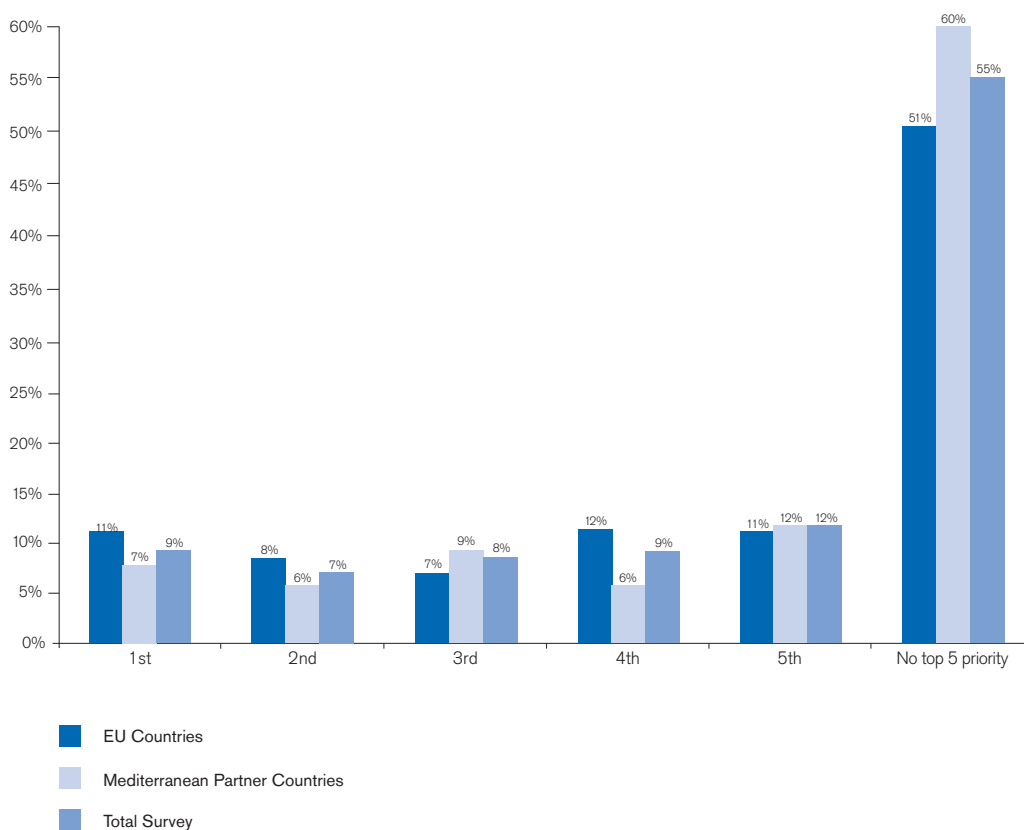
Respondents from Mediterranean Partner Countries	1st	2nd	3rd	4th	5th	Rest	Total
Migration and mobility	26	24	33	21	46	226	376
	7%	6%	9%	6%	12%	60%	100%

Respondents from European Union Countries	1st	2nd	3rd	4th	5th	Rest	Total
Migration and mobility	45	34	32	50	48	219	428
	11%	8%	7%	12%	11%	51%	100%

**EU's policies in the near future for the region: selecting policy areas according to priority**

Priority for the implementation of migration and mobility



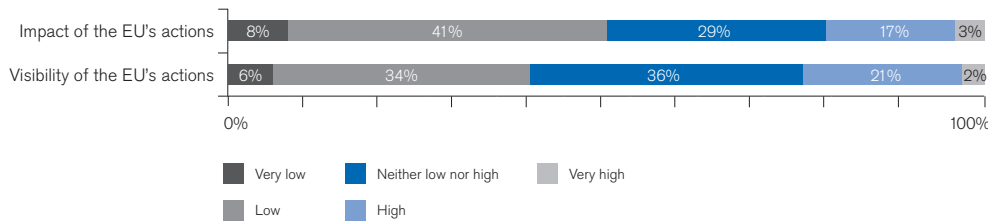
**D2. How do you assess the visibility and impact of the EU's actions in Mediterranean Partner Countries in 2013?**

	Very low	Low	Neither low nor high	High	Very High	Dkn	Total**
Impact of the EU's actions	51	288	300	172	15	12	838
	6%	34%	36%	21%	2%	1%	
Visibility of the EU's actions	69	346	241	141	27	14	838
	8%	41%	29%	17%	3%	2%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the EU's actions in Mediterranean Partner Countries in 2013**



**D2. How do you assess the visibility and impact of the EU's actions in Mediterranean Partner Countries in 2013?**

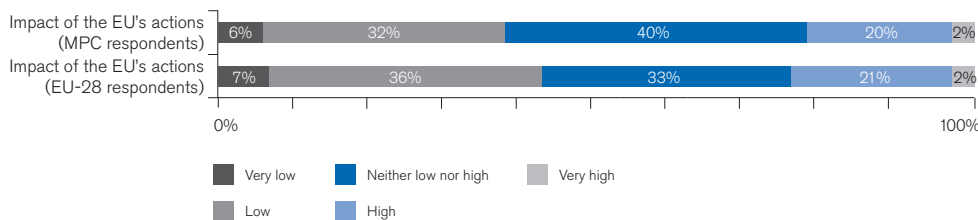
	Very low	Low	Neither low nor high	High	Very High	Dkn	Total**
Impact of the EU's actions (EU-28 respondents)	30	152	143	88	9	6	428
	7%	36%	33%	21%	2%	1%	
Impact of the EU's actions (MPC respondents)	21	119	150	77	6	3	376
	6%	32%	40%	20%	2%	1%	
Visibility of the EU's actions (EU-28 respondents)	43	195	109	63	10	8	428
	10%	46%	25%	15%	2%	2%	
Visibility of the EU's actions (MPC respondents)	22	137	132	67	14	4	376
	6%	36%	35%	18%	4%	1%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

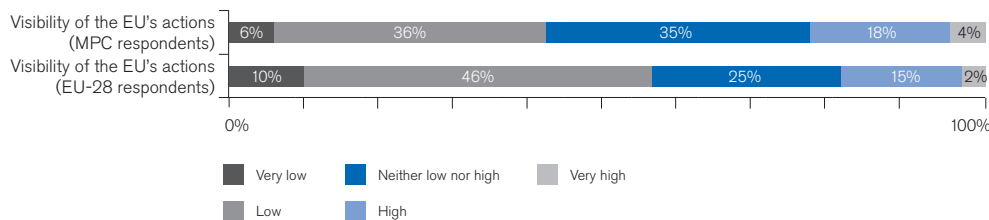
(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the EU's actions in Mediterranean Partner Countries**

(comparing 2012 and 2013 results)



**Assessing the visibility of the EU's actions in Mediterranean Partner Countries**  
(comparing 2012 and 2013 results)



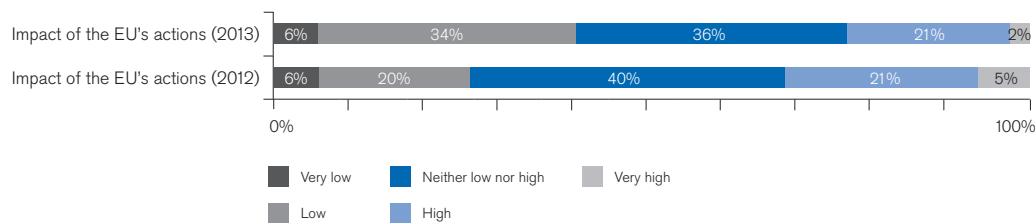
**D2. How do you assess the visibility and impact of the EU's actions in Mediterranean Partner Countries in 2013?**

	Very low	Low	Neither low nor high	High	Very High	Dkn	Total**
Impact of the EU's actions (2012)	50	168	337	175	40	73	843
	6%	20%	40%	21%	5%	9%	
Impact of the EU's actions (2013)	51	288	300	172	15	12	838
	6%	34%	36%	21%	2%	1%	
Visibility of the EU's actions (2012)	65	226	329	124	33	66	843
	8%	27%	39%	15%	4%	8%	
Visibility of the EU's actions (2013)	69	346	241	141	27	14	838
	8%	41%	29%	17%	3%	2%	

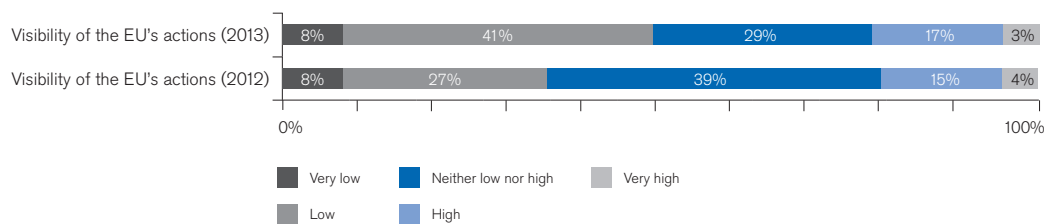
(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the EU's actions in Mediterranean Partner Countries**  
(comparing 2012 and 2013 results)

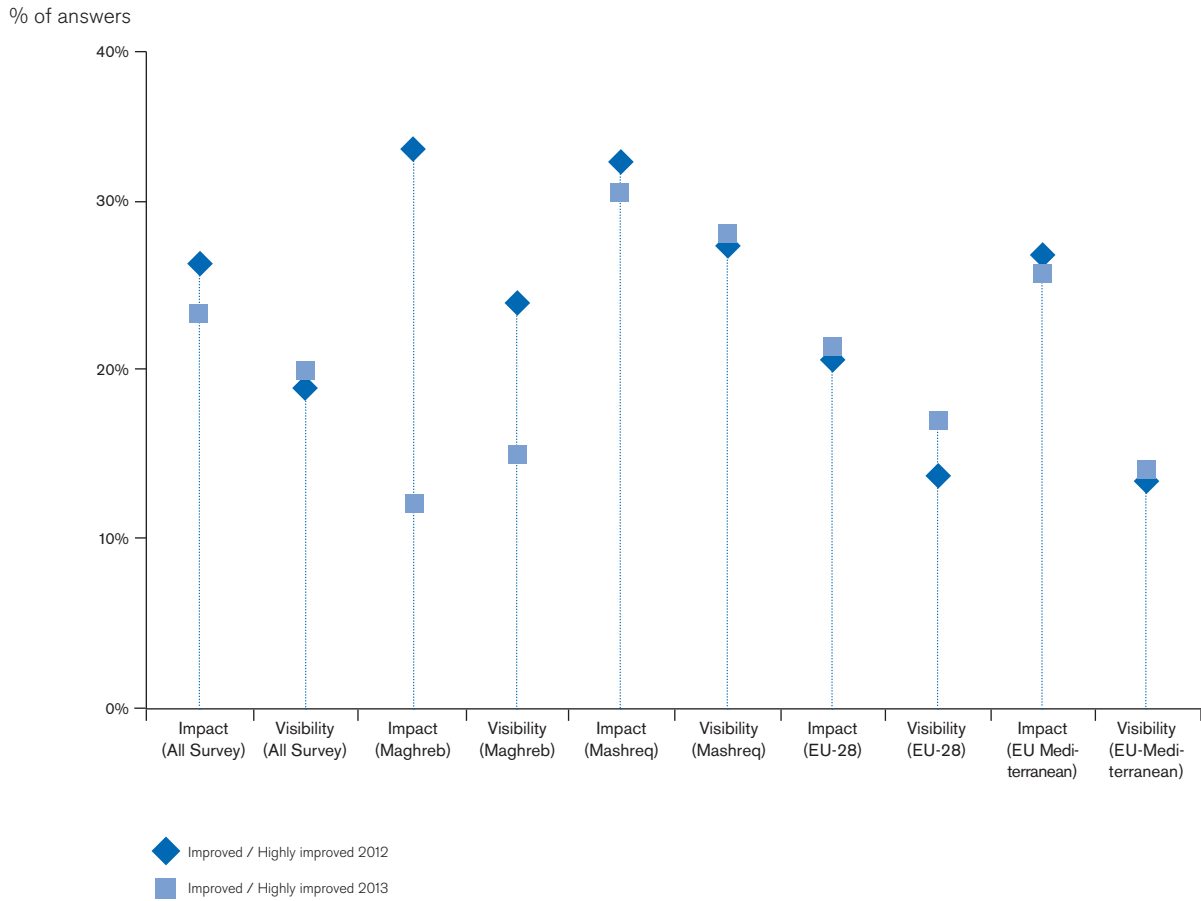


**Assessing the visibility of the EU's actions in Mediterranean Partner Countries**  
(comparing 2012 and 2013 results)



**Comparing the assessment on the visibility and impact of the EU's actions in Mediterranean Partner Countries in 2012 and 2013**

(% of respondents answering High / Very high)



### Domestic and Geopolitical Changes in the Euro-Mediterranean Region

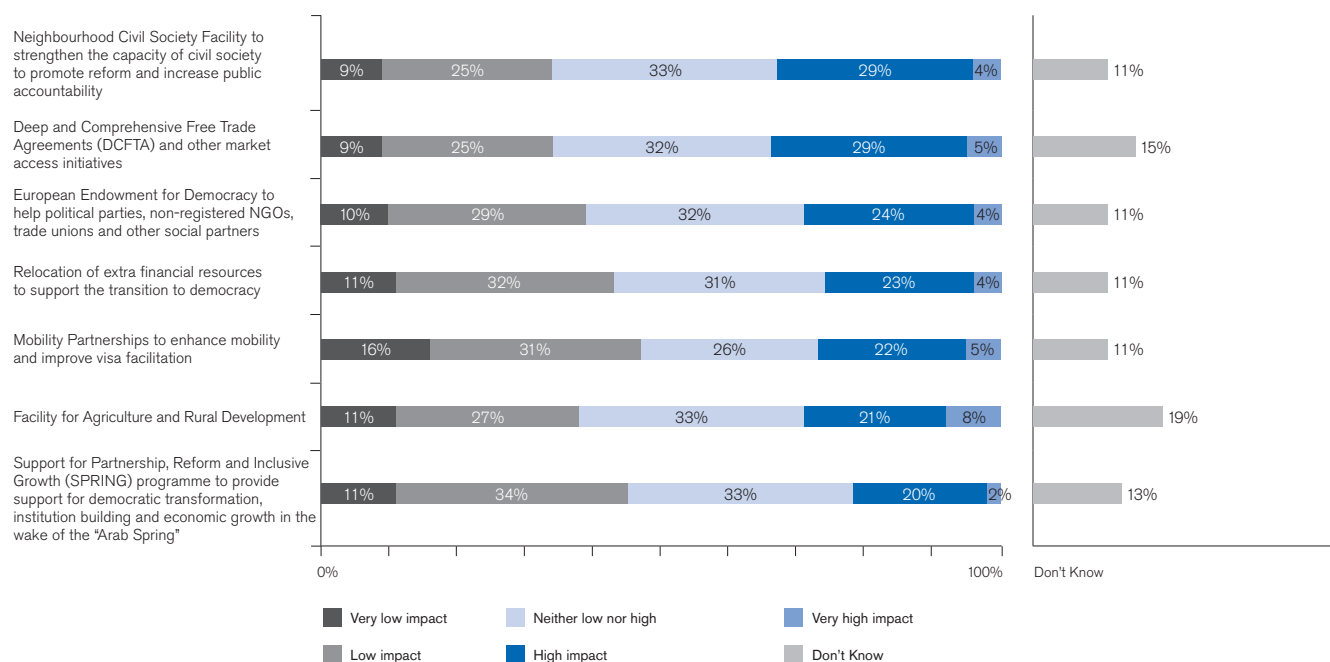
#### D3. How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?

	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total*	Dkn	Total**
Support for Partnership, Reform and Inclusive Growth (SPRING) programme to provide support for democratic transformation, institution building and economic growth in the wake of the "Arab Spring"	79	247	241	144	16	727	111	838
	11%	34%	33%	20%	2%	100%	13%	
Relocation of extra financial resources to support the transition to democracy	82	236	227	170	29	744	94	838
	11%	32%	31%	23%	4%	100%	11%	
Mobility Partnerships to enhance mobility and improve visa facilitation	117	233	194	164	38	746	92	838
	16%	31%	26%	22%	5%	100%	11%	
Deep and Comprehensive Free Trade Agreements (DCFTA) and other market access initiatives	65	178	230	205	37	715	123	838
	9%	25%	32%	29%	5%	100%	15%	
Neighbourhood Civil Society Facility to strengthen the capacity of civil society to promote reform and increase public accountability	67	185	249	219	29	749	89	838
	9%	25%	33%	29%	4%	100%	11%	
European Endowment for Democracy to help political parties, non-registered NGOs, trade unions and other social partners	78	217	241	175	32	743	95	838
	10%	29%	32%	24%	4%	100%	11%	
Facility for Agriculture and Rural Development	76	183	224	143	52	678	160	838
	11%	27%	33%	21%	8%	100%	19%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

#### Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries



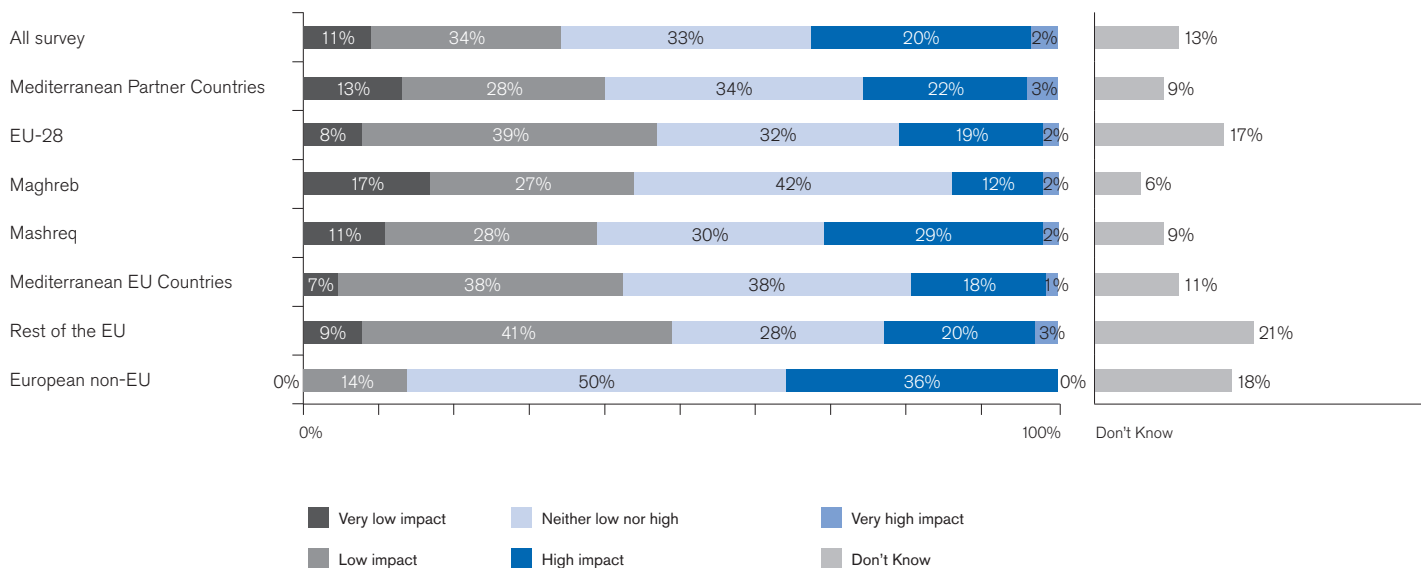
**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

Support for Partnership, Reform and Inclusive Growth (SPRING)	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total*	Dkn	Total**
All survey	79 11%	247 34%	241 33%	144 20%	16 2%	727 100%	111 13%	838
Mediterranean Partner Countries	44 13%	97 28%	117 34%	74 22%	9 3%	341 100%	35 9%	376
EU-28	28 8%	140 39%	114 32%	67 19%	7 2%	356 100%	72 17%	428
Maghreb	23 17%	36 27%	56 42%	16 12%	3 2%	134 100%	9 6%	143
Mashreq	15 11%	37 28%	40 30%	39 29%	3 2%	134 100%	14 9%	148
Mediterranean EU Countries	10 7%	57 38%	57 38%	27 18%	1 1%	152 100%	19 11%	171
Rest of EU	18 9%	83 41%	57 28%	40 20%	6 3%	204 100%	53 21%	257
European non-EU	0 0%	2 14%	7 50%	5 36%	0 0%	14 100%	3 18%	17

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries: SUPPORT FOR PARTNERSHIP, REFORM AND INCLUSIVE GROWTH (SPRING)**



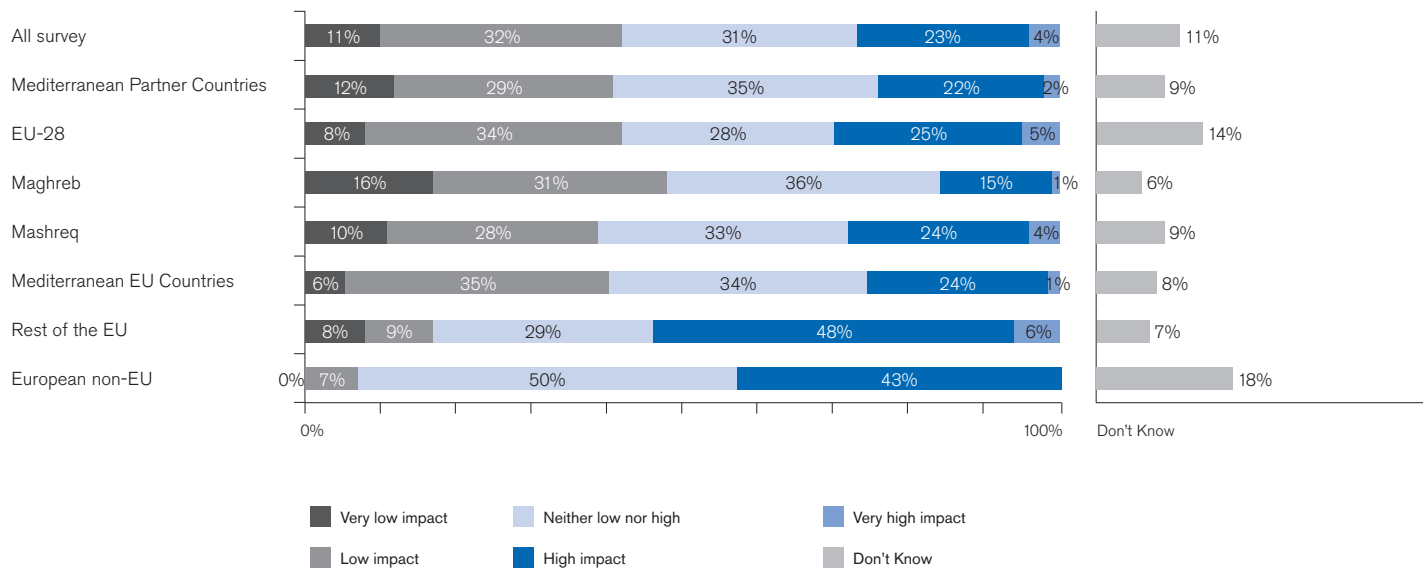
**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

Relocation of extra financial resources to support the transition to democracy	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total*	Dkn	Total**
All survey	82	236	227	170	29	744	94	838
	11%	32%	31%	23%	4%	100%	11%	
Mediterranean Partner Countries	42	98	120	75	8	343	33	376
	12%	29%	35%	22%	2%	100%	9%	
EU-28	30	127	104	92	17	370	58	428
	8%	34%	28%	25%	5%	100%	14%	
Maghreb	22	42	49	20	2	135	8	143
	16%	31%	36%	15%	1%	100%	6%	
Mashreq	14	38	45	32	6	135	13	148
	10%	28%	33%	24%	4%	100%	9%	
Mediterranean EU Countries	10	54	53	37	2	156	14	170
	6%	35%	34%	24%	1%	100%	8%	
Rest of EU	20	22	74	124	16	256	19	275
	8%	9%	29%	48%	6%	100%	7%	
European non-EU	0	1	7	6	0	14	3	17
	0%	7%	50%	43%	0%	100%	18%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries: RELOCATION OF EXTRA FINANCIAL RESOURCES TO SUPPORT THE TRANSITION TO DEMOCRACY**



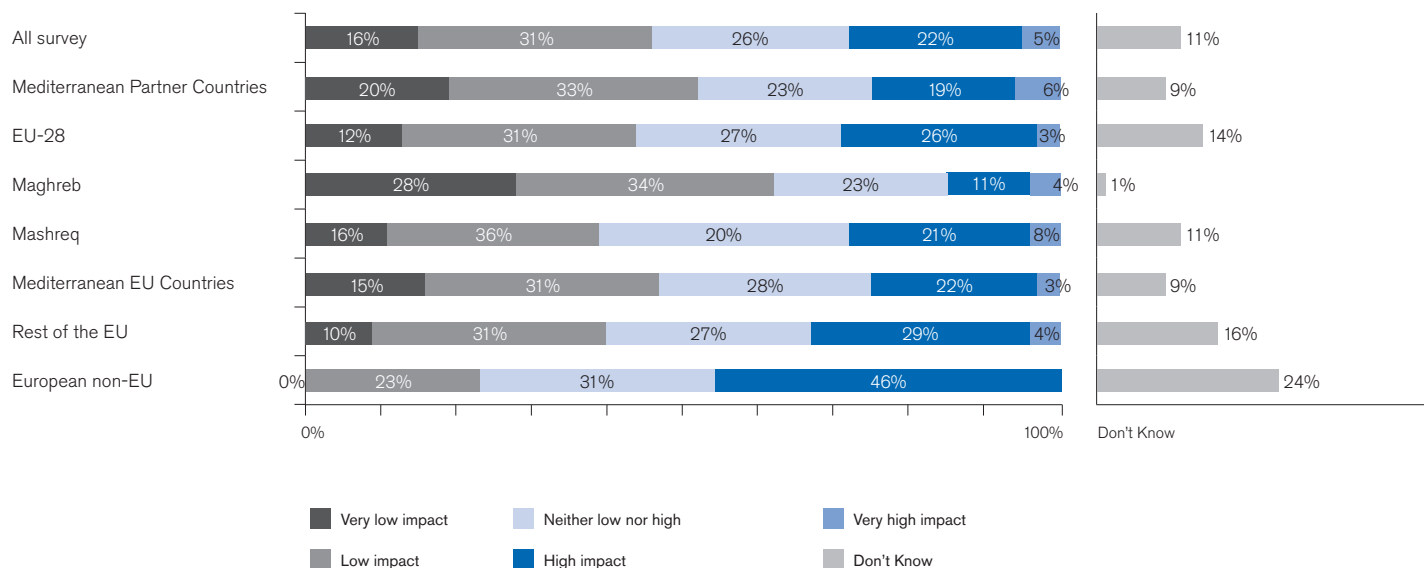
**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

Mobility Partnerships to enhance mobility and improve visa facilitation						Total*	Dkn	Total**
	Very low impact	Low impact	Neither low nor high	High impact	Very high impact			
All survey	117	233	194	164	38	746	92	838
	16%	31%	26%	22%	5%	100%	11%	
Mediterranean Partner Countries	68	112	80	64	20	344	32	376
	20%	33%	23%	19%	6%	100%	9%	
EU-28	46	114	100	97	12	369	59	428
	12%	31%	27%	26%	3%	100%	14%	
Maghreb	40	48	32	16	6	142	1	143
	28%	34%	23%	11%	4%	100%	1%	
Mashreq	21	47	26	28	10	132	16	148
	16%	36%	20%	21%	8%	100%	11%	
Mediterranean EU Countries	24	49	43	35	5	156	15	171
	15%	31%	28%	22%	3%	100%	9%	
Rest of EU	22	66	58	62	8	216	41	257
	10%	31%	27%	29%	4%	100%	16%	
European non-EU	0	3	4	6	0	13	4	17
	0%	23%	31%	46%	0%	100%	24%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries:**  
 MOBILITY PARTNERSHIPS TO ENHANCE MOBILITY AND IMPROVE VISA FACILITATION



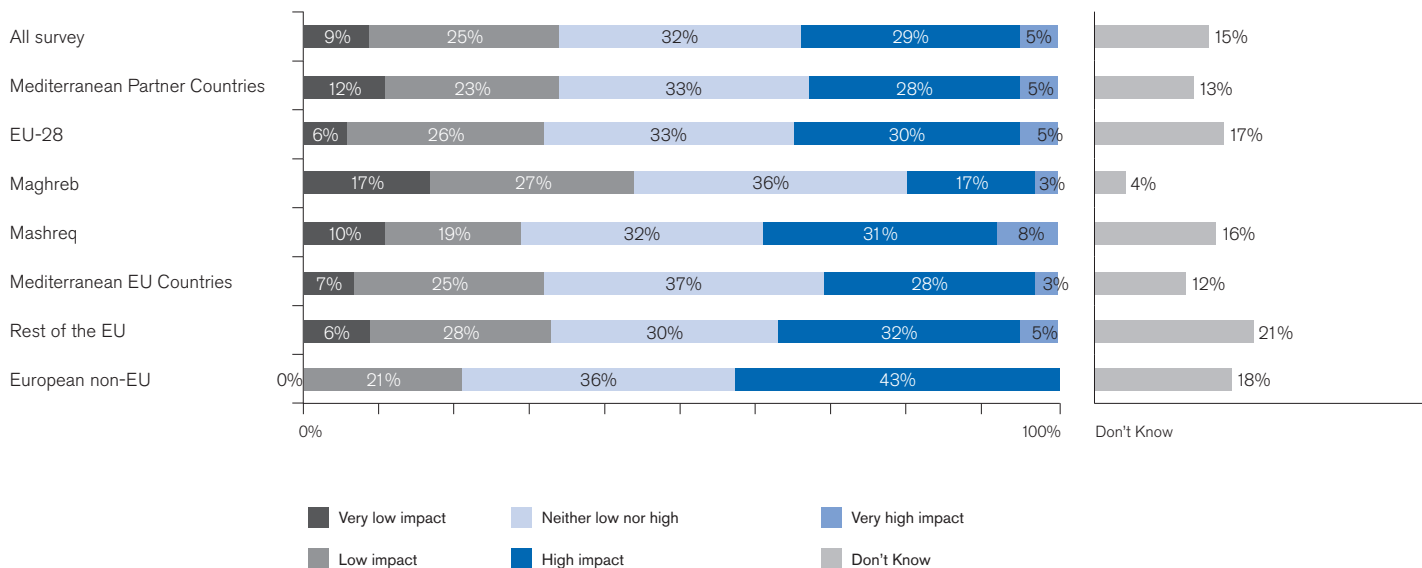
**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

Deep and Comprehensive Free Trade Agreements (DCFTA) and other market access initiatives	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total*	Dkn	Total**
All survey	65	178	230	205	37	715	123	838
	9%	25%	32%	29%	5%	100%	15%	
Mediterranean Partner Countries	39	75	107	91	17	329	47	376
	12%	23%	33%	28%	5%	100%	13%	
EU-28	22	93	116	107	16	354	74	428
	6%	26%	33%	30%	5%	100%	17%	
Maghreb	23	37	50	24	4	138	6	144
	17%	27%	36%	17%	3%	100%	4%	
Mashreq	12	24	40	38	10	124	24	148
	10%	19%	32%	31%	8%	100%	16%	
Mediterranean EU Countries	10	37	56	42	5	150	21	171
	7%	25%	37%	28%	3%	100%	12%	
Rest of EU	12	56	60	64	11	203	54	257
	6%	28%	30%	32%	5%	100%	21%	
European non-EU	0	3	5	6	0	14	3	17
	0%	21%	36%	43%	0%	100%	18%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries: DEEP AND COMPREHENSIVE FREE TRADE AGREEMENTS (DCFTA) AND OTHER MARKET ACCESS INITIATIVES**



**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

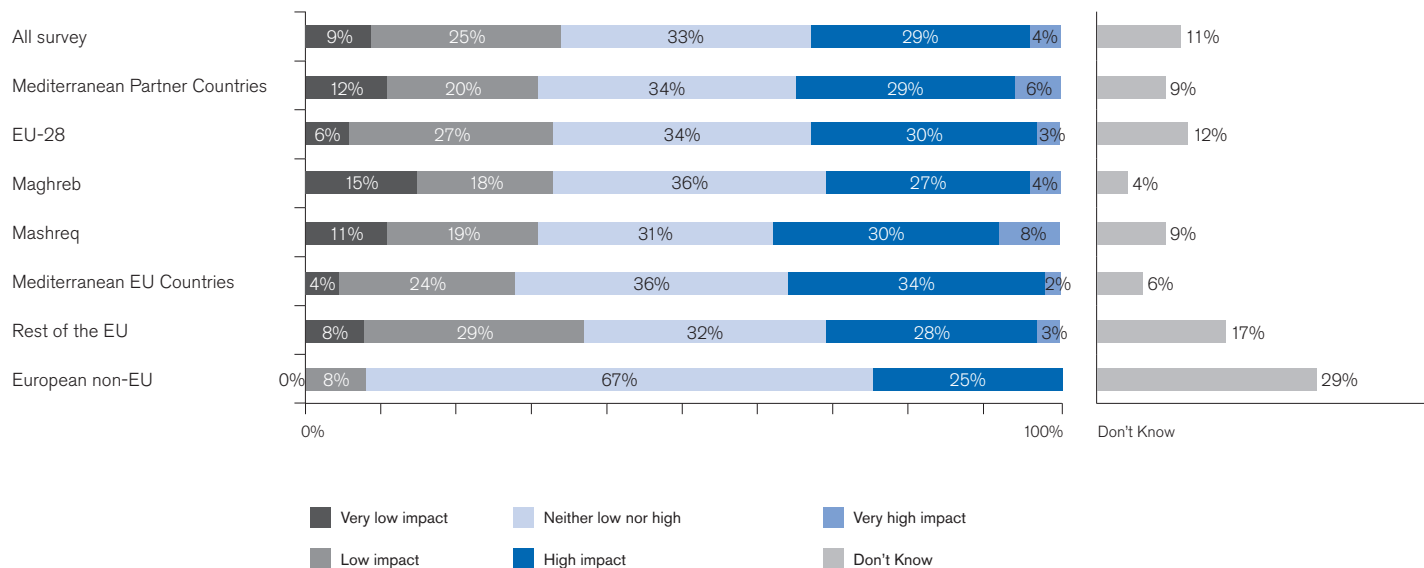
Neighbourhood Civil Society Facility to strengthen the capacity of civil society to promote reform and increase public accountability	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total*	Dkn	Total**
	All survey	67	185	249	219	29	749	89
Mediterranean Partner Countries	40	68	118	99	19	344	32	376
EU-28	24	100	127	113	11	375	53	428
Maghreb	21	24	49	37	6	137	6	143
Mashreq	15	26	42	40	11	134	14	148
Mediterranean EU Countries	7	38	58	54	3	160	11	171
Rest of EU	17	62	69	59	7	214	43	257
European non-EU	0	1	8	3	0	12	5	17
	9%	25%	33%	29%	4%	100%	11%	
	12%	20%	34%	29%	6%	100%	9%	
	6%	27%	34%	30%	3%	100%	12%	
	15%	18%	36%	27%	4%	100%	4%	
	11%	19%	31%	30%	8%	100%	9%	
	4%	24%	36%	34%	2%	100%	6%	
	8%	29%	32%	28%	3%	100%	17%	
	0%	8%	67%	25%	0%	100%	29%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries:**

NEIGHBOURHOOD CIVIL SOCIETY FACILITY TO STRENGTHEN THE CAPACITY OF CIVIL SOCIETY TO PROMOTE REFORM AND INCREASE PUBLIC ACCOUNTABILITY



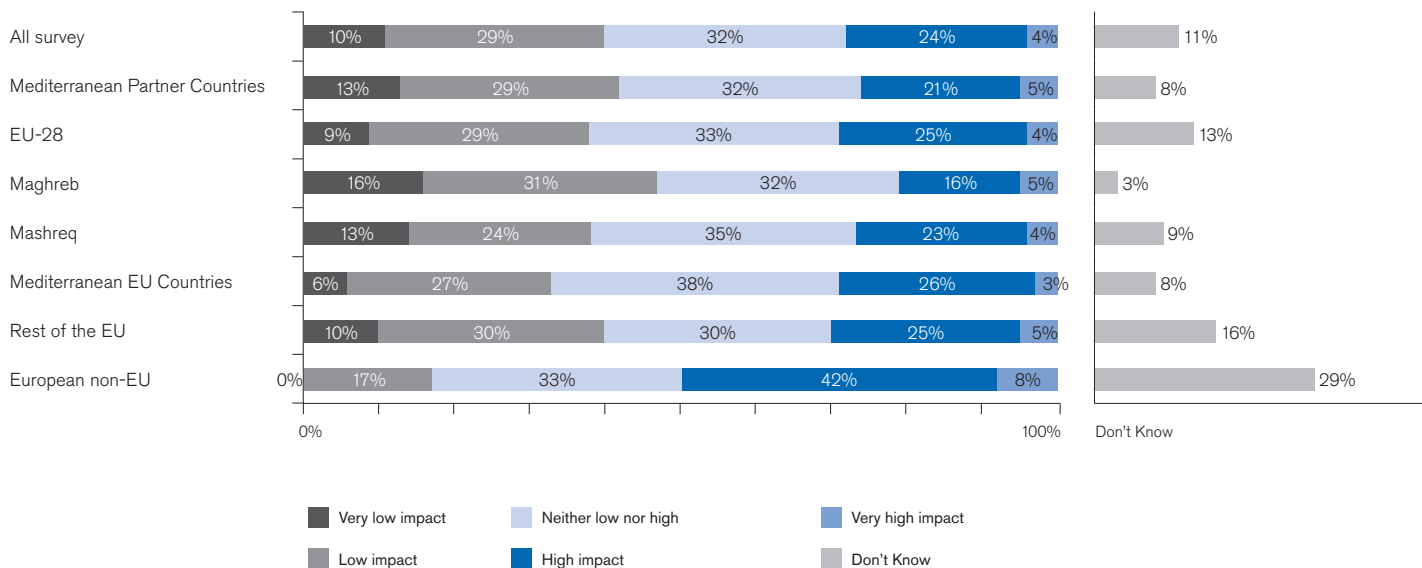
**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

European Endowment for Democracy to help political parties, non-registered NGOs, trade unions and other social partners						Total*	Dkn	Total**
	Very low impact	Low impact	Neither low nor high	High impact	Very high impact			
All survey	78	217	241	175	32	743	95	838
	10%	29%	32%	24%	4%	100%	11%	
Mediterranean Partner Countries	45	100	111	73	17	346	30	376
	13%	29%	32%	21%	5%	100%	8%	
EU-28	32	107	124	95	15	373	55	428
	9%	29%	33%	25%	4%	100%	13%	
Maghreb	22	43	45	22	7	139	4	143
	16%	31%	32%	16%	5%	100%	3%	
Mashreq	18	32	47	31	6	134	14	148
	13%	24%	35%	23%	4%	100%	9%	
Mediterranean EU Countries	10	43	59	41	4	157	14	171
	6%	27%	38%	26%	3%	100%	8%	
Rest of EU	22	64	65	54	11	216	41	257
	10%	30%	30%	25%	5%	100%	16%	
European non-EU	0	2	4	5	1	12	5	17
	0%	17%	33%	42%	8%	100%	29%	

(\* ) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries: EUROPEAN ENDOWMENT FOR DEMOCRACY TO HELP POLITICAL PARTIES, NON-REGISTERED NGOS, TRADE UNIONS AND OTHER SOCIAL PARTNERS**



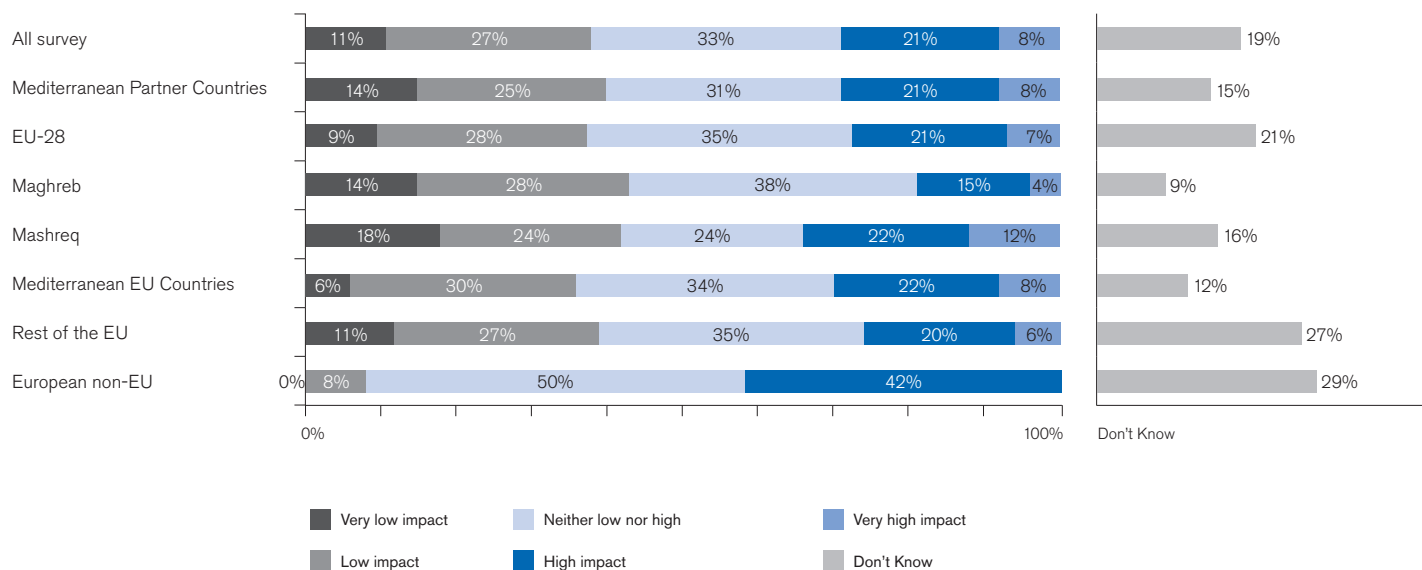
**D.3 How would you assess the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries?**

Facility for Agriculture and Rural Development	Very low impact	Low impact	Neither low nor high	High impact	Very high impact	Total*	Dkn	Total**
All survey	76 11%	183 27%	224 33%	143 21%	52 8%	678 100%	160 19%	838
Mediterranean Partner Countries	46 14%	81 25%	100 31%	68 21%	25 8%	320 100%	56 15%	376
EU-28	30 9%	95 28%	117 35%	71 21%	23 7%	336 100%	92 21%	428
Maghreb	18 14%	37 28%	50 38%	20 15%	5 4%	130 100%	13 9%	143
Mashreq	23 18%	30 24%	30 24%	27 22%	15 12%	125 100%	23 16%	148
Mediterranean EU Countries	9 6%	45 30%	51 34%	33 22%	12 8%	150 100%	21 12%	171
Rest of EU	21 11%	51 27%	66 35%	38 20%	11 6%	187 100%	70 27%	257
European non-EU	0 0%	1 8%	6 50%	5 42%	0 0%	12 100%	5 29%	17

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Assessing the impact of the following measures of the European Neighbourhood Policy (ENP) on the Southern Mediterranean countries:**  
FACILITY FOR AGRICULTURE AND RURAL DEVELOPMENT



#### D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?

	Very low priority	Low priority	Neither low nor high	High priority	Very high priority	Total*	Dkn	Total**
<b>Social and Civic Affairs</b>								
Developing women's empowerment	19	67	145	373	202	806	32	838
	2%	8%	18%	46%	25%	100%	4%	
Young women as job creators	21	60	136	406	183	806	32	838
	3%	7%	17%	50%	23%	100%	4%	
Skills for success - employability skills for women	20	47	121	396	220	804	34	838
	2%	6%	15%	49%	27%	100%	4%	
<b>Higher Education and Research</b>								
Higher education on food security and rural development	18	54	154	357	212	795	43	838
	2%	7%	19%	45%	27%	100%	5%	
Creation of the Euro-Mediterranean University of Fes	40	108	252	249	118	767	71	838
	5%	14%	33%	32%	15%	100%	8%	
Euro-Mediterranean masters and PhDs	33	84	237	269	176	799	39	838
	4%	11%	30%	34%	22%	100%	5%	
<b>Environment and Water</b>								
Governance and financing for the Mediterranean water sector	12	42	97	360	279	790	48	838
	2%	5%	12%	46%	35%	100%	6%	
The "Desalination Facility" for the Gaza Strip Project	18	41	107	313	286	765	73	838
	2%	5%	14%	41%	37%	100%	9%	
<b>Transport and Urban Development</b>								
Jordanian Railway Network	22	80	262	238	58	660	178	838
	3%	12%	40%	36%	9%	100%	21%	
The Euro-Mediterranean Sustainable Urban Development Strategy	12	54	177	325	154	722	116	838
	2%	7%	25%	45%	21%	100%	14%	
LOGISMED training activities	11	58	217	236	58	580	258	838
	2%	10%	37%	41%	10%	100%	31%	
Completion of the central section of the trans-Maghreb motorway axis	17	55	194	264	141	671	167	838
	3%	8%	29%	39%	21%	100%	20%	
<b>Business Development</b>								
Mediterranean Initiative for Jobs	16	39	122	355	231	763	75	838
	2%	5%	16%	47%	30%	95%	9%	
Euro-Mediterranean Development Centre for Enterprises	17	51	159	346	168	741	97	838
	2%	7%	21%	47%	23%	100%	12%	
<b>Energy</b>								
Mediterranean Solar Plan	21	43	123	312	256	755	83	838
	3%	6%	16%	41%	34%	100%	10%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

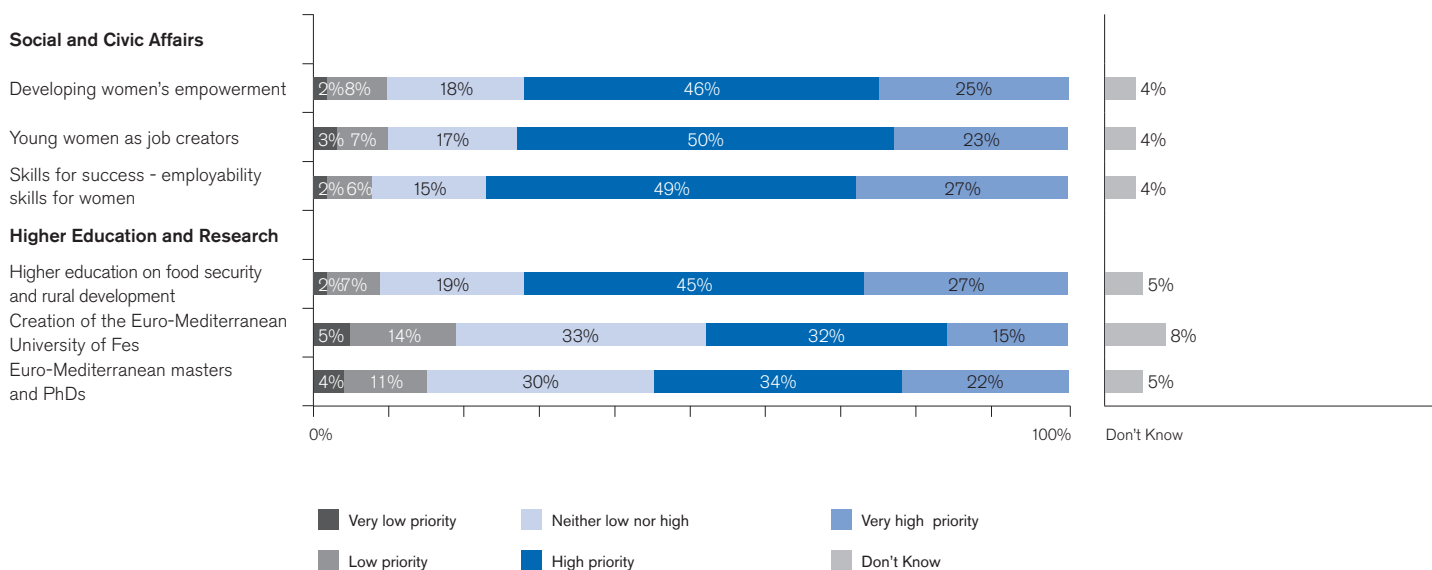
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

	Very low priority	Low priority	Neither low nor high	High priority	Very high priority	Total*	Dkn	Total**
<b>Social and Civic Affairs</b>								
Developing women's empowerment	19	67	145	373	202	806	32	838
	2%	8%	18%	46%	25%	100%	4%	
Young women as job creators	21	60	136	406	183	806	32	838
	3%	7%	17%	50%	23%	100%	4%	
Skills for success - employability skills for women	20	47	121	396	220	804	34	838
	2%	6%	15%	49%	27%	100%	4%	
<b>Higher Education and Research</b>								
Higher education on food security and rural development	18	54	154	357	212	795	43	838
	2%	7%	19%	45%	27%	100%	5%	
Creation of the Euro-Mediterranean University of Fes	40	108	252	249	118	767	71	838
	5%	14%	33%	32%	15%	100%	8%	
Euro-Mediterranean masters and PhDs	33	84	237	269	176	799	39	838
	4%	11%	30%	34%	22%	100%	5%	

(\* Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Degree of priority attributed to the following projects of the Union for the Mediterranean**



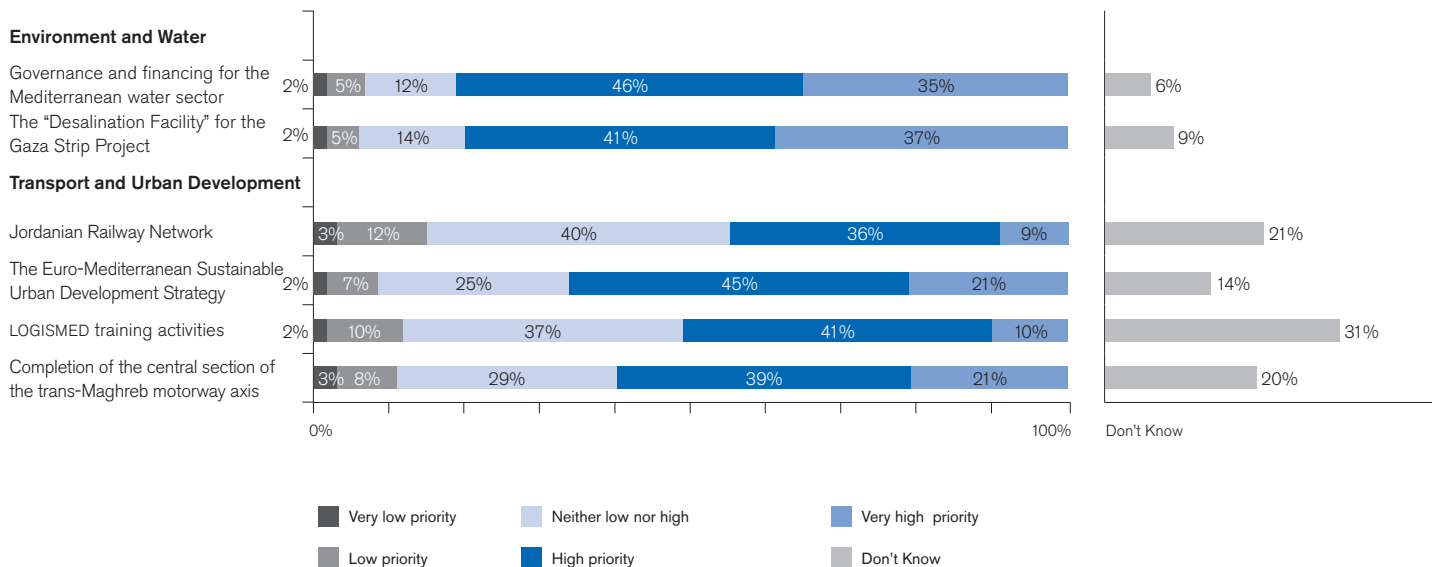
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

	Very low priority	Low priority	Neither low nor high	High priority	Very high priority	Total*	Dkn	Total**
<b>Environment and Water</b>								
Governance and financing for the Mediterranean water sector	12 2%	42 5%	97 12%	360 46%	279 35%	790 100%	48 6%	838
The "Desalination Facility" for the Gaza Strip Project	18 2%	41 5%	107 14%	313 41%	286 37%	765 100%	73 9%	838
<b>Transport and Urban Development</b>								
Jordanian Railway Network	22 3%	80 12%	262 40%	238 36%	58 9%	660 100%	178 21%	838
The Euro-Mediterranean Sustainable Urban Development Strategy	12 2%	54 7%	177 25%	325 45%	154 21%	722 100%	116 14%	838
LOGISMED training activities	11 2%	58 10%	217 37%	236 41%	58 10%	580 100%	258 31%	838
Completion of the central section of the trans-Maghreb motorway axis	17 3%	55 8%	194 29%	264 39%	141 21%	671 100%	167 20%	838

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

(\*\*) Total number of respondents including "Don't know" answers

**Degree of priority attributed to the following projects of the Union for the Mediterranean**



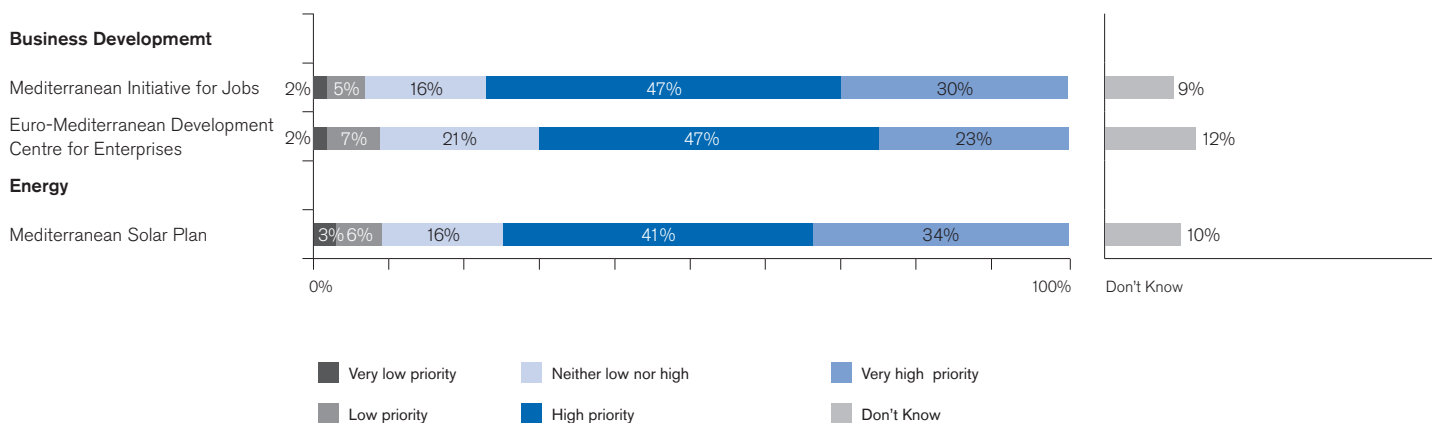
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

	Very low priority	Low priority	Neither low nor high	High priority	Very high priority	Total*	Dkn	Total**
<b>Business Development</b>								
Mediterranean Initiative for Jobs	16	39	122	355	231	<b>763</b>	75	838
	2%	5%	16%	47%	30%	<b>95%</b>	9%	
Euro-Mediterranean Development Centre for Enterprises	17	51	159	346	168	<b>741</b>	97	838
	2%	7%	21%	47%	23%	<b>100%</b>	12%	
<b>Business Development</b>								
Mediterranean Solar Plan	21	43	123	312	256	<b>755</b>	83	838
	3%	6%	16%	41%	34%	<b>100%</b>	10%	

(\*) Total number of answers expressing a particular assessment or opinion (i.e. excluding "Don't know" answers)

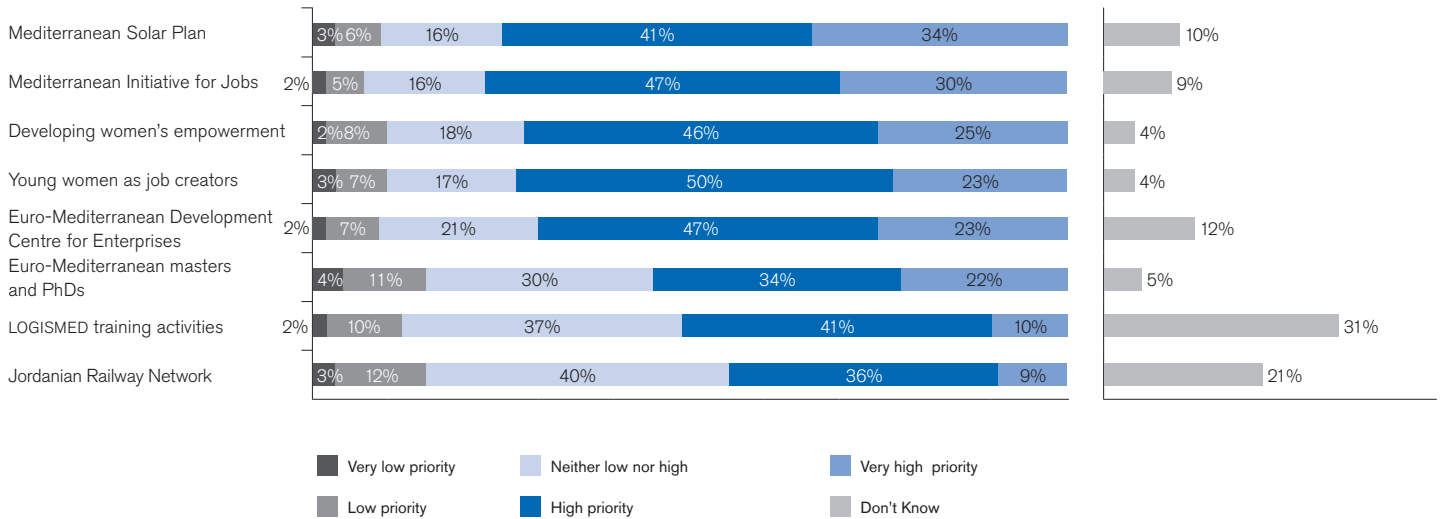
(\*\*) Total number of respondents including "Don't know" answers

**Degree of priority attributed to the following projects of the Union for the Mediterranean**



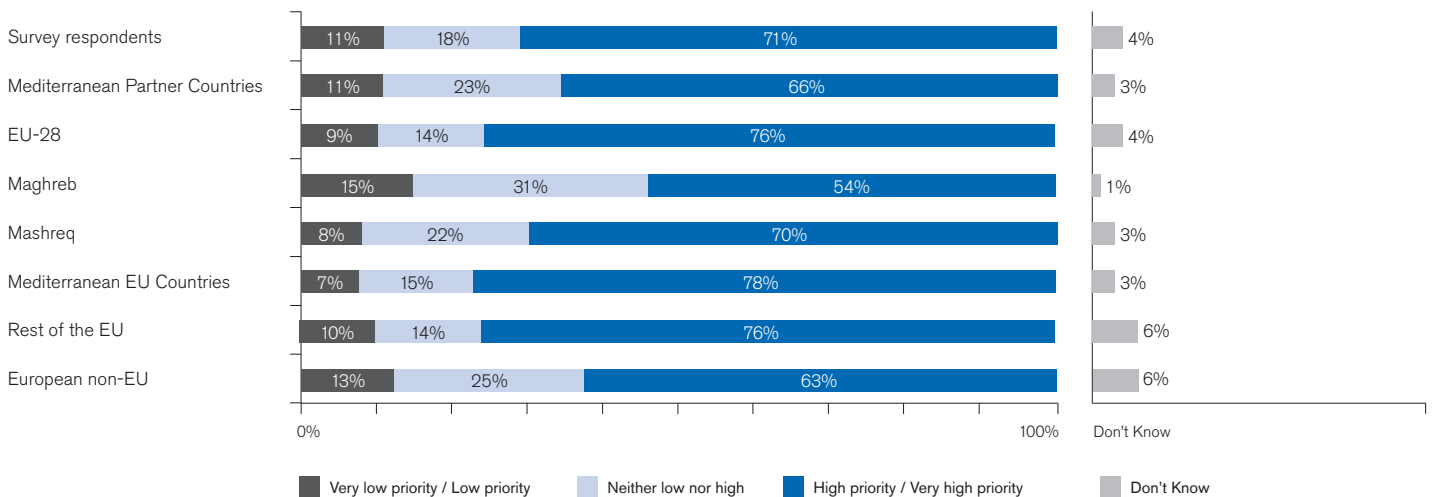
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean** (ordered by % of "Very high priority" answers)



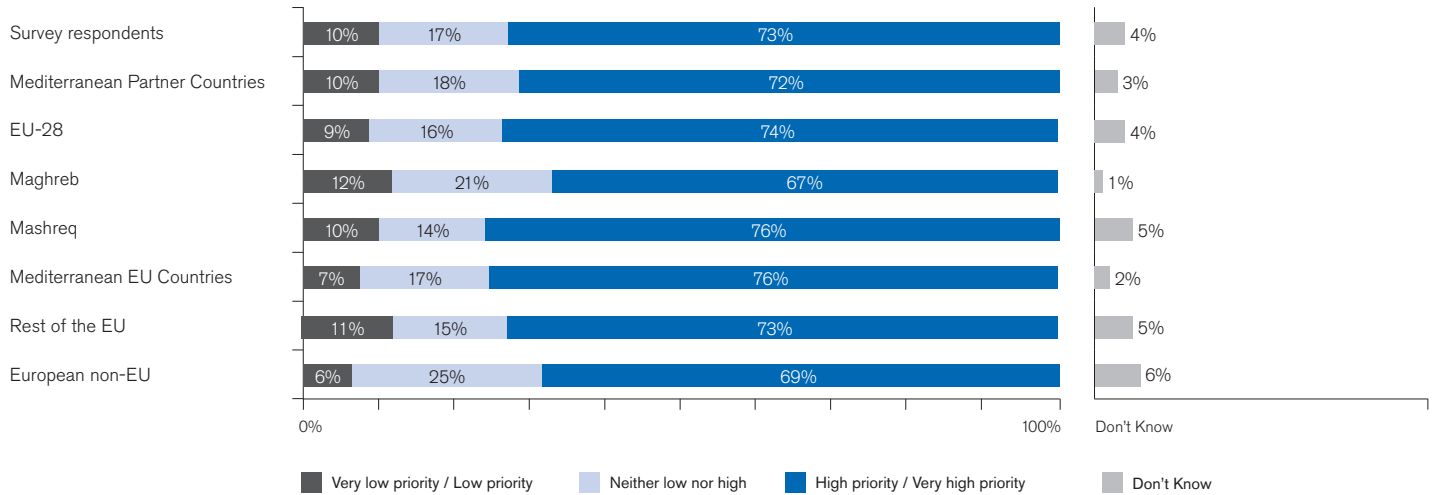
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: DEVELOPING WOMEN'S EMPOWERMENT**



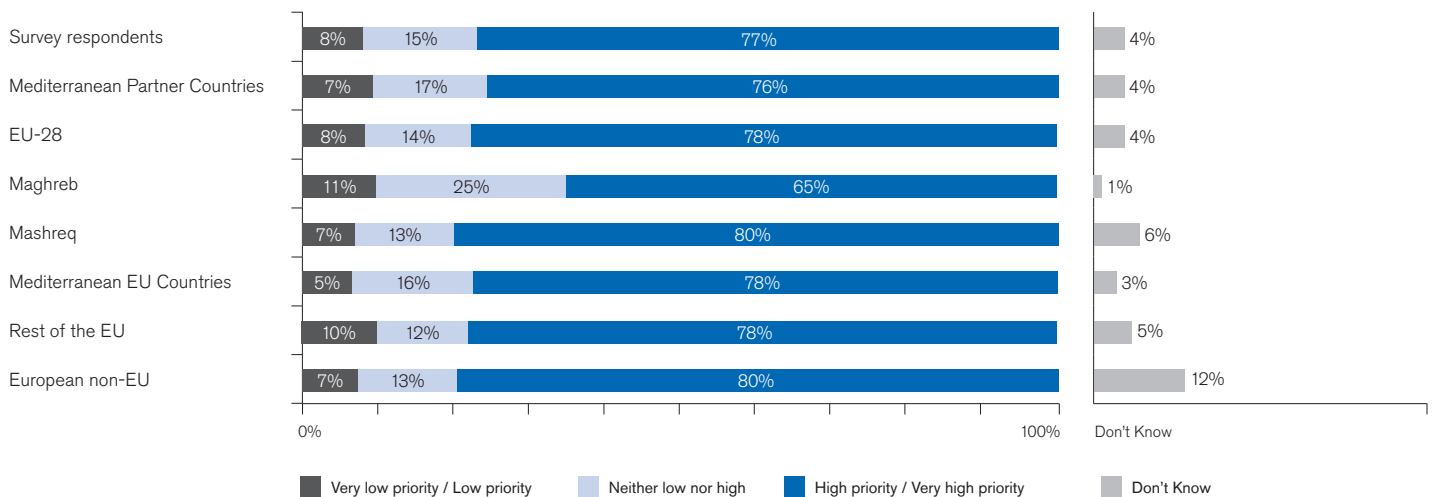
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: YOUNG WOMEN AS JOB CREATORS**



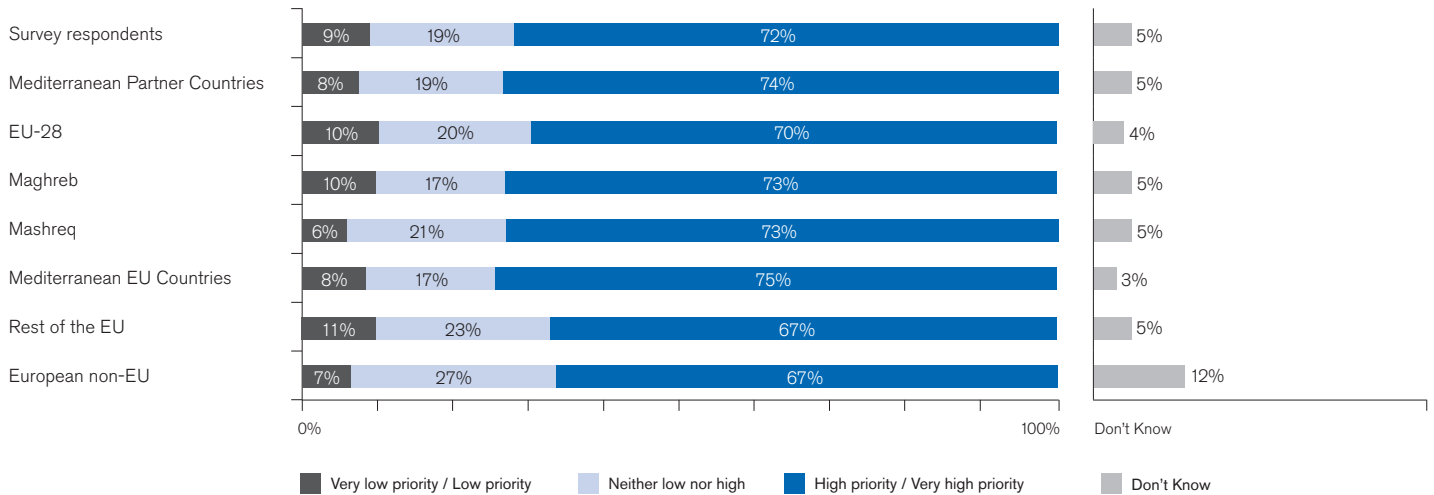
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: SKILLS FOR SUCES - EMPLOYABILITY FOR WOMEN**



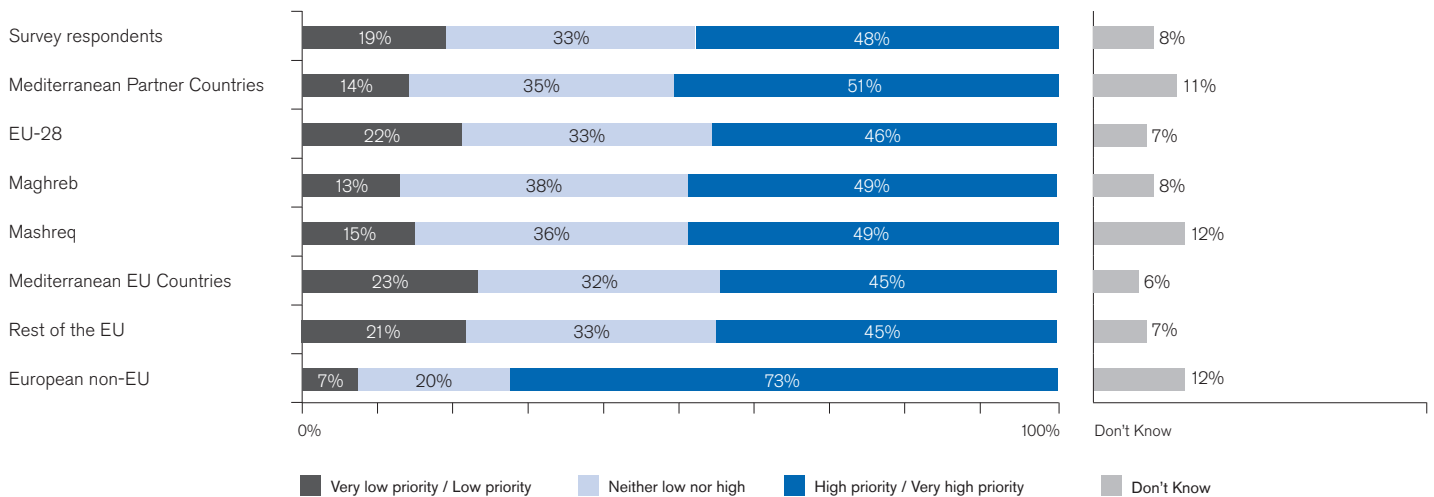
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: HIGHER EDUCATION ON FOOD SECURITY AND RURAL DEVELOPMENT**



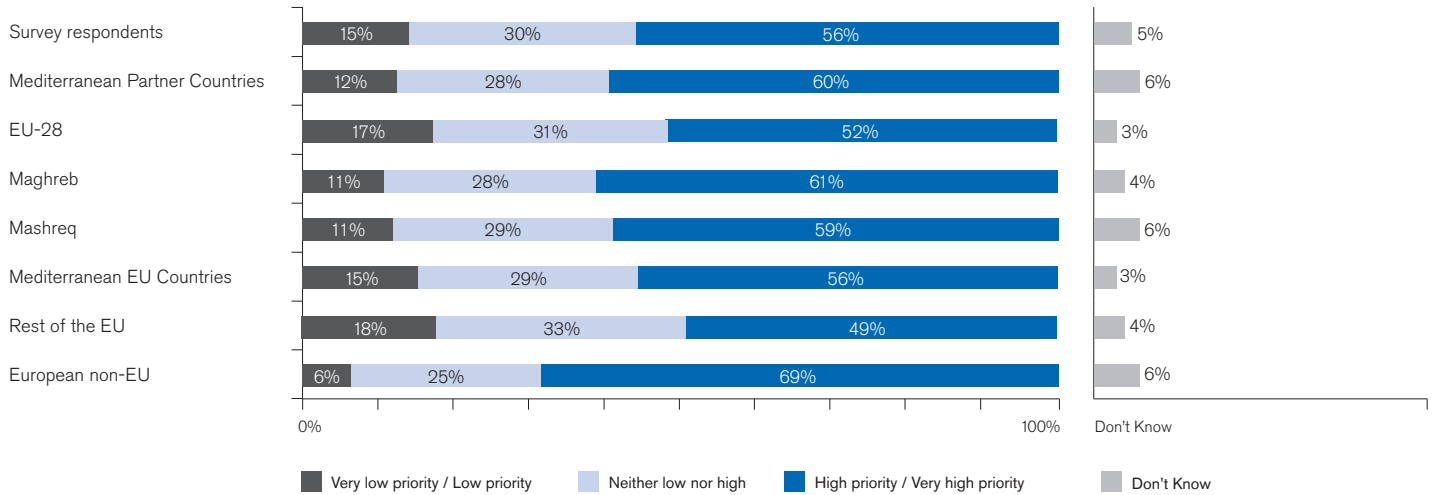
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: CREATION OF THE EURO-MEDITERRANEAN UNIVERSITY OF FES**



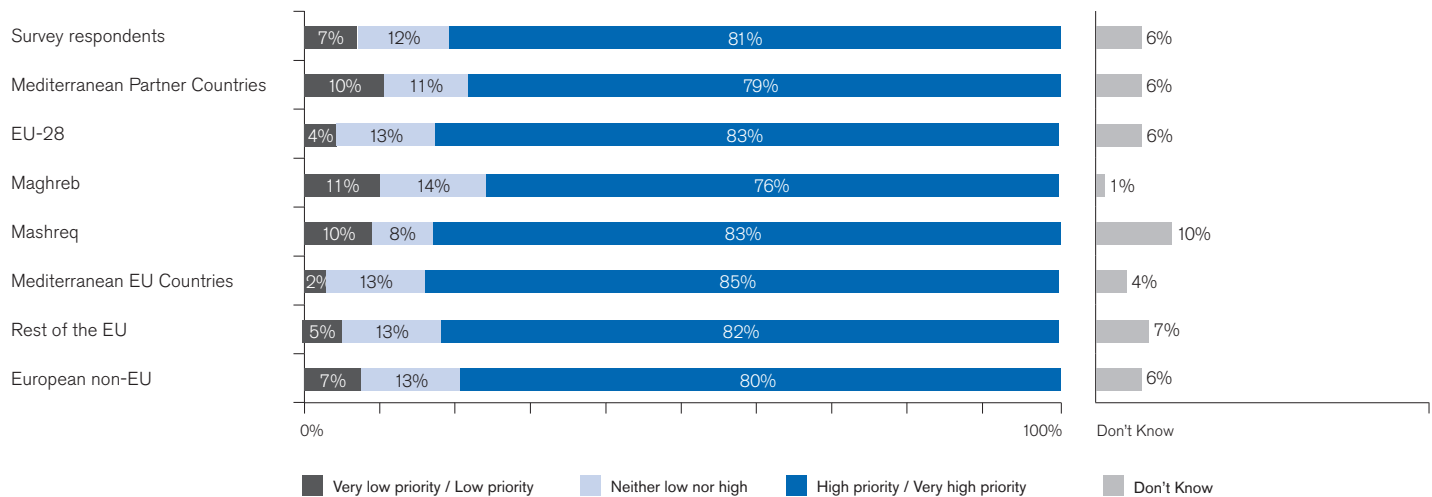
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: EURO-MEDITERRANEAN MASTERS AND PHDS**



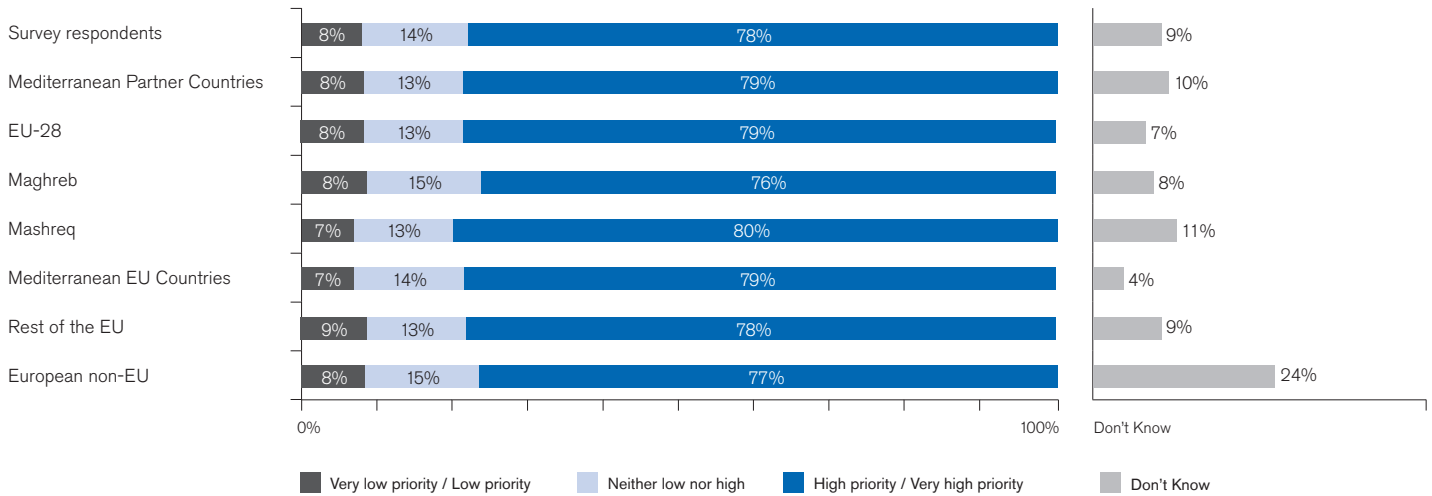
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: GOVERNANCE AND FINANCING FOR THE MEDITERRANEAN WATER SECTOR**



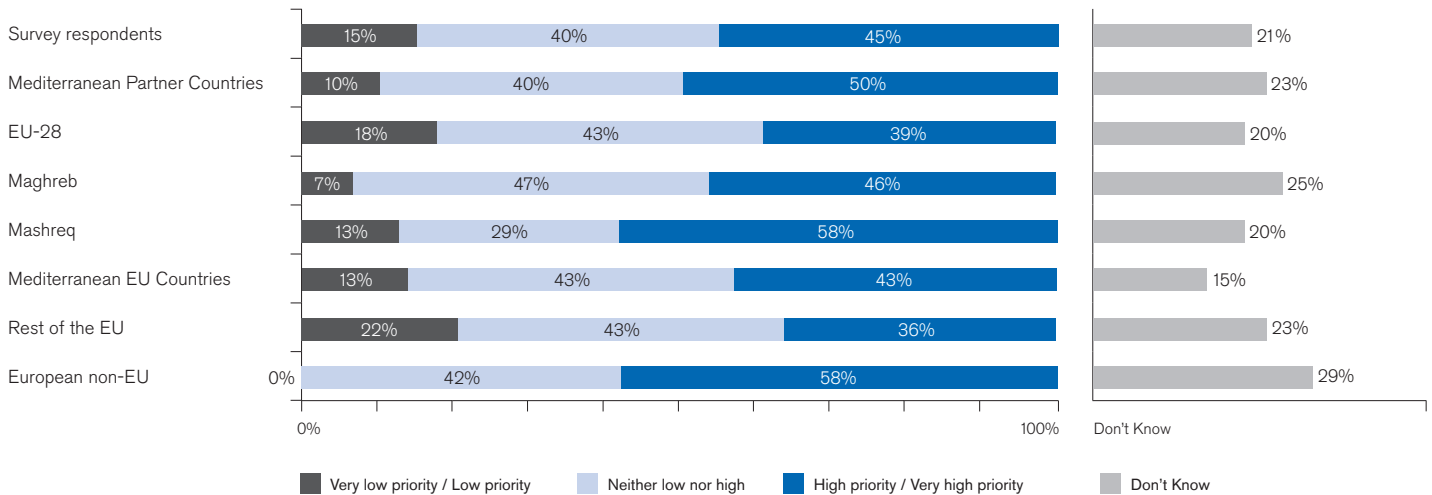
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: THE "DESALINATION FACILITY" FOR THE GAZA STRIP PROJECT**



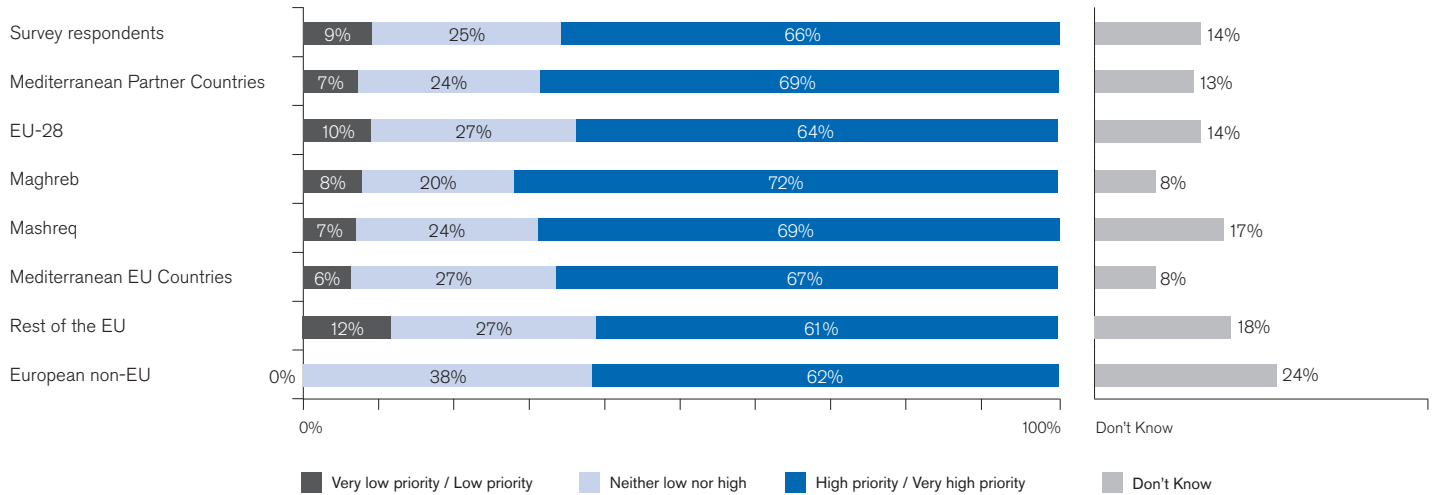
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: JORDANIAN RAILWAY NETWORK**



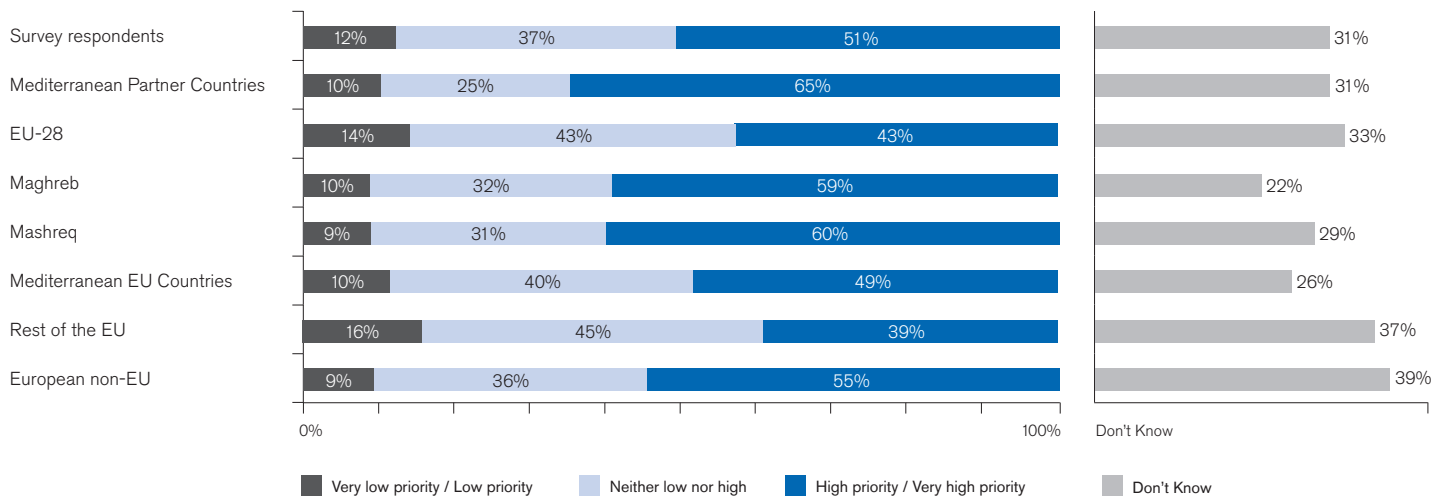
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: THE EURO-MEDITERRANEAN SUSTAINABLE URBAN DEVELOPMENT STRATEGY**



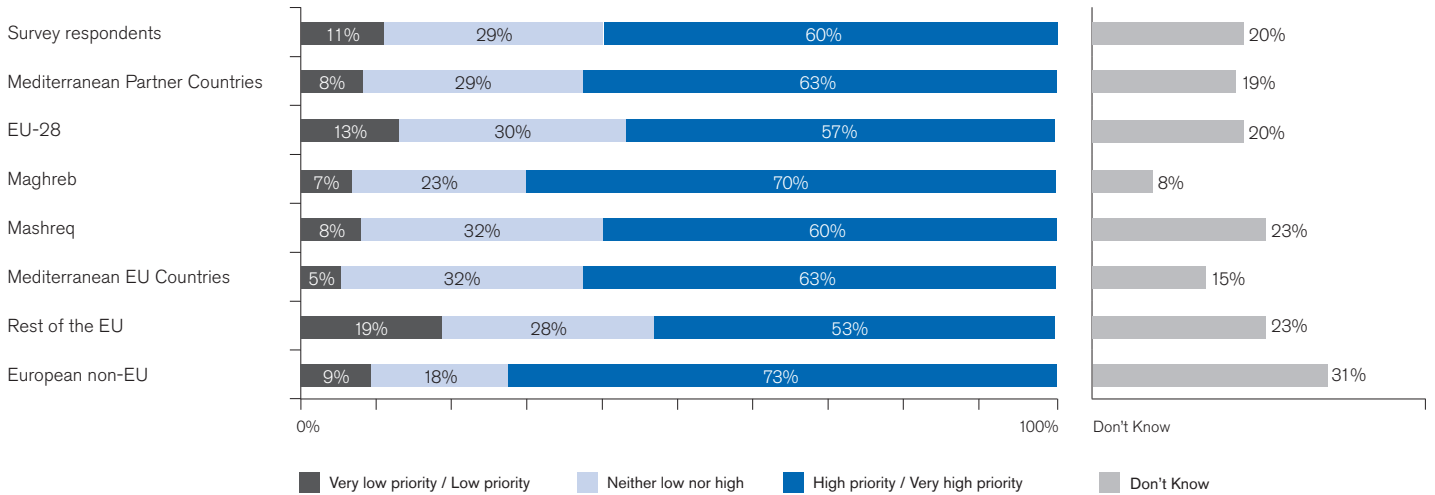
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: LOGISMED TRAINING ACTIVITIES**



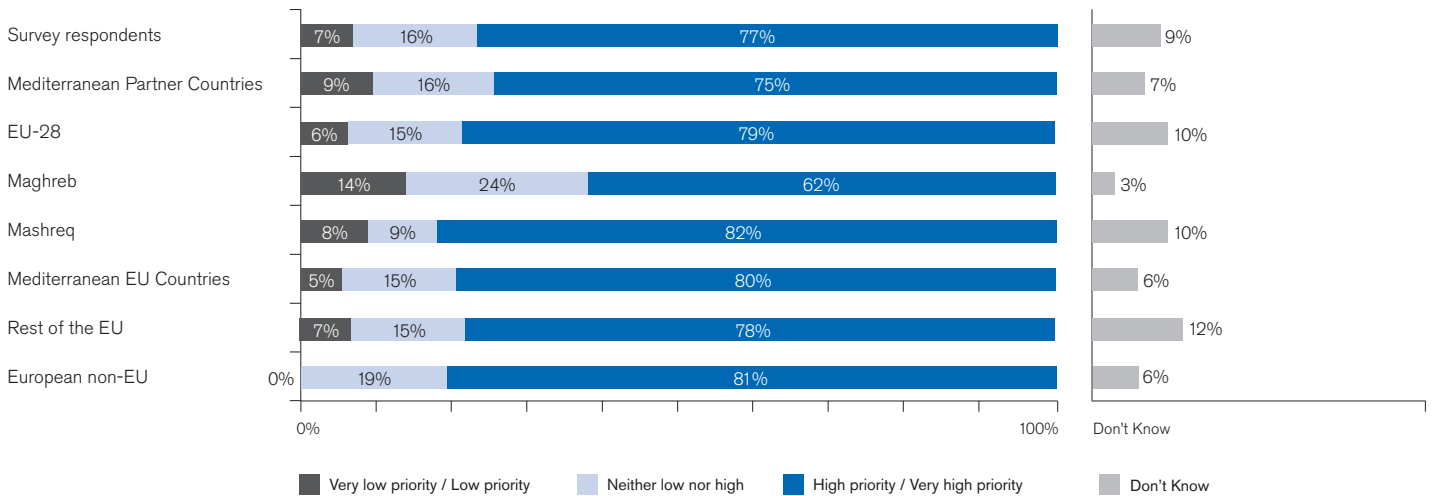
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: COMPLETION OF THE CENTRAL SECTION OF THE TRANS-MAGHREB MOTORWAY AXIS**



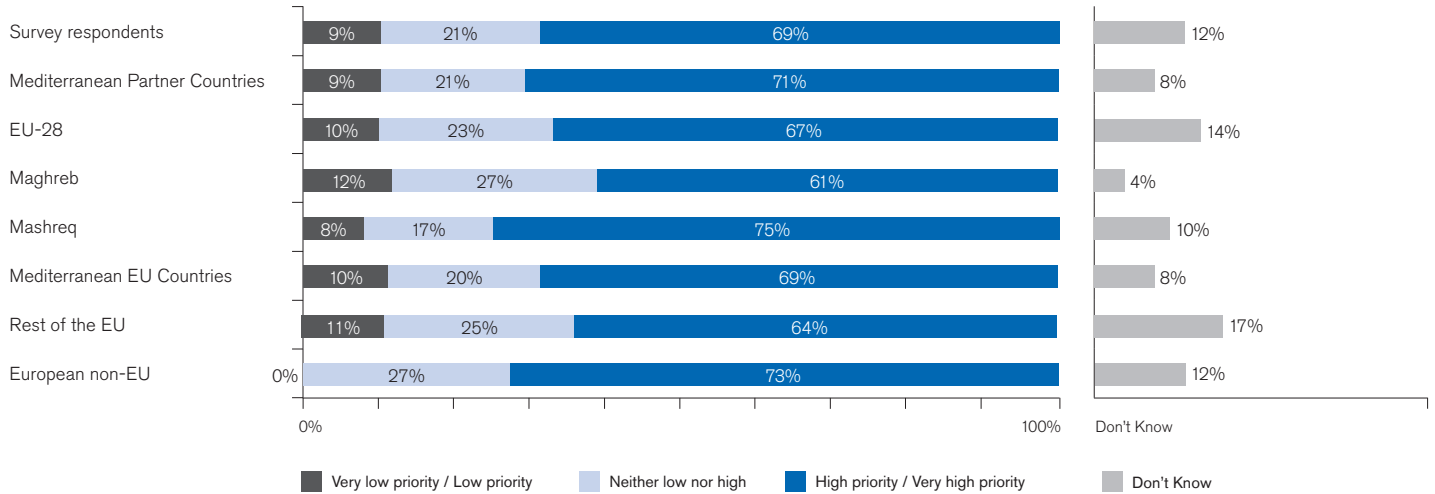
**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: MEDITERRANEAN INITIATIVE FOR JOBS**



**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: EURO-MEDITERRANEAN DEVELOPMENT CENTRE FOR ENTERPRISES**



**D4. What degree of priority do you attribute to the following projects of the Union for the Mediterranean?**

**Degree of priority attributed to the following projects of the Union for the Mediterranean: MEDITERRANEAN SOLAR PLAN**

