

Euromed Survey 2012: Rethinking Policies for a Changed Mediterranean

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This fourth and last edition of the Euromed Survey has been conducted within a totally renewed regional context. Today's political and social situation, at the outset of this multiannual programme of surveys, was not contemplated by any of the Mediterranean's actors or experts. Consequently, the kind of issues and themes dealt with in the survey have been adapted to this changing reality with the aim of being able to fully capture the impact these have on Euro-Mediterranean cooperation.

The fieldwork was carried out between early January and early March 2013, when the governments that arose from the Arab revolutions or from the political reform processes had already been managing these countries for several months. The impact of their actions was therefore reflected in the survey questions. The 843 experts and actors that answered the survey were given a questionnaire organised into six different blocks. This article presents a brief summary of the main results. A more complete and exhaustive analysis of the survey can be found in the fourth report on the Euromed Survey. (www.iemed.org/euromedsurvey).

Main Findings

One of the principal elements of the findings is that it presents an ambivalent situation, which, despite the

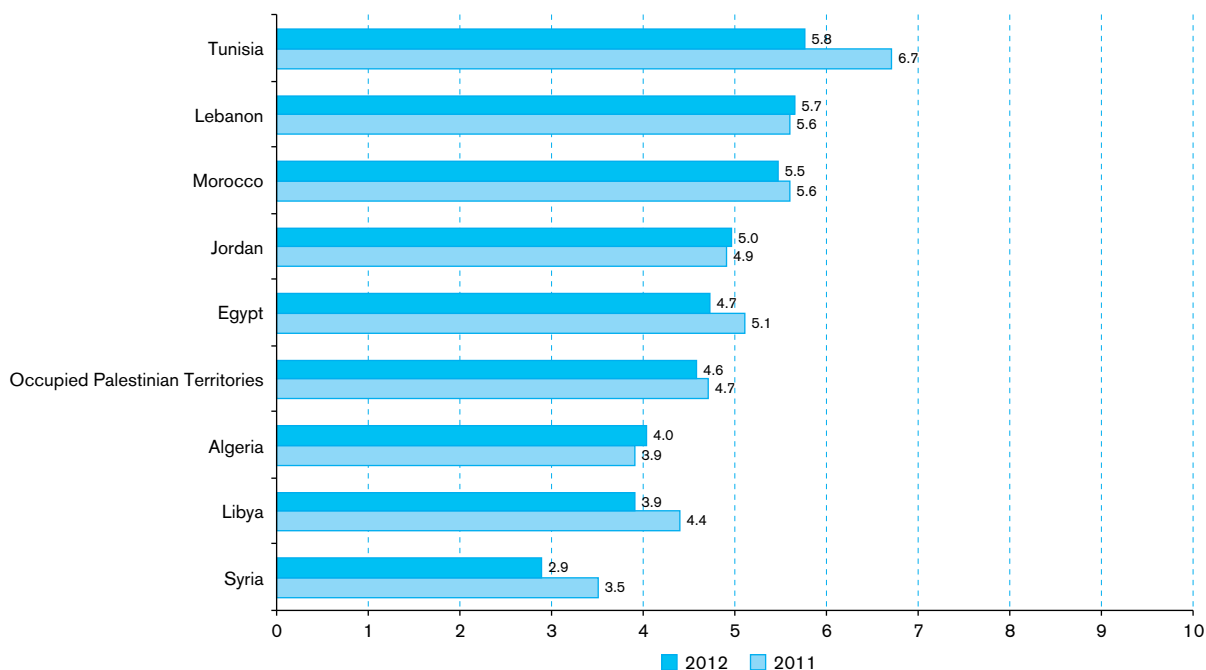
difficult evolution of Euro-Mediterranean cooperation, both due to the difficulties of its institutional setting, and the changes in the region (revolutions, transitions, new governments, wars), suggests that it is still a valid initiative with recognised potential.

The answers provided by experts and actors from the region therefore show that:

- The European Union has a strong capacity to have greater impact than other external and regional actors in the region.
- There is still room for Euro-Mediterranean policies to have positive impacts on cooperation, strategic economic options, commercial partnerships and strengthening democracy and good governance.
- After 4 years, the Euro-Mediterranean cooperation is still considered a valid instrument for facing important challenges in the region.

Prospects of Sustainable Democracy and New Actors

Regarding the question on the probability of a solid and stable democracy in the Mediterranean Partner Countries (MPCs), the results show that there are three defined country groups. Firstly, Tunisia, Lebanon and Morocco are considered most likely to enjoy a solid and stable democracy. Secondly, the results for Egypt, Jordan and Palestine do not clearly show whether or not these countries will advance towards a more solid democracy. Thirdly, Algeria and Libya are considered unlikely countries for a stable democracy. Lastly, separate mention should be given to Syria, whose hopes for a stable democracy are far below those of the last group of countries, due to the current conflict there.



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

In comparison with the results of the previous survey (see Chart 7) it should be highlighted that the respondents' perception of each country has worsened, or, in the best of cases, has remained the same, showing a certain discontent regarding the development of the political situation.

Secondly, the survey asked about the future role of the main Islamist parties, the Salafist parties and the non-Islamist parties. The overall results indicate that the Islamist parties would adopt the most prominent role, followed closely by the non-Islamist parties, while the future role of the Salafist parties would be the least important.

In reference to each of the countries the answers varied considerably (see Chart 8). In countries like Lebanon or Algeria the surveys consider that the non-Islamist parties will play a more important role than the Islamist parties, while in countries like Egypt, Tunisia, Turkey, Libya, Palestine or Syria the traditional Islamists are given greater importance than the non-Islamists. In other countries like Morocco or Jordan, both kinds of party are similarly valued. The Salafist parties, however, are only considered actors with a moderate future role in countries like Egypt, Tunisia, Syria or Libya.

However, EU respondents attach more importance to the role of Islamist and Salafist parties than do re-

spondents from the MPCs. In these countries, Islamist and non-Islamist parties appear to enjoy almost equal importance.

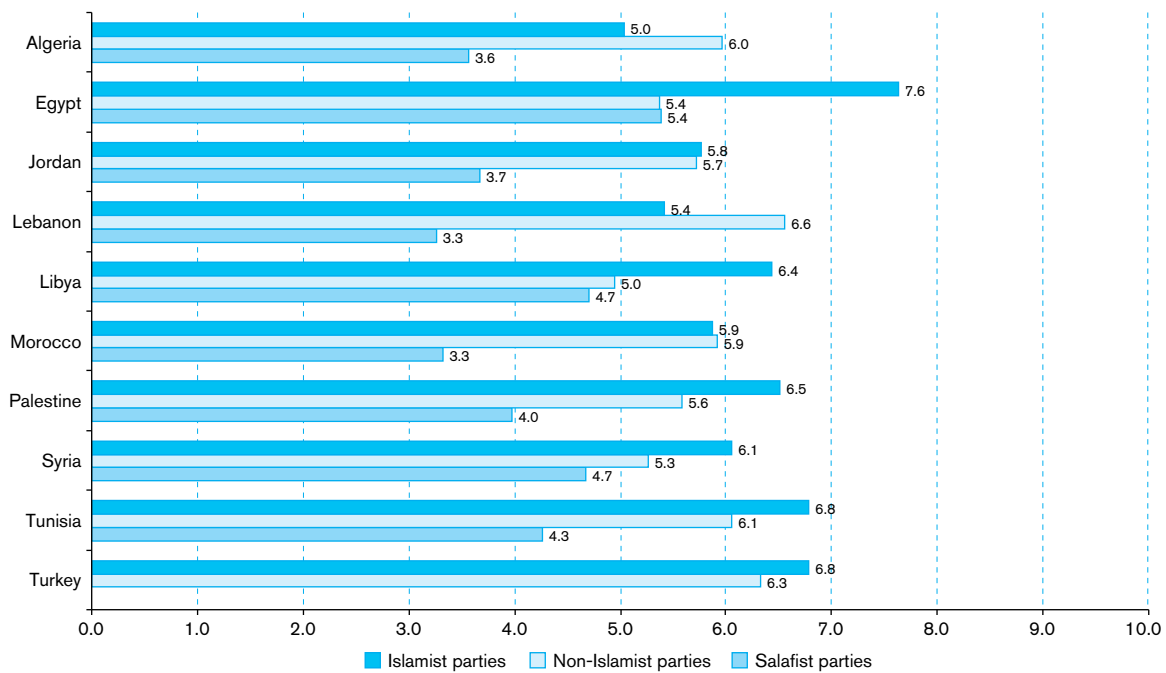
When asked to prioritise democracy benchmarks, free and fair elections are the first choice of respondents, while a second important priority relates to civil freedoms. The independence of the judiciary has almost the same level of priority as the democratic control of the army.

Although there are important institutional and political changes, no major changes are foreseen in the region's foreign policy as a consequence of the Arab Spring. However, it should be mentioned that Egypt is thought to maintain its role as an essential broker in the region and, according to respondents, as regards foreign affairs policies, pragmatism will assume greater importance than ideologies.

Towards a Multipolar Neighbourhood

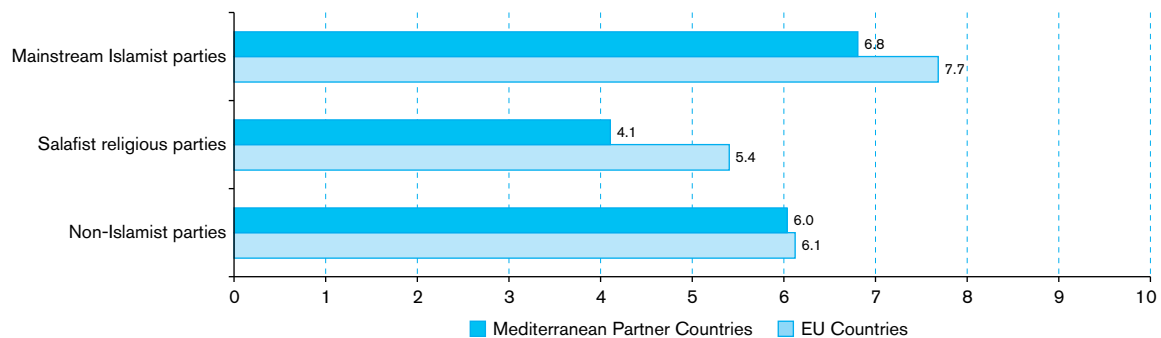
The second block of questions is focused on the role that the European Union will have to face with the development of a multipolar neighbourhood, that is to say, the influence that it could continue to have on the SMCs, after the region's political changes.

CHART 8

Role of Mainstream Islamist Parties in the Future Mediterranean Landscape (average on a scale of 0= negligible role 10= key role)


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

CHART 9

Role of Parties in the Future Mediterranean Landscape (average on a scale of 0= negligible role 10= key role)


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

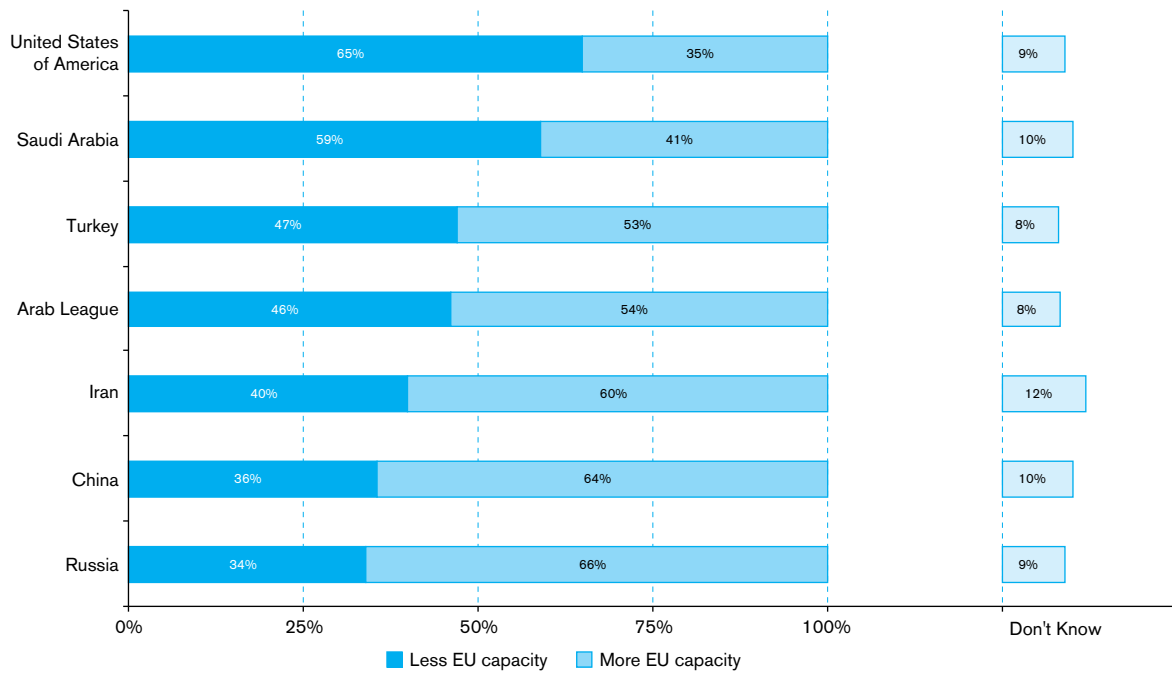
According to the respondents, the EU still maintains a strong capacity to have more impact than other external and regional actors in the region. The US and Saudi Arabia, however, are considered to be more influential (see Chart 10)

The survey also examines the EU's role in the domestic developments of the MPCs; a question also asked in 2011, thereby allowing us to compare responses given when the impacts of the Arab Spring were still recent, with a situation, such as that of late 2012, when democratising processes were more uncertain.

Responses follow the same trend as in 2011; that is, the prevalent scenario among the responses obtained for each one of the MPCs is to "remain cautious and work on the basis of demands emanating from the MPCs," a majority option for all countries except the Occupied Palestinian Territories and Syria.

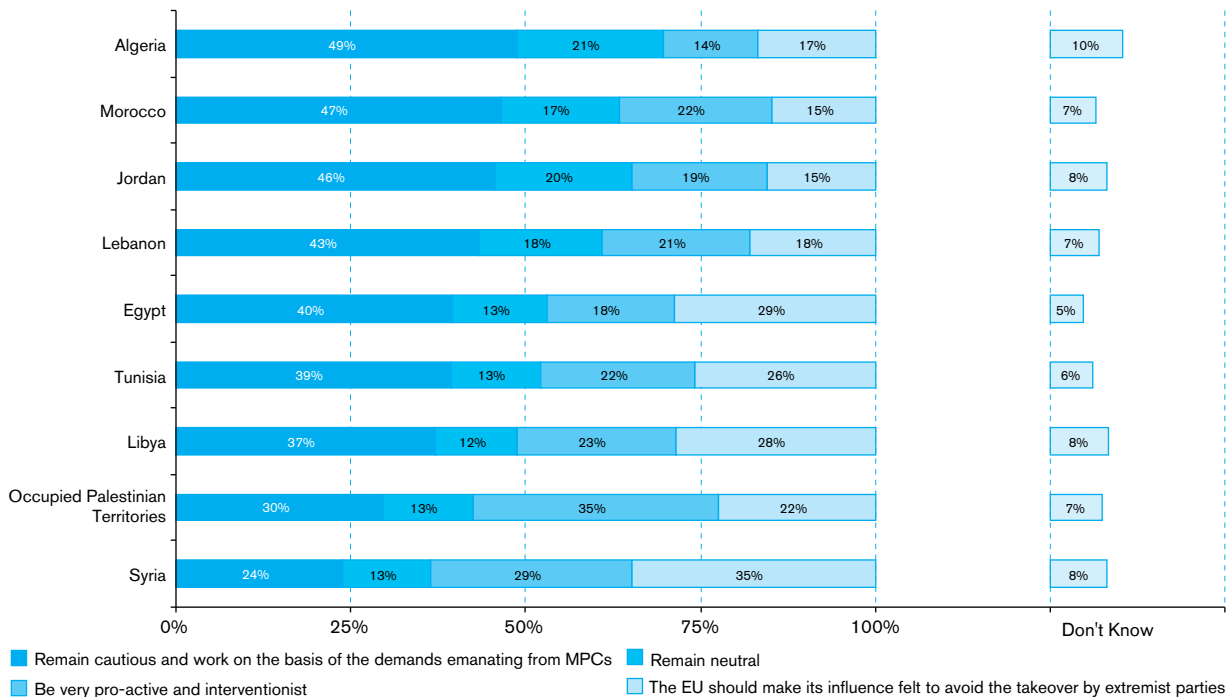
In the case of the Occupied Palestinian Territories, the most notable option, as in 2011, is that which sees the EU as having a more pro-active and interventionist role. In the case of Syria, responses have evolved from seeing this pro-active role as the most

CHART 10 Assessing the EU's Future Role in MPCs Compared to Other External and Regional Actors (the Chart 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 the 4th Euromed Survey.

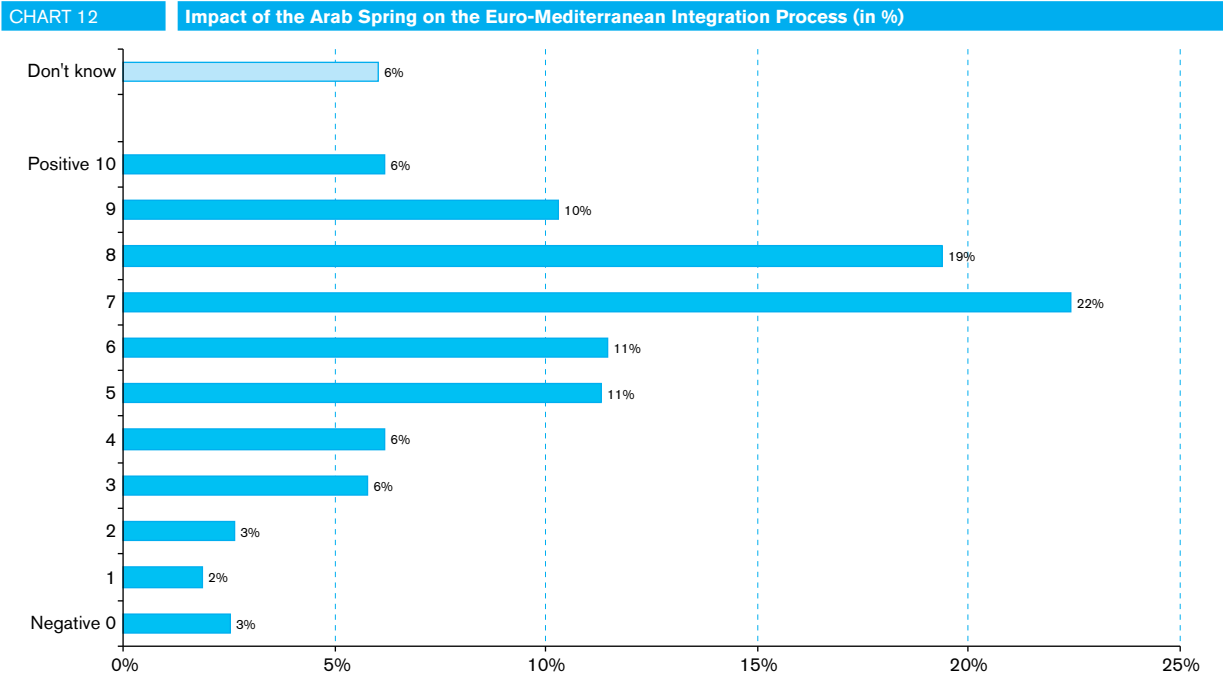
CHART 11 Assessment of the EU's Role with Regard to Domestic Developments in the Mediterranean Partner Countries



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

notable option, to the view that “the EU should make its influence felt to avoid the takeover of extremist parties.”

According to the survey, the influence of the EU in these countries is focused mainly on commercial and economic issues and to a lesser extent on promoting



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

regional integration and political reforms, while its influence as an agent of peace is very limited. The final question of the block was based on the Syrian conflict and asked about the main international actors that could be the key to the conflict's final resolution. According to the respondents, Turkey and the US, and then Saudi Arabia and Iran will be the key actors in resolving this situation, significantly ahead of the United Nations or the EU.

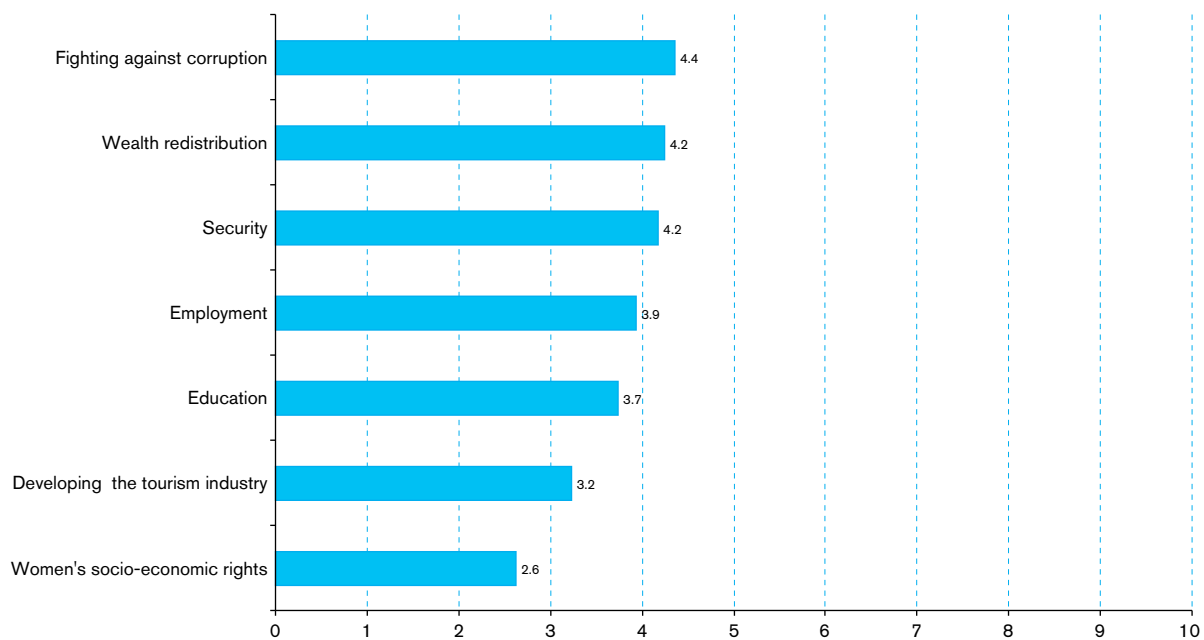
Euromed Region

The third block of the survey deals with questions related with the Euro-Mediterranean integration process and seeks to monitor and assess the regional policies and programmes developed during 2012. On the one hand, the impact of the Arab uprisings on the Euro-Mediterranean integration process has an average assessment of 6.4 on a scale from 0 to 10, where 0 stands for negative impact and 10 positive impact. It is notable that 50% of respondents gave a score of 7 and 9, thus assessing it very positively. By country groups, the balance of the average Survey assessment is maintained. On the mid and long-term role of the Union for the Mediterranean (UfM), the Survey average is around 5.

The percentage of responses around the middle grades (4 to 6) accounts for 50% of responses. In terms of responses by country groups, there is a balance around the Survey average. However, it should be noted that Maghreb and Mediterranean EU countries are slightly above the average, as European non-EU countries give a notably high assessment to the key role of the UfM in the region (6.7).

Respondents show a clear preference for strengthening the role of civil society as a key element of democratic reform and public accountability in MPCs

When classifying the priorities of the Communication of the European Commission and the High Representative on: "A New Response to a Changing Neighbourhood," (Money, Market, and Mobility), market access is seen as the first priority, especially for respondents from the EU while for those from the MPCs the three options presented very similar values. Among the cooperation instruments proposed in the Communication of the European Commission



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

and the High Representative “A Partnership for Democracy and Shared Prosperity with the Southern Mediterranean,” respondents show a clear preference for strengthening the role of civil society as a key element of democratic reform and public accountability in MPCs. This is especially the case for respondents from the MPCs, while concluding the neighbourhood agreements is the priority for respondents from the EU.

Lastly, the visibility and impact of the EU's action towards MPCs receives an average grade of 5 for most respondents, with a slight tendency to consider the impact of the EU's work in the region to be greater than its visibility. Clearly above the mean are the respondents of Balkan countries members of the UfM, while respondents of Mashreq countries also show a more positive perception of the EU's impact and visibility in the region.

Economic and Financial Dimension

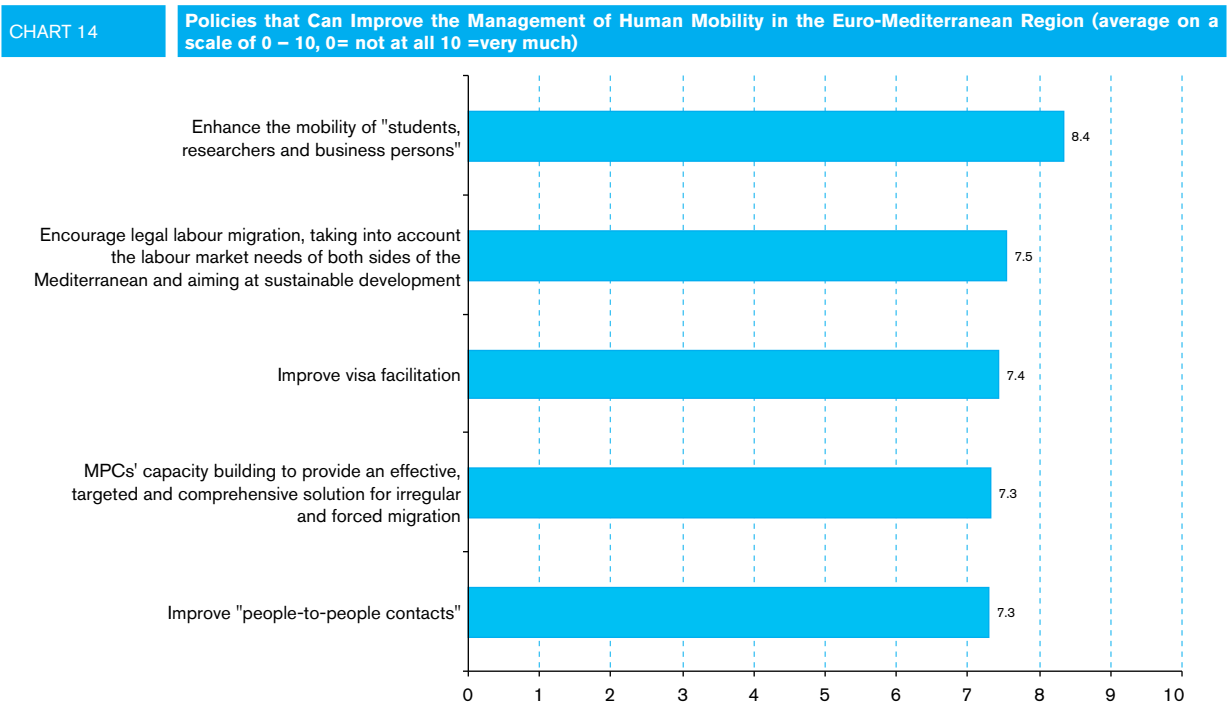
Among the long-term economic strategic priorities of regional governments, participants in the survey consider that MPCs will increase their cooperation with the Gulf Cooperation Council and consolidate

their economic ties with China. Deeper economic relations with the EU will be more relevant than the MPCs' bilateral relations with the United States or their integration in multilateral regional organisations. The following question asked respondents to value the capacity of the Islamist governments in the region in managing socio-economic demands. The responses show a low level of confidence in this regard. Only those questions related to the fight against corruption, wealth distribution and security reach a value nearing 5, while the confidence in the capacity of these governments to respond to issues, like the development of the tourist sector and women's socio-economic rights is negligible.

Lastly, regarding the impact of the Arab Spring on Foreign Direct Investment (FDI) in the MPCs, respondents thought countries like Turkey, Israel or Morocco have benefited most as they have seen their FDI increase, while Egypt or Syria have seen their capacity to attract FDI slightly lowered.

Defining Priorities

During the previous editions of the Survey, a block of questions was dedicated to monitoring and assess-



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

ing policies and programmes developed at the Euro-Mediterranean level.

This Euromed Survey identifies the priorities of Euro-Mediterranean cooperation in the fields of migration and mobility, employment, youth and women.

On human mobility in the Euro-Mediterranean region, the survey asked about the capacity of certain policies to improve human movements in the region. The policy seen as the most appropriate to improve human movements in the region is the enhancement of the mobility of students, researchers and business people, scoring an average of 8.5. The remaining policies are graded around 7.3 and 7.5 (see Chart 14).

It is notable that the results are highly homogenous if compared to the averages by groups of countries, with the Maghreb and Mashreq countries making a consistently positive assessment with minor differences, while the assessment by EU Mediterranean countries and remaining EU countries is lower.

Strong education policies are an essential tool for women's empowerment, while investment in human capital through education and training is the key policy for increasing employability in the region. Additionally, youth policies must encourage young citizens to participate in civil society and democratic institutions.

Prospective and Policy Recommendations

The last block of the Survey is composed of two questions referred to as prospective issues regarding Euro-Mediterranean cooperation and assessing the probability of specific hypotheses for the future. It is important to highlight that the results show that Euro-Mediterranean cooperation is still a valid instrument for dealing with some of the most pressing challenges in the region, including the strengthening of democracy in MPCs, enhancing human exchanges and promoting democracy and respect for human rights.

The question that focuses on the effect of Euro-Mediterranean cooperation in the long term assesses the probability that Euro-Mediterranean cooperation would lead to a series of scenarios. Of the six scenarios proposed the most likely for respondents (although with a relatively low probability [6.0 and 5.9 on average]) are the achievement of greater understanding and respect between cultures and religions in the region or the increase of human exchanges between the two shores. These elements are followed in probability by the strengthening of democracy and respect for human rights in the MPCs and the improvement in living conditions in



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

the MPCs. Finally, the two options considered most unlikely are the reduction of the development gap between the North and South of the Mediterranean and the capacity of Euro-Mediterranean cooperation to resolve conflicts in the region.

Euro-Mediterranean cooperation is still a valid instrument for dealing with some of the most pressing challenges in the region, including the strengthening of democracy in MPCs

Finally, participants in the Survey remain sceptical about the role of Euro-Mediterranean cooperation in bringing the conflicts in the region to an end and the reduction of the development gap between the two shores of the Mediterranean.

The last question of the Survey allows respondents to assess the probability of a series (14) of hypotheses arising for the mid and long-term future. These hypotheses include some of a marked pessimistic nature and others that are more optimistic.

The hypotheses considered most probable by the respondents are precisely those that are of a marked pessimistic nature, which include those that consider that water scarcity in the region will be a source of conflict, that xenophobia will increase in Europe, that clandestine immigration will increase or that social tensions caused by pressures linked to demographics and the employment market, etc. will increase. On the other hand, there are hypotheses that could be considered more optimistic, which include the North-South economic convergence, the emergence of the Mediterranean identity or the increase of women's participation. These are considered to be less probable.

In conclusion, the results of the survey reveal some of the keys that determine the region's present and future. Despite the political transformations on the southern shore of the Mediterranean (unimaginable five years ago when the IEMed began this programme), there are still many difficulties that the region must deal with. Although the perception of the future is slightly pessimistic, the results show which elements should be taken into consideration with respect to the construction of a Euro-Mediterranean area of shared security and prosperity.