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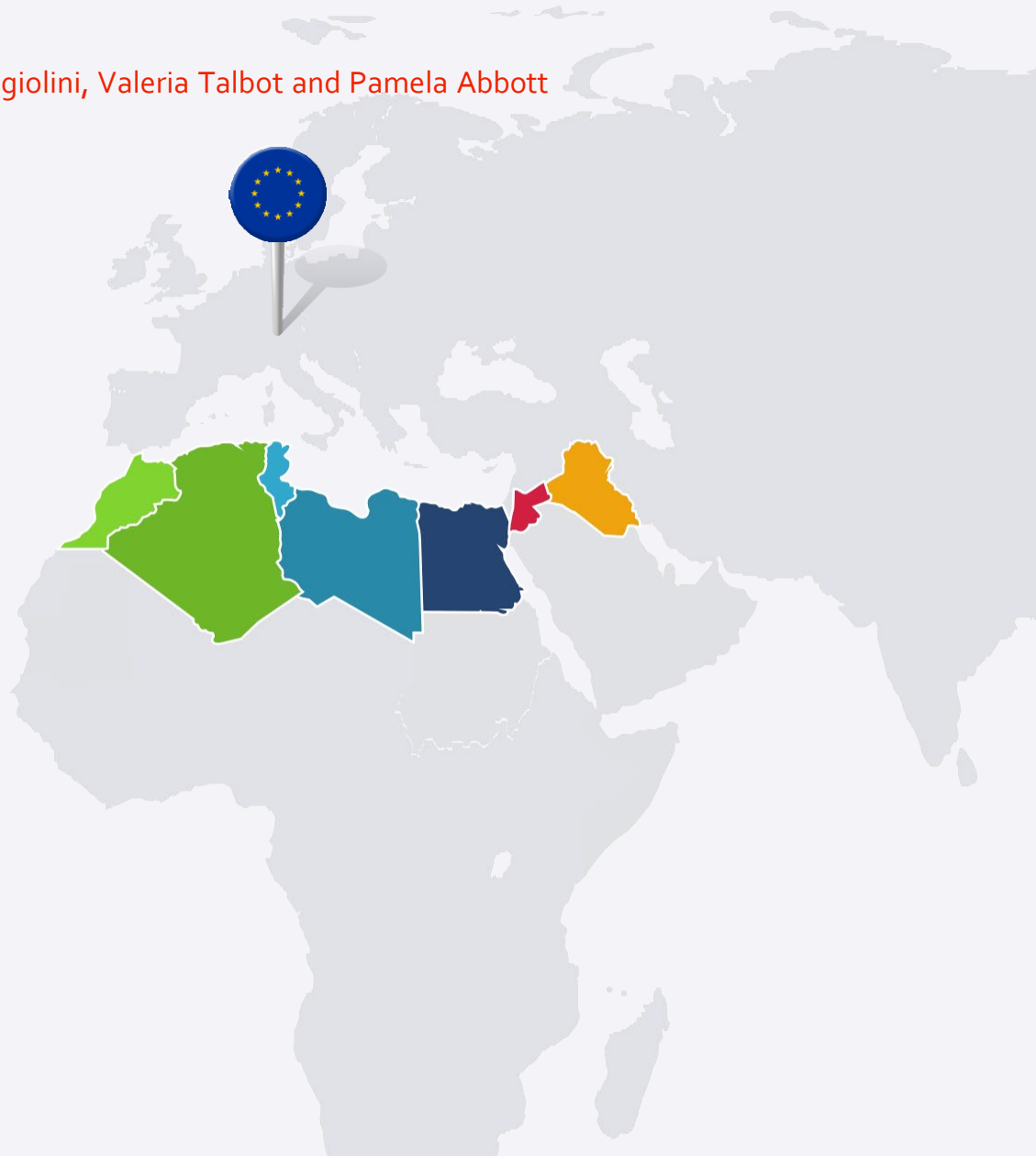
# The Arab Transformations WORKING PAPER SERIES

NUMBER 9

MENA Population's Perceptions of Key Challenges, International  
Context and the Role of the European Union

Authors:

Andrea Teti, Paolo Maggiolini, Valeria Talbot and Pamela Abbott



UNIVERSITY  
OF ABERDEEN



ArabTrans



SEVENTH FRAMEWORK  
PROGRAMME



The project received funding  
from the European Union's  
Seventh Framework  
Programme under grant

The Arab Transformations Project is an international research project operating within the European Commission's FP7 framework. The project looks comparatively at attitudes and behaviours in the context of the social, political and economic transformations taking place across Middle East and North Africa since February 2011. The countries covered are Morocco, Algeria, Tunisia, Libya, Egypt, Jordan, and Iraq. The survey on which this report was based was carried out between May 25<sup>th</sup> and August 31<sup>st</sup> 2014.

Ethical approval for the Project was given through the Ethical Review Procedures of the University of Aberdeen.

Further details of the project including the Survey Technical Report and the Longitudinal Data Base and Guide can be found on the project web site at [www.arabtrans.eu](http://www.arabtrans.eu).

### **Acknowledgements**

The Survey on which this report draws was carried out as part of the Arab Transformations Research Project funded by the EU under Grant #320214.

The Authors gratefully acknowledge the support provided by Cristian Luguzan for this report. The Arab Transformations Project is coordinated by the University of Aberdeen (UK) and includes further 11 partners: Dublin City University (DCU), Dublin, Ireland; Análisis Sociológicos Económicos y Políticos (ASEP), Madrid, Spain; Istituto per gli Studi di Politica Internazionale (ISPI), Milan, Italy; Universität Graz (UNI GRAZ), Graz, Austria; Societatea Pentru Metodologia Sondajelor Concluzia-Prim (Concluzia), Chisinau, Moldova; Centre de Recherche en Économie Appliquée pour le Développement (CREAD), Algiers, Algeria; Egyptian Centre for Public Opinion Research (BASEERA); Cairo, Egypt; Independent Institute for Administration and Civil Society Studies (IIACSS), Amman, Jordan; University of Jordan (JU), Amman, Jordan; MEDA Solutions (MEDAS), Casablanca, Morocco; Association Forum Des Sciences Sociales Appliquées (ASSF); Tunis, Tunisia.

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ISSN: 2398-9106

DOI: [10.13140/RG.2.2.29090.84167](https://doi.org/10.13140/RG.2.2.29090.84167)

### **Recommended form of citation**

Teti, A., Maggiolini, P., Talbot, V. and Abbot, P. (2017). MENA Populations' Perceptions of Key Challenges, International Context, and Role of the European Union. Arab Transformations working Paper 9. Aberdeen: University of Aberdeen.

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# MENA Populations' Perceptions of Key Challenges, International Context, and Role of the European Union

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## Abstract:

Survey data from the ArabTrans 2014 survey contains a unique battery of questions pertaining to the perception of the European Union. This report builds on those questions to analyse perceptions of the EU, its development cooperation programmes, its promotion of democracy, the appropriateness of its response to the Arab Uprisings, and the perception of the EU as an international actor. Overall, the data suggests low levels of awareness and relatively negative opinions of the EU's actions both in general and in the specific context of its response to the Arab Uprisings. However, respondents' preferences also suggest avenues for policy development for the Union such that it might simultaneously achieve its interests and meet the demands of MENA populations. Throughout, the paper also takes note of specific patterns and conditions found in individual countries which present particular challenges for the EU.

## Key Words:

European Union, EU, Middle East, Arab Uprisings, survey research, Egypt, Tunisia, Jordan, Morocco.



## 1. Introduction

This report examines the results of the ArabTrans 2014 survey relating to Euro-Mediterranean relations, building its analysis on a unique battery of questions asked in this survey but absent from its counterparts, including the ArabBarometer, AfroBarometer, and the World Values Survey. The questions drawn on here are selected in order to infer the perceptions by respondents of the key planks of the EU's Neighbourhood policy – democracy assistance, civil society support, development assistance, and security – from the perspective of recipient societies.

Questions are designed to assess respondents' *awareness of* EU policies, their assessment of these policies' *appropriateness of* and *responsiveness to* the Uprisings. In order to interpret these assessments, particularly the appropriateness of the EU's policy response and possibilities of modification, the report draws on questions pertaining to respondents' positions on the goals and instruments of policy they view as appropriate and pressing for their countries generally and their perception of the international system in particular.

Section 2 examines respondents' positions on what they believe the EU is doing, what it can do, and what it should do. Section 3 examines respondents' general perceptions of priorities for their country, their assessment of how well their own governments are meeting those challenges, and of the international environment within those efforts are necessarily located.

## 2. Perceptions of the EU: What it Can and Should do

This section analyses data on the perception of the EU and what it *is* doing in surveyed countries, and the perception in respondents of what the EU *ought* to be doing.

### 2.1. Drivers of the Uprisings

The context for the analysis of both popular perceptions and policy preferences, and for assessing the EU's response must be an evaluation of the factors which drove the Uprisings themselves. Current research conducted on both quantitative and qualitative evidence suggests that the bases for the Uprisings were a combination of political and socioeconomic grievances which emerged as a result of the 'neoliberal' economic policies regional governments had been implementing (see Teti & Abbott, 2016a). While a range of socio-economically and politically different groups were involved in the Uprisings, they were all affected in different ways by the retreat of regional regimes from earlier social contracts derived from the nationalist postcolonial era which guaranteed – at least on paper – certain basic socioeconomic rights to working classes and middle classes. As regimes conducted privatization of state assets – which they were encouraged to do by Western governments and IFIs – the public sector rollback was not matched by a commensurate growth in either quantity or quality of private sector job provision. Private sector jobs tended to be

comparatively more poorly paid and precarious, with the net effect of an increase in poverty levels. These trends are reflected in public opinion survey data as well as qualitative fieldwork, in people's perception that they were being treated unfairly, so that it is little wonder that demands for social justice – a fairer society, dignity, and social inclusion – were central to the Uprisings. In the meantime, at a political level, regional regimes and Western counterparts had defended lack of progress – particularly substantive progress – through a gradualist rhetoric (slow, small but supposedly steady steps) which had, however, produced little discernible increase in political voice and inclusion in most cases, but had on the other hand served the purpose of legitimising precisely those economic reforms which produced socio-economic dislocation.

The 2014 ArabTrans public opinion survey found that when asked what motivated the Arab Uprisings protests, respondents gave answers which focused on socio-economic factors (conditions, rights) and on corruption above – on average – political factors (e.g. authoritarianism). These answers must be interpreted not as a 'regional' (culturally- or religiously-induced) preference for authoritarianism, but rather in the context of the quarter century of post-Cold War rhetoric focus on democracy being largely limited to its formal trappings but unable to address the perception of socioeconomic as well as political marginalisation. Thus, while respondents did claim civil-political rights were important, socio-economic rights were also seen as vital. In Egypt and Jordan, three times as many respondents nominated economic demands as did political demands. In Morocco and Tunisia, while differences were smaller, they were still noticeable. In Morocco and Tunisia, corruption was ranked above political factors, and ranked alongside economic in Morocco and Tunisia. Political rights were more frequently nominated in Tunisia, but in Egypt political factors were mentioned by a mere 20%.

### 3. General Assessment

The 2014 ArabTrans survey asks questions pertaining to both EU programmes in general, and to specific programmes, providing data on perceptions of the *content* of those programmes, their *responsiveness* to MENA needs, and the *appropriateness* of those programmes in the eyes of MENA populations.

#### 3.1. Policy Priorities: Most Positive EU Policy – Development, Democracy, Non-Involvement, Gender, and Palestine

In terms of the *content* of EU policies, respondents are asked which EU policy they think is '*most positive*' choosing between promoting democracy, economic development, promoting women's rights, and resolving the AI conflict (see Figure 1 below).

The areas which are clearly **low priorities** for respondents are *women's rights*<sup>1</sup> and – perhaps surprisingly – the *Palestinian/Israeli question*. In no country are women's rights considered the most positive area for EU policy intervention for more than 5% of respondents. For women's rights, the lower support than other options is significant both because the EU has made a commitment to support mainstreaming gender equality in all its policies as well as to support women's rights with specific programmes. It is also significant because of the particular political sensitivity which gender has acquired in the context of the domestic politics of most countries – again, to different degrees and different modalities – as epitomised by the stigmatisation of and attack against women's rights as 'Suzanne's Laws' in post-Mubarak Egypt. The other notably low-scoring option is the Arab-Israeli conflict. Perhaps unhelpfully, while the wording in this question indicates the "Arab-Israeli conflict", other questions elsewhere in the survey mention the "Palestinian Question": while the two are obviously interconnected, they are not precisely the same thing, making the connotation of the questions different enough that note should be taken (for more details, see subsection below).

Conversely, the single **highest priority** across all surveyed countries is *economic development*. Only in Egypt did 'economic development' score lower than another option, in this case that the EU should not get involved at all. It should be noted that Egypt's non-response rate is by far higher than any other country's (22.5%), suggesting the remaining data should be interpreted with caution, as this subset of responses may have failed to capture a significant proportion of public opinion.<sup>2</sup> This emphasis on development might seem paradoxical particularly in Egypt and Tunisia given their achievement of apparently substantial national income per capita growth rates since the late 1990s. However, those growth rates and the reforms (e.g. privatisations) that came with them produced a considerable degree of socio-economic dislocation: neo-liberal reforms failed to deliver decent jobs to absorb the new entrants to the labour market, the reduction in the downsizing of the public sector has not been matched by the creation of jobs in the private sector, and in fact economic growth has been well below the level required to expand the economy and create jobs to absorb the 'youth bulge' (A. Teti and P. Abbott, 2016; Achcar & Goshgarian, n.d.; A Hanieh, 2013; Adam Hanieh, 2015). This likely explains the focus on development: nearly two-thirds of Tunisians thought that the EU could promote development, albeit clearly unhappy with the socio-economic dislocation of earlier reforms. However, even when this policy option was nominated less frequently, it was still the priority for just under half of respondent's in Morocco and Jordan, and by 30 per cent in Egypt. Taken alongside the share of respondents who preferred the EU not get involved at all, these data represent a challenging vote of no confidence in the Union and more importantly an incitement to reform economic policy so that it delivers jobs.

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<sup>1</sup> For a detailed treatment of gender in the ArabTrans survey, see (Abbott, 2016).

<sup>2</sup> For a detailed analysis of the missing values, see (Abbott et al 2016).

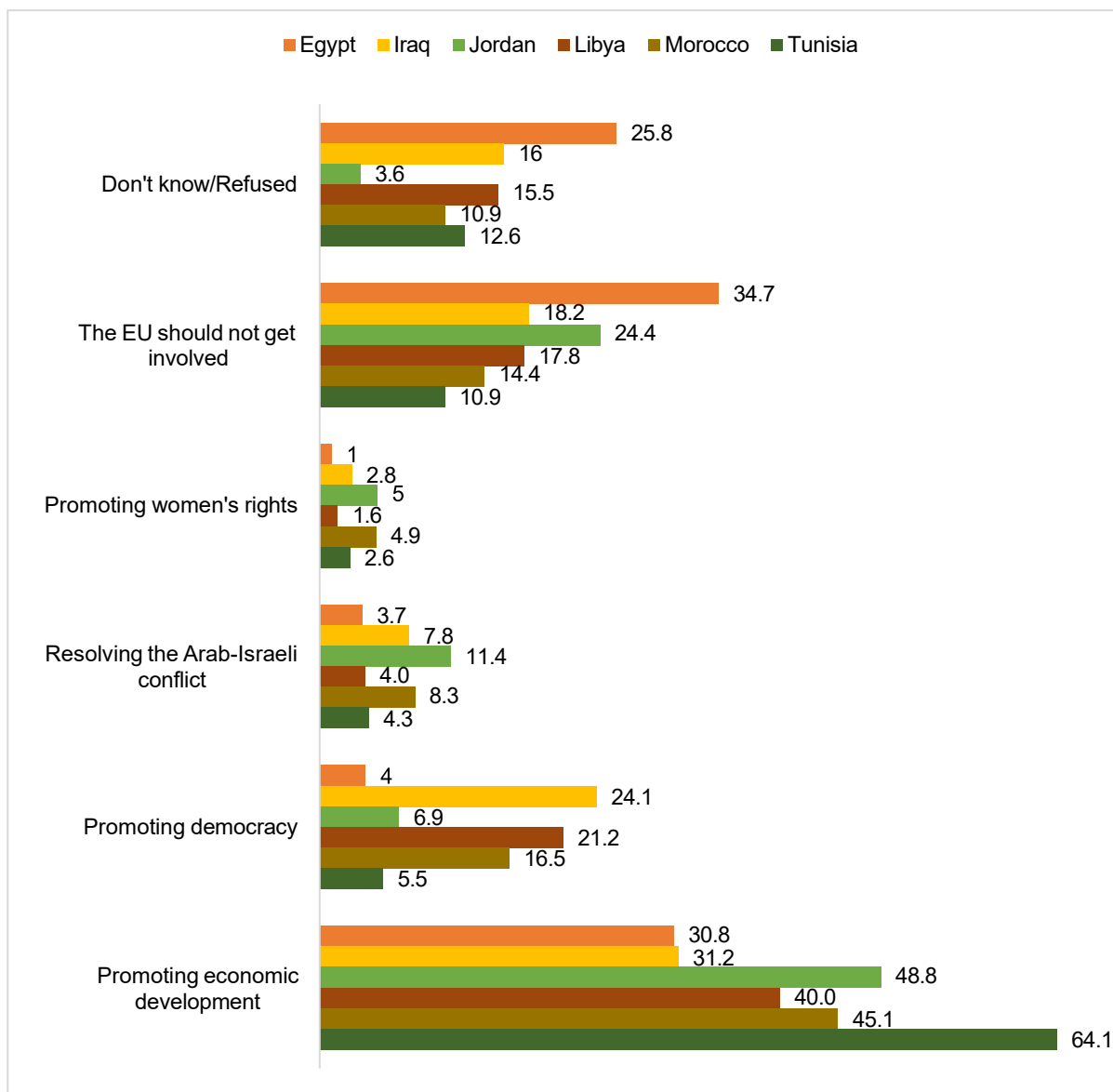
Survey results also suggest that at an **intermediate level** respondents are concerned about the promotion of *democracy* and about *non-involvement*, which score, on average, between the top concern (economic development) and gender and Palestine. A third of Egyptians and a quarter of Jordanians said the EU shouldn't get involved. For Libya and Morocco, these two priorities are roughly equivalent (17.8% and 21.2% respectively for Libya, 14.4% and 16.5% for Morocco). This immediately raises the question of whether among MENA respondents there is a 'demand for democracy' or whether respondents care more about economic conditions than political rights. It may be tempting to suggest that there is a cultural explanation for this apparent discrepancy: however, given responses on other questions such as the desirability and the suitability of democracy or preferences for specific political systems, this ranking is more likely to be the result of past policies pursued towards the region, particularly the Euro-American emphasis on democracy understood as certain institutional designs (e.g. separation of powers) and elections.<sup>3</sup>

It should be noted that for all countries except Jordan (3.6%) and Morocco (10.9%) there are very high **missing values** (don't know/refusal) suggesting results may be unreliable. It should also be noted that a question about security – which is nearly invariably pointed to by respondents as one of the 'main challenges' for their countries – was not asked. However, the magnitude of the difference between the top policy priority across all countries – economic development – and any other option suggests results ought to be outlined nonetheless. Albeit to differing degrees, respondents consistently identified the promotion of economic development as the 'most positive' policy priority the EU could set itself for the region. No other policy area scored as highly in any country, and only in Egypt was development surpassed by a preference that the EU not get involved at all. In Egypt, development received 30.8% of preferences, with democracy – the next highest scoring policy except for non-involvement – at a mere 4%.

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<sup>3</sup> It should also be noted that 'don't know' here is a legitimate answer, suggesting that there may be a more or less substantial portion of public opinion that remains to be persuaded one way or another.

**Figure 1: Most Positive Policy the EU could pursue in your Country (%)**



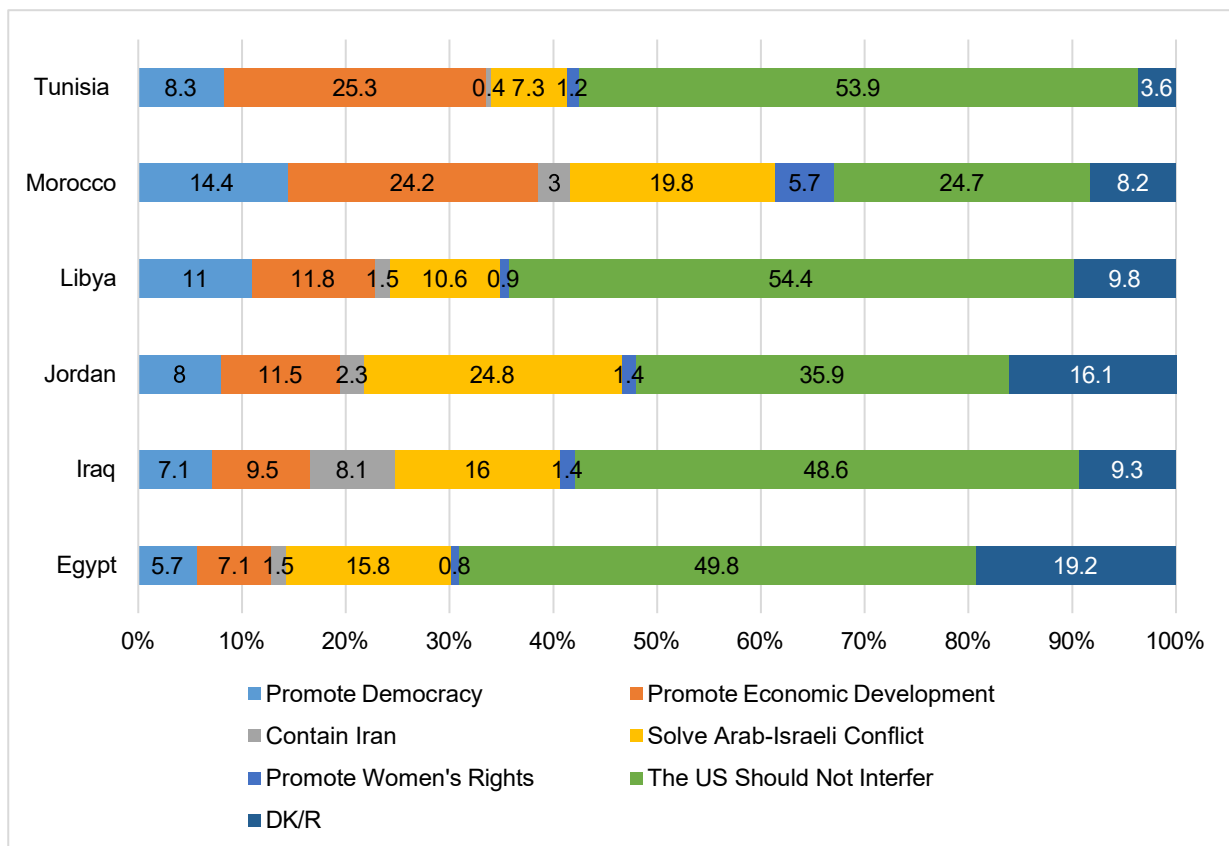
Source: ArabTrans 2014. Note: Respondents were asked to select one option from a list of Democracy, Economic Development, Resolving Arab-Israel Conflict, Women's Rights. NB: no option was presented for 'security'.

Although the questions are not identical, it is interesting to contrast respondents' views of what the EU should do with what respondents to the ArabBarometer III survey think the US ought to promote.<sup>4</sup> Respondents to the latter indicate the US should focus more on the Arab-Israeli conflict (i.e. on the Palestinian question) while ArabTrans respondents on the EU indicate a comparatively greater preference for more involvement of the EU in promoting democracy. In both cases, the promotion of women's rights is vanishingly low, with only Jordan and Morocco approaching 5% in the ArabTrans survey, while in ArabBarometer Jordanians'

<sup>4</sup> Note difference in wording of questions in the two surveys: ArabBarometer asks about policy to promote in *region* while ArabTrans asks about policy in *country*.

preference drops to 1.4%.<sup>5</sup> However, it would be facile to conclude that it is patriarchal values in the abstract which are responsible for such low priorities: it is important to acknowledge that the continued existence of 'traditional' patriarchal values itself requires mechanisms through which those values can be sustained and reproduced, and that the EU's promotion of women's rights *in combination and through* support to local autocracies, often weakens that advocacy and generates backlash against both EU and women's rights. It should be noted that on questions directly about women's rights, respondents tend to be considerably more positive.

**Figure 2: Most Positive Policy US can promote in the Region, % Respondents**



Source: Arab Barometer III.

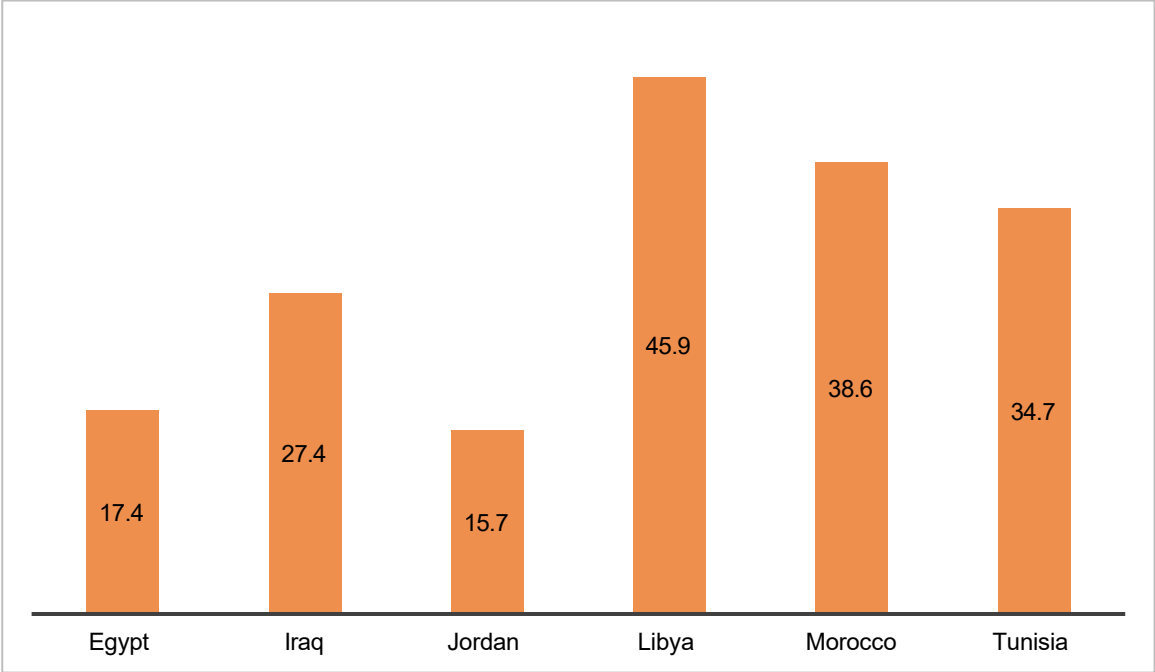
### The Palestinian Question

It should be noted that when respondents are asked about Israel specifically, they are in no sense reconciled to Israel's presence. Nonetheless, the ranking displayed in the question about respondents' perception of the two most positive policies the EU could pursue – which echoes that found in questions about the two most important challenges facing a respondent's country – is significant: for one, it suggests that MENA regimes *may* be overestimating or overstating the degree to which progress towards inclusive democracy *in their countries* is conditional on the resolution of the Palestinian question. That being said, when asked to say

<sup>5</sup> Although note that the ArabBarometer questionnaire asks for respondents' single top priority, whereas the ArabTrans questionnaire allows respondents two choices.

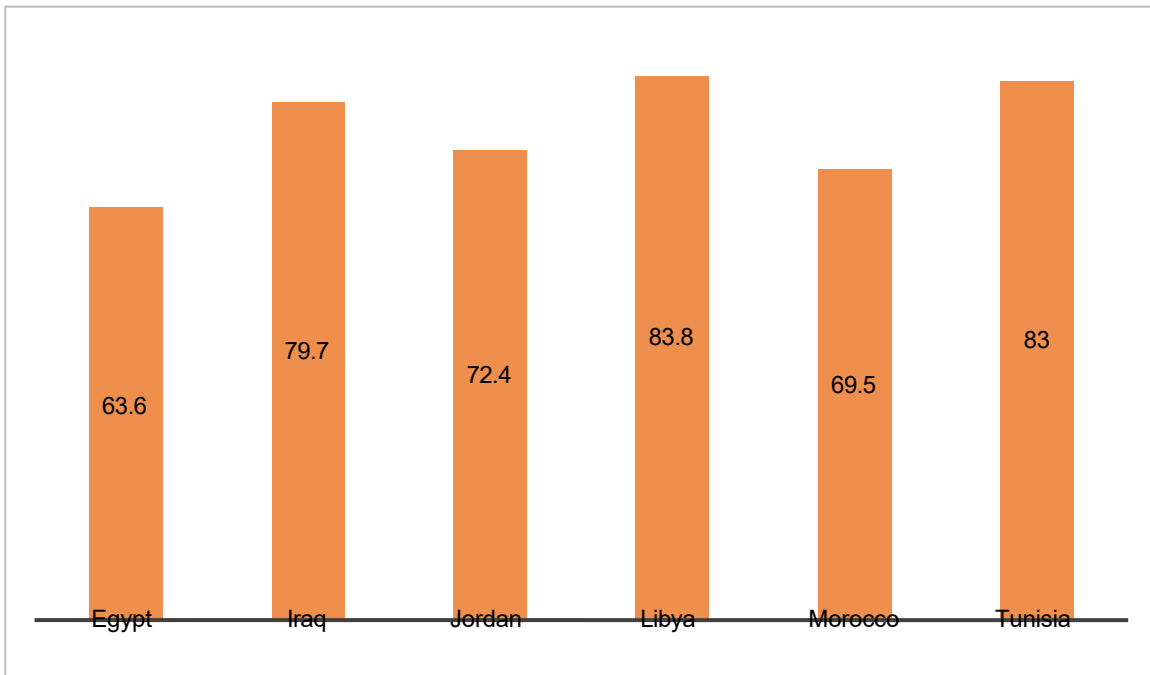
whether specific countries were contributing to stability or instability, Israel ranked highest along with Iran in being perceived as destabilising. It should also be mentioned that Jordanians are the least likely to think that it is not a barrier while the Libyans, Tunisians and Egyptians are the least likely to think resolving the conflict is the most positive policy the EU could pursue.

**Figure 3: Percentage of respondents who do not think that the Arab Israeli Conflict is an Obstacle to Reform in Respondents Country**



Source: ArabBarometer III.

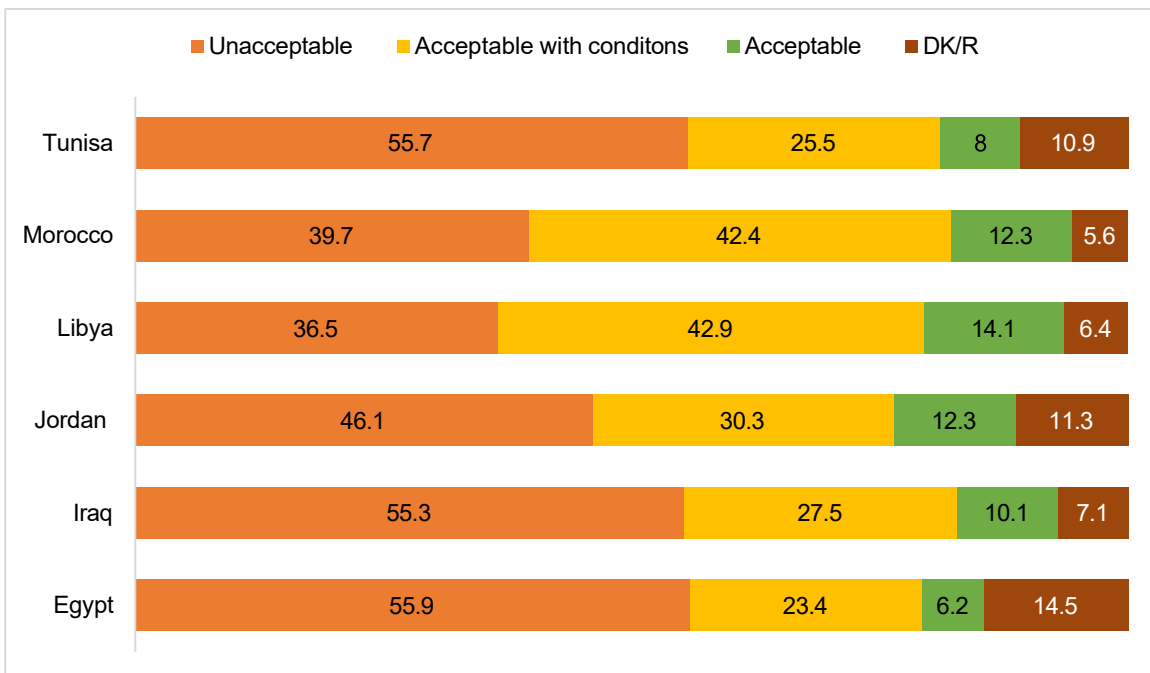
**Figure 4: Percentage of respondents who think the Arab World should accept the existence of Israel as a Jewish state in the middle East**



Source: ArabBarometer III

There is also the issue of policy as opposed to development support – they overlap but there is clear evidence of dislike of interference in policy as opposed to providing development support.

AB has a question on extent to which external demands for reform are acceptable





### 3.2. EU Programmes: Awareness and Impact Evaluation

The ArabTrans survey asks whether respondents have *heard of* EU development / co-operation programmes with their countries, and asks them to *rate the impact* of those programmes they have heard of. It is important to note that the survey does not allow respondents to indicate *which* programmes they have heard of, so these questions do not permit an evaluation of specific EU programmes.

#### *Awareness*

The ArabTrans survey revealed that knowledge on the development and cooperation programs financially supported and/or implemented by the EU is not at all widespread in Arab countries. It is immediately striking just how few respondents had heard of European programmes at all: only 5% of respondents in Egypt, 17% in Tunisia, 22% in Jordan, and 45% in Morocco said they had heard of development cooperation programmes (Figure 2). Nowhere had a majority of respondents heard of such programmes, and aside from Morocco, the highest awareness in other countries nowhere surpasses 25% of respondents, and only in Jordan and Libya does it even surpass 20%.

Morocco displays the highest levels of awareness of EU development programmes, which is perhaps not surprising given the extent and quality of its cooperation with the Union. By contrast, Jordan (a similarly longstanding favourite of EU cooperation) and Tunisia (into which considerable EU funding was poured in the aftermath of the country's revolution) display significantly lower levels of awareness (22% and 19% respectively).

Conversely, Egypt appears significant for its low level of awareness: barely 5% of the population having heard of EU development programmes. This score might well be a reflection of the climate of Egypt's domestic politics, in which media and politicians are preponderantly at best sceptical of 'foreign funding' (meaning *Western* funding, as opposed to funding from Gulf countries, for example). Iraq and Libya, two countries riven by internal conflict, both display much higher awareness than Egypt (12.8% and 23.8% respectively).

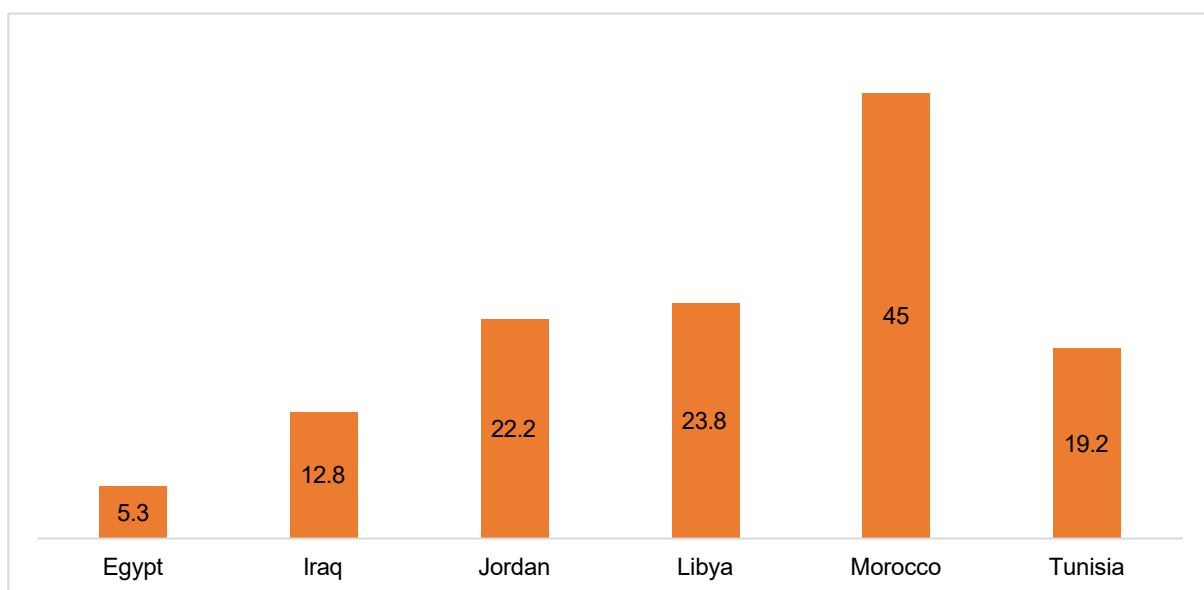
Results in Jordan and especially in Egypt show that, although these countries have been involved in EU initiatives for the Mediterranean since the launch of the Euro-Mediterranean partnership in 1995 and although they are among the more advanced in terms of cooperation with the EU, the action and programs of the EU have not reached a large number of people.<sup>6</sup> It is worth mentioning that Libya and Iraq, which have a much looser degree of cooperation or not structured relations with Brussels, show greater awareness on the EU action in their countries than Egypt that has a longstanding and closer relationship.

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<sup>6</sup> This may be because the EU is a more important development partner in terms of amount of aid given compared to the other countries. The *relative* importance rather than total amount of aid may be a factor (Abbott and Teti 2016).

These results would require deeper reflection from the EU on how to review its policies and instruments towards the Mediterranean countries.<sup>7</sup> However, it does not appear to be the degree of cooperation in a country that determines awareness of the EU, and while further study is needed on this question, it may be reasonable to suppose that the environment into which the EU's investment is directed has a considerable influence on the magnitude of its impact and particularly on public awareness. In contexts like Egypt, for example, public discourse stigmatising primarily Western government support for civil society (e.g. the so-called 'foreign funding' debate) is unlikely to be helpful.

**Figure 5: Respondents having knowledge about Development Cooperation Programs implemented by European Institutions or countries (%)**



Source: Arab Trans, 2014.

### Impact

When asked to evaluate the *impact* of development/cooperation programs, aside from the fact that a majority of respondents have never heard about EU development assistance, it appears that among the Arab countries surveyed, Morocco presents the most positive picture, as 32.2% evaluates EU assistance positively, while 'only' 55% has never heard of these – this being the lowest figure for all six countries. At the other side of the spectrum, is Egypt, where

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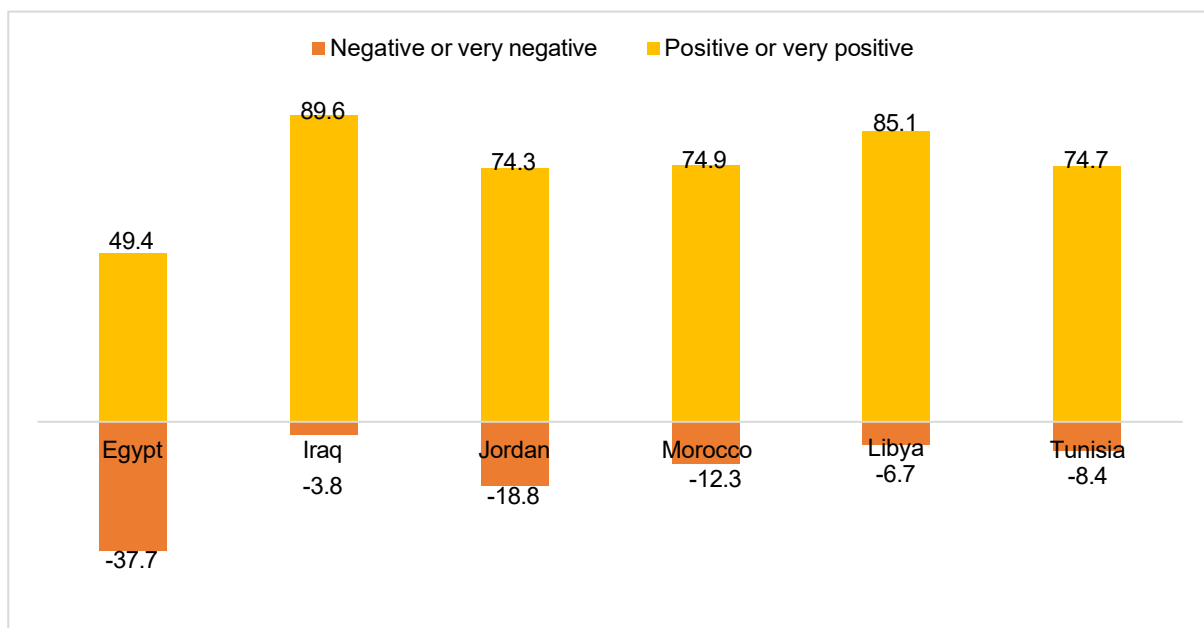
<sup>7</sup> Given that most aid is supplied as budget support – albeit usually for specific sectors – the EU should perhaps review the way it raises its profile as a development provider, and the strategies and instruments for the supply of development aid. An additional difficulty of the current budgetary support model – and of 'bilateral' paths to funding generally, especially for civil society working in potentially politically controversial areas – is that it is extremely difficult to measure impact of development assistance and other interventions. The only possibility is contribution analysis – which assumes that, subject to no evidence to the contrary, any given development assistance fund *has* made a contribution to the outcome.

only 2.5% of respondents consider the impact of the EU programs positive or very positive, while 94.7% of respondents do not know of EU development actions in their own country.

As well as showing the lowest level of awareness of EU programmes, Egypt also registers the most negative opinions of their impact in the country, at 37.7% (Figure 3). It is important to note that nearly half of those who *do* know of the EU's programmes rate them positive or very positive – about a quarter more than rate those programmes negative or very negative – although Egypt registers both the lowest levels of approval and the highest levels of disapproval of EU development programmes: Egyptians disapprove at twice the rate of Jordanians, three times the rate of Moroccans – both countries with long-standing EU presence in these areas –, with the remaining countries scoring far fewer negatives. The share of those evaluating EU development programmes as positive or very positive is lowest in Egypt (just under half), roughly 75% in Jordan, Morocco and Tunisia, and 85% in Libya and just under 90% in Iraq.

Again, it seems noteworthy that the two countries with the loosest and most recent cooperation framework with the EU – Iraq and Libya – display the most positive opinion of the Union's programmes, while Egypt's population has the lowest opinion of the EU's action.

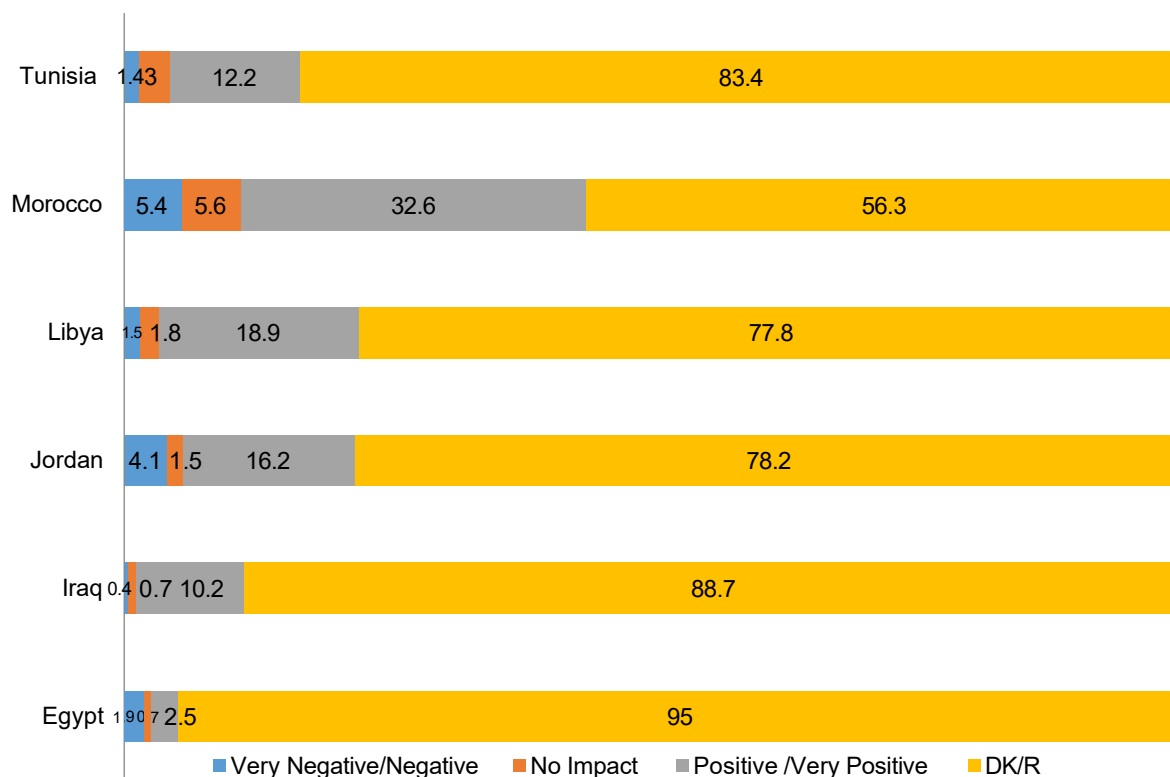
**Figure 6: Impact of EU Development/Cooperation Programs in your Country (% out of those having knowledge of them)**



*Source: Arab Trans, 2014*

The extent of the challenge facing the EU is evident from the aggregate data on awareness and impact of EU programmes.

Figure 7: Perceived Impact of EU Development/Cooperation Programs, % by country



Source: Arab Trans, 2014.

### Response

With regard to the assessment of EU programmes in *response* to the Uprisings, it is important to note the caveat that don't know/refusal responses were generally high: only in Jordan were these less than 10% of answers. The percentage of people who do not know or have never heard about post-Uprisings EU programmes is significant, especially in Egypt (35%). This suggests considerable caution in interpreting results, as well as the need for improved follow-up studies.

That being said, a higher proportion said they had heard of EU programmes in response to the Uprisings (Figure 5 below) than had heard of EU programmes generally. Although in Egypt it was still troublingly low – less than 1 in 5 (18%)<sup>8</sup> – in other countries the share was significantly higher (57% in in Morocco, 69% in Tunisia, 72% in Jordan).

Those who had heard of development cooperation programs generally thought they had a positive impact (Figure 3). However, *programmes implemented in response to the Uprisings were evaluated more negatively than EU programmes generally* or considered as having no effect, even in those countries with closer cooperation with the EU, despite the fact that people

<sup>8</sup> This may be because while the sums of money were large in absolute terms, the main donor by far following the Uprisings was the Gulf countries.

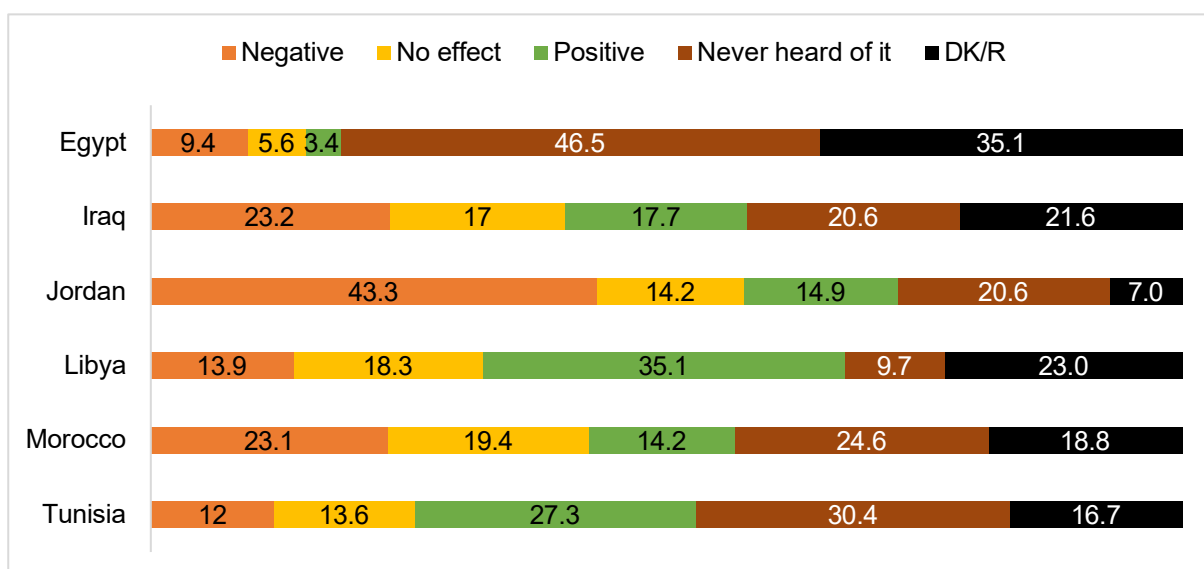
seemed to be more aware of post-Uprisings responses than EU programmes in general. With the notable exception of Tunisia – where just over half the respondents who had heard of EU programmes rated them positively – and Libya they were generally rated as ineffective or as having a negative impact. In Egypt, for example, about 80% of respondents either have never heard of EU programmes in response to the Uprisings (just under half) or did not answer (just over a third). Only 3% perceive them as positive, just over 5% perceive them as having had no effect, and just under 10% perceive the effect to have been negative. But it is not just in Egypt – where Western actors for one reason or another have a poor reputation at a popular level – where EU programmes produce little popular support for the Union: in Tunisia, only 27% of respondents were aware of EU programmes and rated them positively, with that proportion dropping to roughly 14% in both Morocco and Jordan, where a worrying portion of respondents knew about the programmes and believed they had a *negative* effect: 23% in Morocco, and 43% in Jordan. Jordan should be of particular concern because it also had the lowest level of respondents who had not heard of EU programmes – in other words, public opinion seemed to be relatively *better* informed than in other countries.

Jordan and Morocco also display the most negative assessment of EU programmes, despite having the longest-standing cooperation with the EU itself.

What is of additional concern is that this relatively more negative response compared to general programmes comes with a *greater* awareness. Clearly, the relationship between EU programme funding and perception of the EU merits greater investigation.

With the exception of a 'don't know'/refusal rate of just over 20%, Libya is the only unambiguously positive perception towards EU support in the aftermath of regime change and consequent aid and support.

**Figure 8: Assessment of EU Programs in Response to the Arab Uprisings (%)**



Source: Arab Trans, 2014.

*Appropriateness: What are the Most Positive Policies the EU could pursue?*

Finally, respondents were asked what support the EU *should* provide. This allows populations a direct input into the EU policy design process, and also affords an indirect assessment of the *appropriateness* of EU programmes.

A caveat is important here since the wording of this question does not match up entirely to the question respondents are asked about the policy areas the EU should prioritise. In the question about EU support to respondents' countries, respondents are asked to select two options from range including various types financial support, security, women's empowerment – but the question makes no reference to democracy. On the other hand, in the question on the EU's policy priorities, respondents are asked to select only one priority, and no option is offered to respondents on security. In addition, while the ArabTrans question on 'the most positive thing that the EU could do' was about the EU's own *policy areas* and focuses on the EU as active agent, the question on 'what kind of support think the European Union should provide' suggests an emphasis on *support*: in the former case, 'support' suggests something positive and helpful, and respondents may have answered at least partly based on the fact that the question presents the EU as the active agent, while in the second case the EU is ancillary to their own country which is the primary decision-maker. Policy intervention may be seen as negative and interfering by at least some respondents, and raises issues of conditionality and reward which support does not. In sum, policy areas and framing in the two questions are not directly comparable between questions, making triangulation difficult and comparisons necessarily imperfect.

Respondents were asked what two areas they would like to see the EU prioritise. In contrast to responses to the question on the EU's 'most positive policy', only a very small proportion said that the EU should *not* provide support, ranging from a high of 10% in Jordan to a low of 4% in Tunisia. However, nearly 20% of Egyptians said they did not know how the EU could best support their country.

In both questions development is a clear priority, suggesting that respondents' desire for policies that address socio-economic dislocation and EU programmes that will push in that direction is real. By some measure, respondents prioritise financial support for job creation and investments, for education and health, and for development-oriented loans.

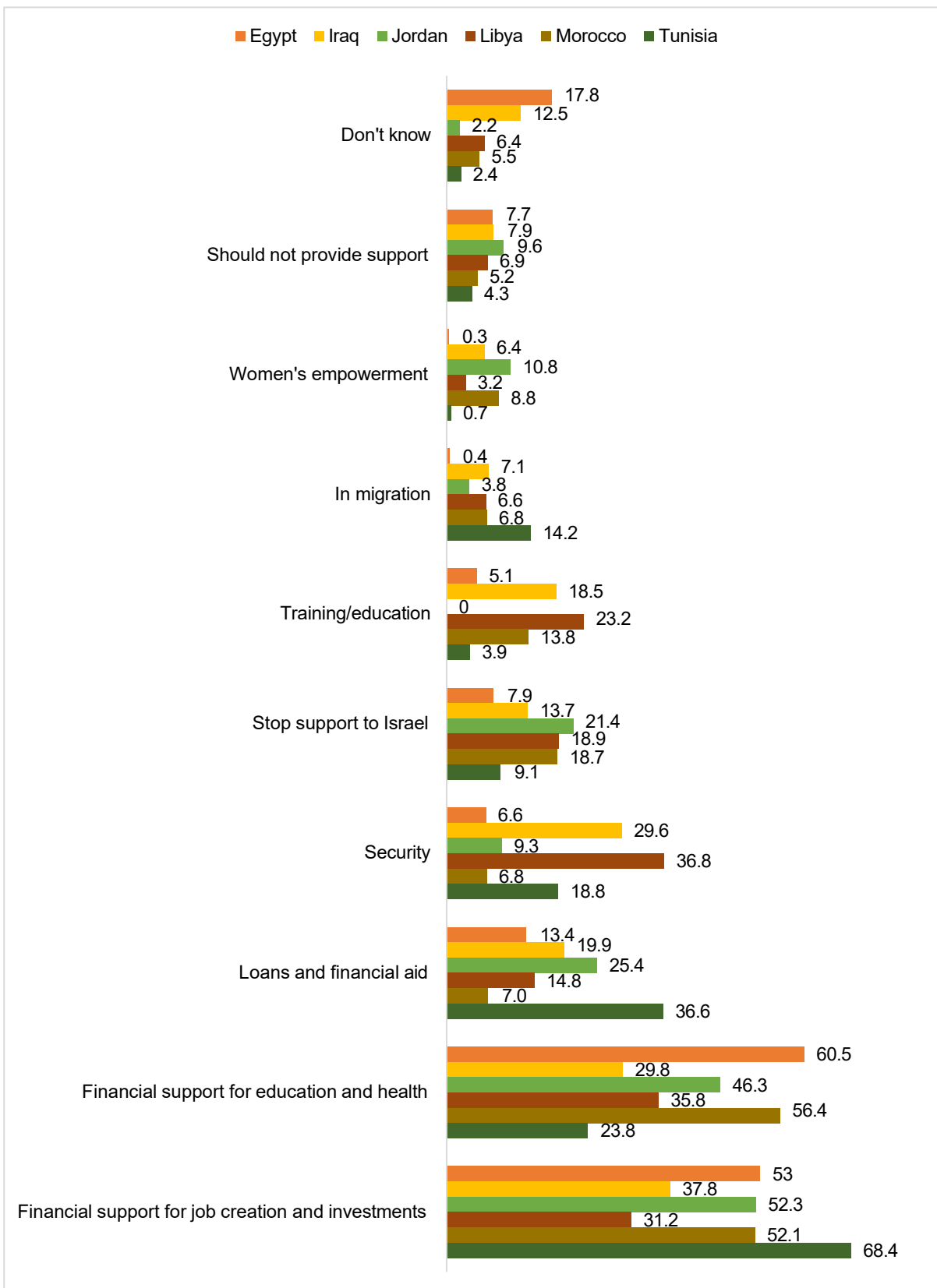
Another consistent answer in this context is action on the Palestinian/Israeli conflict: here also, respondents may view the issue as serious in its own right, but when it comes to pitting it against other priorities, it falls down respondents' rankings (although see the subsection above on the Palestinian-Israeli Question for more nuanced analysis).

It is interesting to note that in Libya and Morocco 36.7% would like to see a greater EU support to the military sector, followed 29.6% of people in Iraq. On the contrary, only 6.6% in Egypt

and 9.3% in Jordan believes that the EU should provide support in the military sector. It is worth noting that these two countries receive military support by other external actors, such as the United States and the Gulf monarchies.

In all countries, very few people think that the EU should support **women's rights** and empowerment (only in Jordan does support for this area reach 10%, in Morocco and Tunisia it is around 7%, and negligible in remaining countries), and on **migration** (with the partial exception of 14% of Tunisians, in all other countries less than 10% of respondents prioritise migration). These data are of particular concern, not least because women's rights are core to the EU's agenda and to its 'fundamental values' – as well as women's empowerment having a well-documented positive effect on development – and migration goes to the heart of the Union's concerns both about regional stability and about its own internal politics. It is important for research to determine the degree and manner in which the EU's own emphasis on women's rights in particular might be undermining rather than facilitating women's empowerment: in Egypt, for example, there is ample evidence that linking the pursuit of women's empowerment to cooperation with a local autocratic regime makes advances in women's rights vulnerable to attack from the conservative and religious right. In addition, it should also be noted that some women's activists themselves believe the EU should, rather than focusing on driving its own policies, pay more attention to activists and women themselves.

**Figure 9: Most Positive Way EU could support Respondents' Country, (Respondents Nominated Up to Two Ways, %)**

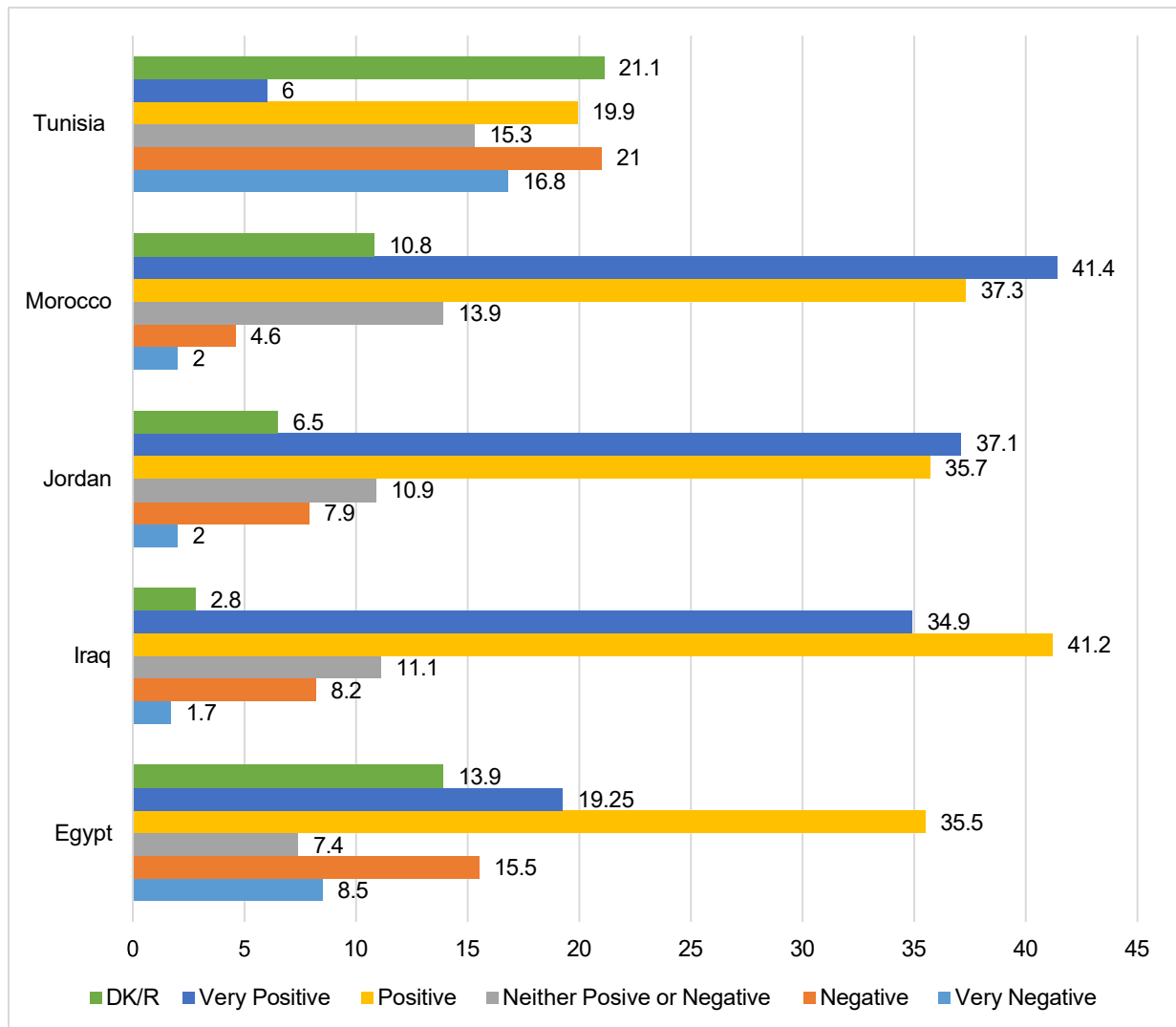


Source: Arab Trans, 2014.



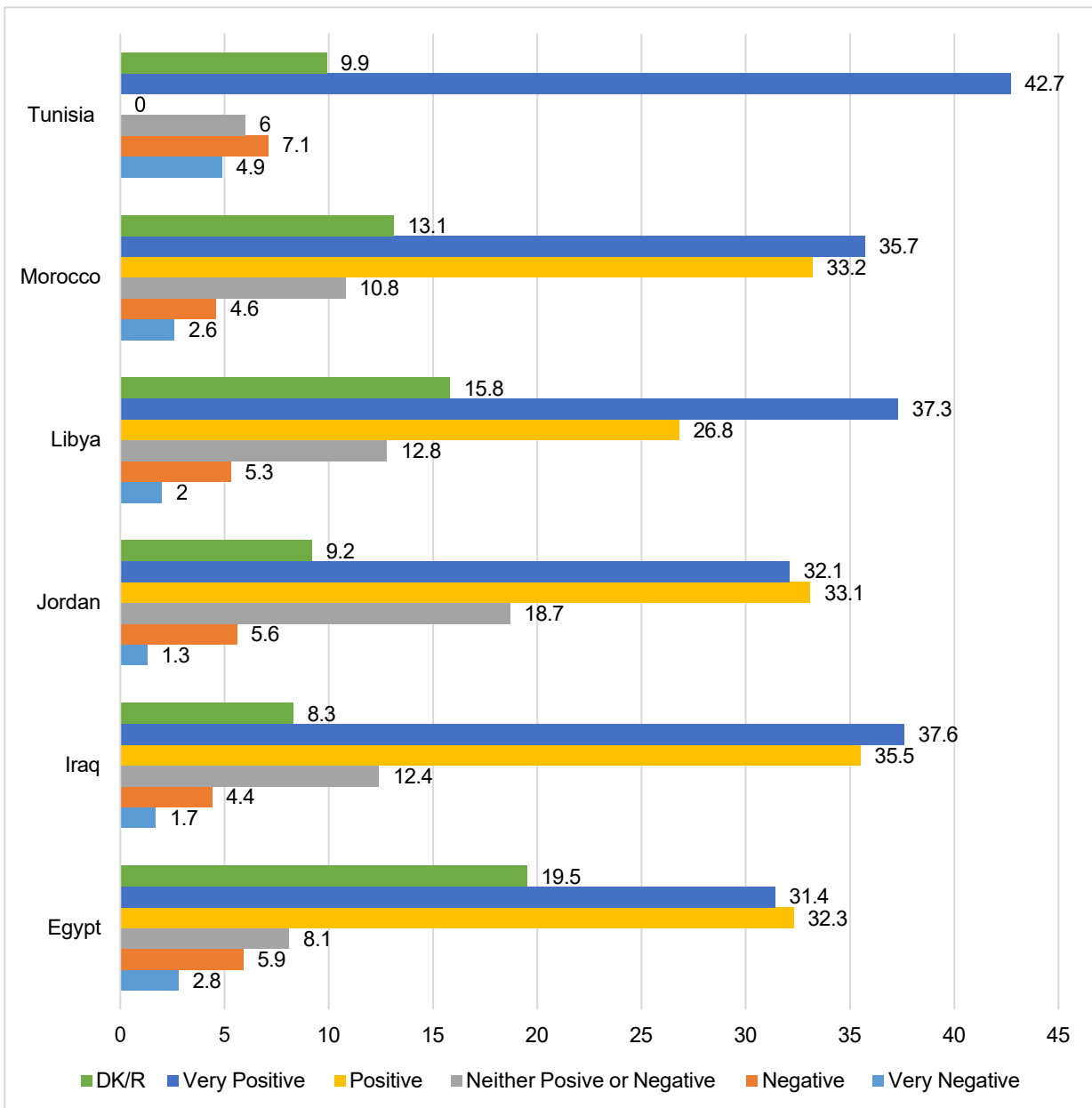
This preference for programmes focusing on economic development matches what can be found through other surveys. The EU as a whole and single European countries represent the main trade partner and one of the major source of foreign direct investment (FDIs) for Southern Mediterranean countries. This economic role seems the most acknowledged and appreciated at a popular level, as confirmed also by the Arab Barometer (wave 3) survey, in which people in the Arab countries surveyed evaluated very positively foreign economic assistance and FDI, although it does not specify who are the external donors and foreign investors.

**Figure 10: Evaluation of Impact of Foreign Assistance on Country's Economy, % of Respondents**



Source: Arab Barometer III.

**Figure 11: Evaluation of Impact of Foreign Direct Investment on Country's Economy, % of Respondents**



Source: Arab Barometer III.

## 4. Characteristics, Promotion and Progress of Democracy: The EU's Role

This section groups together analysis of questions focused on the perceptions of the characteristics and development of Democracy in surveyed countries, and specifically considers respondents' perceptions of impact of the EU.

In a direct 'Churchillian' question on whether respondents thought that, despite its problems, democracy was the best system of government, most people agreed, varying from a low of 61% in Egypt,<sup>9</sup> 78% in Tunisia, 80% in Morocco, and 90% in Jordan. However, 'democracy' in this context should not be taken either as meaning the same thing as the EU sets out in its Neighbourhood Policy documents, nor indeed as a homogenous signifier amongst respondents. Report D.925 sets out the characteristics of democracy in the former context (Teti, Talbot, & Maggolini, 2015), while this section scrutinises respondents' answers to begin to better identify their conceptions of democracy (for a preliminary analysis, see Teti & Abbott, 2016b).

### 4.1. Characteristics of Democracy

The first element in assessing surveyed populations' conception of democracy is a question asking respondents to indicate the two most important characteristics of democracy.

Unlike the emphasis EU documentation places on liberal and formal aspects of democracy (e.g. voting and elections), respondents placed more emphasis on egalitarian aspects of democracy – e.g. tackling corruption and ensuring people's economic security – and less emphasis on formal political aspects such as elections. This ought not to be surprising given the low levels of trust in the formal institutions of democracy – e.g. parliament, parties, and to a lesser extent government – and the rhetorical emphasis on those formal institutions, particularly often flawed elections, by regional regimes.

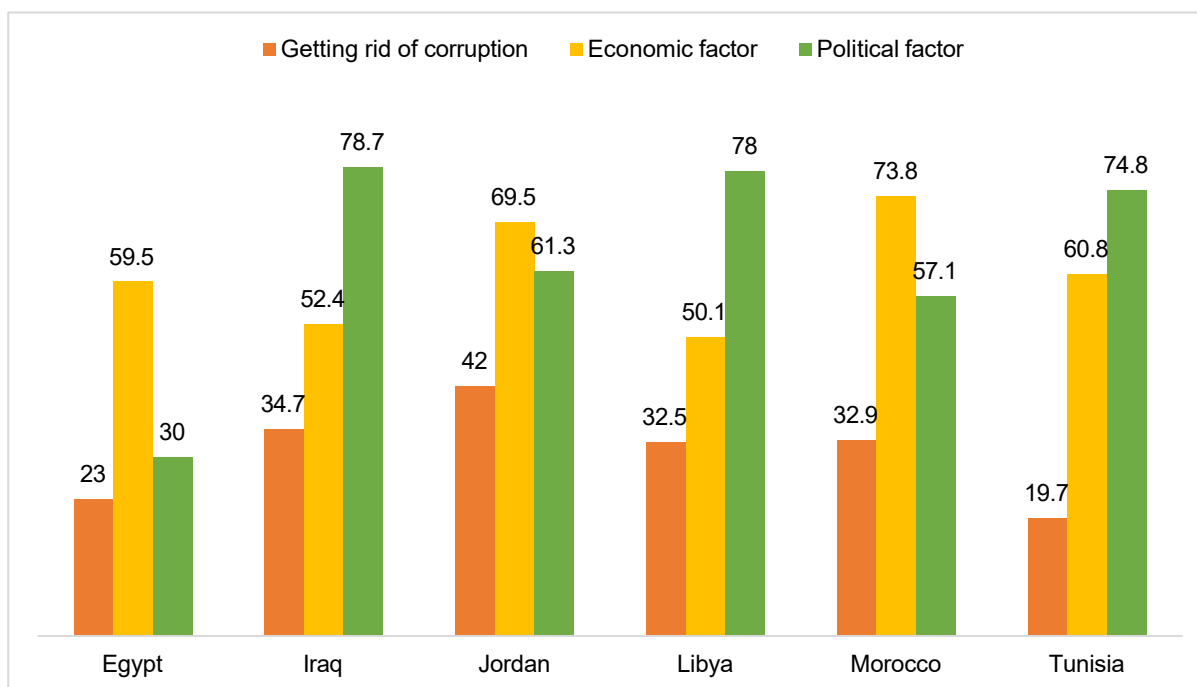
Taking elections and freedom to criticise a government as indicators of liberal democracy, only in Tunisia did a majority of respondents (60%) nominate one or both as essential characteristics of democracy: less than half of respondents in other countries mentioned formal, procedural aspects of democracy (Egypt 21%, Morocco 43%, Jordan 37%). In addition, only a small minority named only factors pertaining to civil-political rights as their two main characteristics of choice, i.e. selecting *both* changing governments through elections *and* freedom to criticise government (3.9% of Egyptians, 2.4% of Jordanians, 5.2% of Moroccans, 5.5% of Tunisians). This means that the *vast majority* of respondents mentioned at least one characteristic of

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<sup>9</sup> It is worth noting that a noticeable minority of respondents do not agree even with this very general statement which is about democracy in general and not e.g. suitability for their country.

democracy pertaining to socio-economic factors and rights. This suggests respondents in all countries surveyed may have a 'thicker' understanding of democracy than contained in the ENP policy documents, and may be more sensitive to issues of social justice, including social and economic rights, as well as other components of procedural democracy such as the rule of law, elections, and civil and political rights.

**Figure 12: Nominated as One of the Two Main Characteristics of Democracy (% , grouped by politics/economy/corruption)**



*Note: 26.3% of respondents in Egypt, 0.2% in Iraq, 0.7% in Jordan, 0.9% in Libya and 0.9% in Tunisia said they did not know. NB: Categories determined as follows: 1. Political (changing government's through elections, freedom to criticize government, political equality); 2. Economic Factors: low income gap, getting basic necessities, employment creation.*

BY way of interpretive caveat, it should be noted that, as people were asked the two essential characteristics of democracy but not what they thought democracy would deliver, some respondents may have given an intellectual answer while others gave answers based on what they think democratic countries deliver. This may explain why respondents mention getting a job relatively infrequently.

Clustering different responses without aggregating them also provides an indication of the relative importance of different factors within the civil-political and socio-economic categories. It is clear, for example, that in most countries, changing government through elections is the most important.

Political equality in Jordan is the only alternative to elections which scores higher in this category: for all other countries, it is respondents appear to prioritise elections relatively more

than both political equality and the freedom to criticise government.<sup>10</sup> The surprising factor is that amongst socio-economic questions, job creation ranks clearly lowest of the three factors in *all* countries (although note that don't know/refusals for Egypt are over 26%). This, however, should not be taken as an indication of satisfaction with employment levels or indeed conditions, because basic services score higher than job creation, as does the reduction of income inequality: the prioritisation of the latter two may well be due to the seriousness of respondents' concerns about basic conditions rather than a lack of concern about employment.<sup>11</sup>

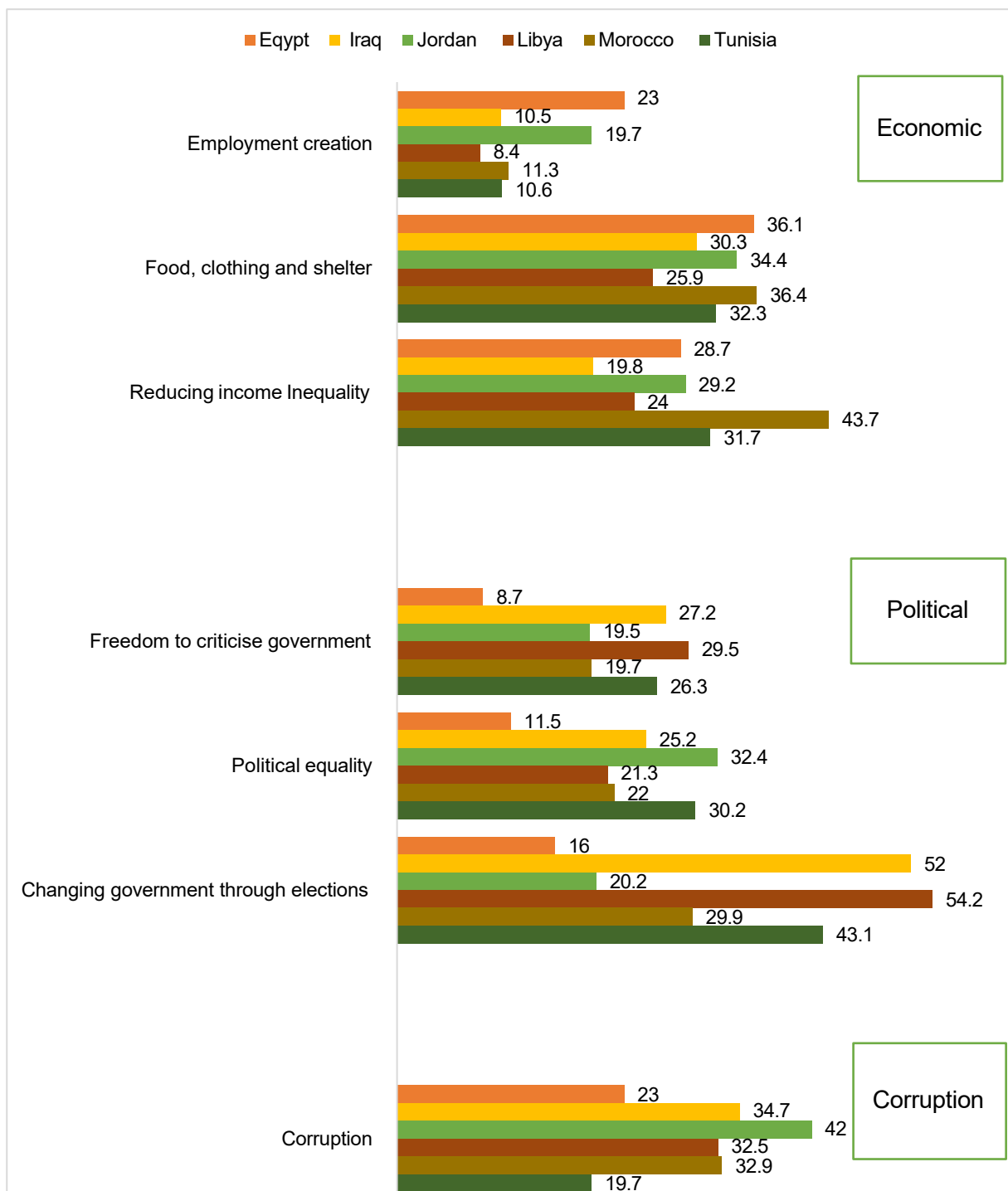
As for action on corruption, it receives between 20% of respondents' preferences in Tunisia and 42% in Jordan, where it is also the single highest-scoring characteristic of democracy in respondents' eyes. The fact that in a relatively more open autocracy such as Jordan people should prioritise corruption – and the fact that other measures of corruption actually suggest the problem is smaller here than in other surveyed MENA countries – provides a reminder that answers to such questions may be influenced as much by contingent priorities – or in any case by medium-term processes such as the dislocation caused by economic reforms – as by abstract values.

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<sup>10</sup> It should be noted that, strictly speaking, respondents are being asked what they see as the two most important characteristics of democracy – which is not precisely the same as what they want from government. In addition, it is important to remember that a noticeable minority of respondents in all the countries did not agree that despite all its faults democracy was indeed preferable as a system of government.

<sup>11</sup> NB: Since strictly speaking the question is about the most important characteristics of democracy – not what people want – it is possible that people may well want jobs as a priority policy, but that they may not think that it is a characteristic of democracy, although the emphasis on economic and social inclusion on the answer to that question suggests this is a possibility.

**Figure 13: Nominated as one of the main two important characteristics of democracy (% , disaggregated, grouped by category)**



Source: ArabTrans 2014. Note: 26.3% of respondents in Egypt, 0.2% in Iraq, 0.7% in Jordan, 0.9% in Libya and 0.9% in Tunisia said they 'did not know'.

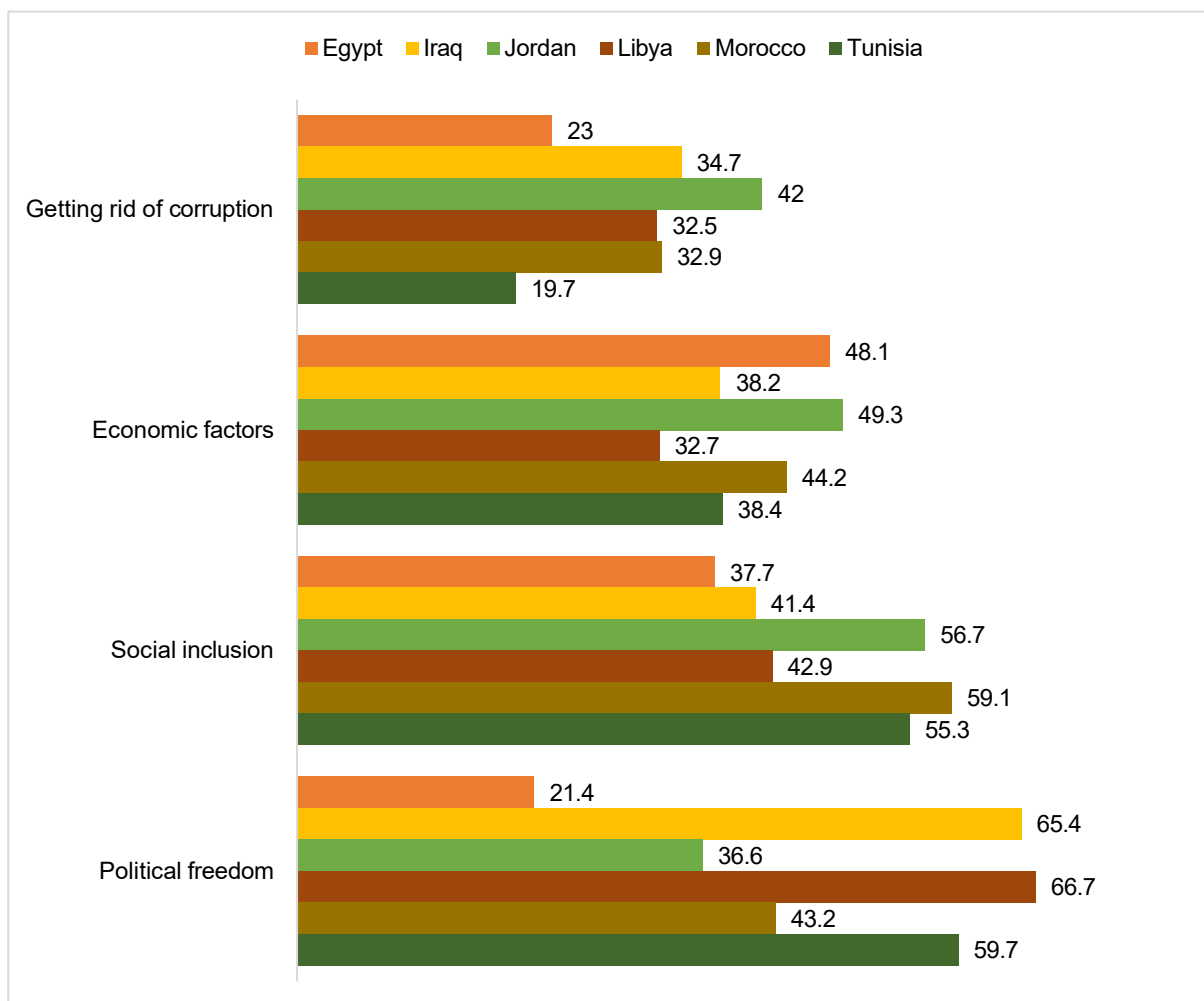
Grouping questions by social, economic, and political provides another way of viewing the balance between different types of factors in respondents' conceptions of democracy. Leaving aside corruption, which as a nexus between social, economic and political dimensions and as

such an important factor cannot be subsumed into any single category, it is clear that these three dimensions are comparably important for respondents.

Iraq, Libya and Tunisia share the same relative ranking, with corruption ranked below economic factors, social inclusion, and political freedoms in turn, albeit differences between these respective categories not being particularly pronounced.

It should be noted that for other countries, no particular pattern is apparent: as in most cases for surveyed countries, although scholarly and policy debates often take MENA countries as a group, it is clear that there are very significant internal differences and contradictions.

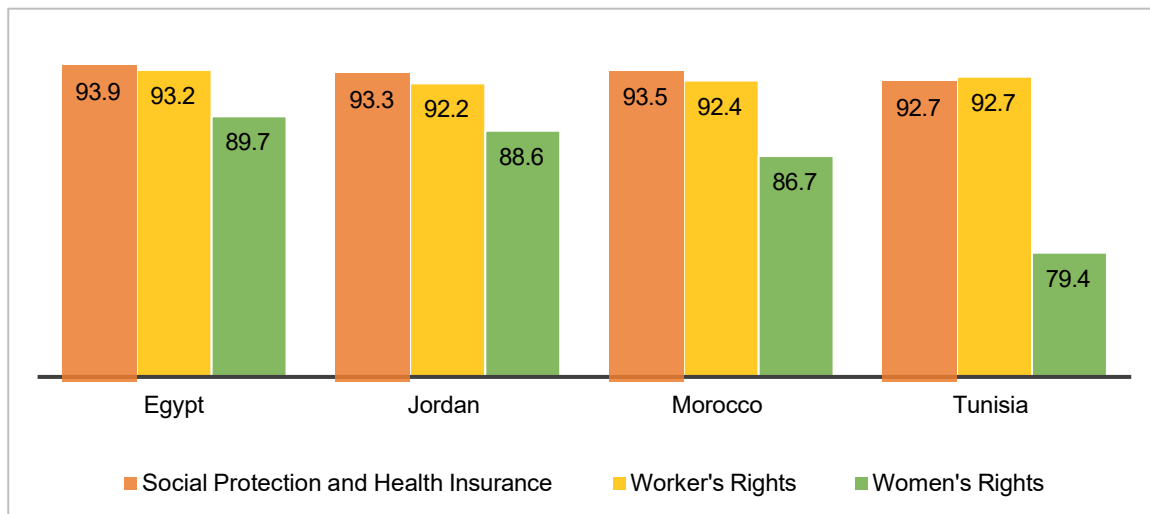
**Figure 14: Nominated as One of the main Two important characteristics of democracy (% by top four priorities)**



Source: ArabTrans 2014. Note: 26.3% of respondents in Egypt, 0.2% in Iraq, 0.7% in Jordan, 0.9% in Libya and 0.9% in Tunisia said they did not know. NB: Category groupings are determined as follows: 1. Political freedom (changing government through elections and freedom to criticize government) 2. Social Inclusion (political equality, low income gap); 3. Economic factors (basic necessities and getting a job); 4. getting rid of corruption.

These interpretations of ArabTrans data are confirmed by other survey data, in particular ArabBarometer III. Well over 80% of respondents in Egypt (88.8%), Jordan (86.5%), Morocco (86.3%), Tunisia (85.1%) said they support political freedoms (e.g. freedom of the press, freedom of expression, etc.). However, respondents also massively supported broader rights, including worker’s and women’s rights,<sup>12</sup> and the right to social protection and health insurance for the poor (Figure 13 below).

**Figure 15: Agree that it is important that worker’s rights, women’s rights and social protection and health insurance for the poor should be guaranteed by the Constitution (%)**



Source:

*ArabBarometer III.*

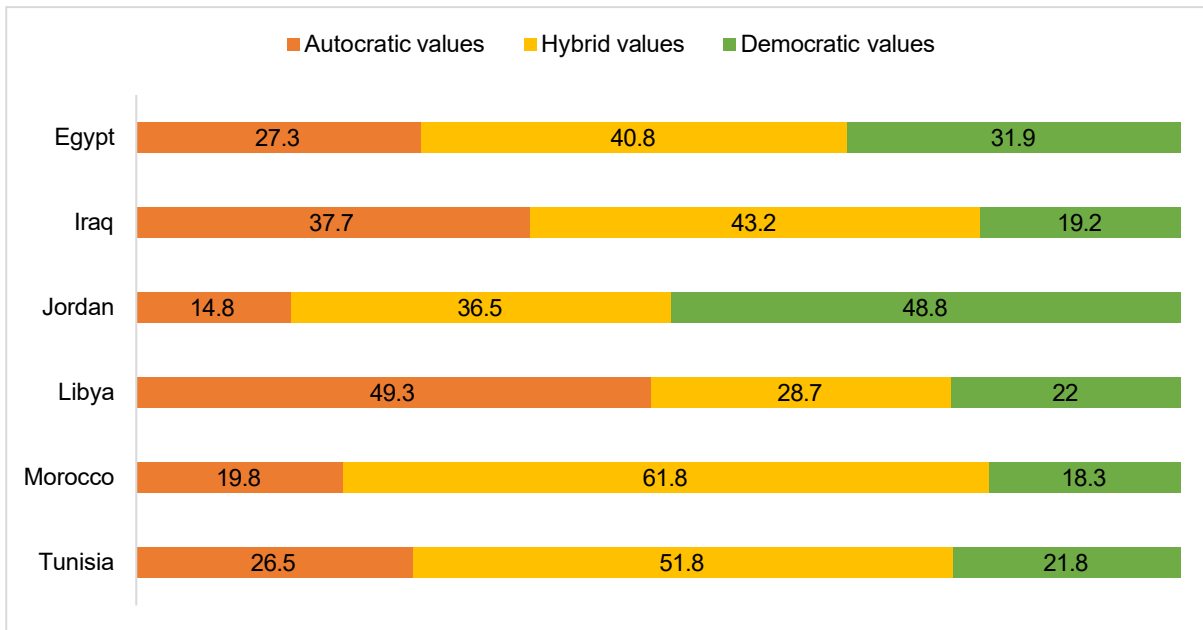
#### 4.2. Perceived Degree of Democracy

Asked 'How democratic is your country?', nearly 50% of Jordanians perceive their country to be democratic, and just over a third perceive it to have at least some democratic values (alongside autocratic ones). Nearly a third of Egyptians perceive their country as having democratic values (40% believe them to be mixed) while in Iraq, Morocco, Tunisia and Libya about 20% of respondents perceive their countries to be democratic. The highest levels of ambiguity can be found in Morocco (where 62% of respondents believe the country has hybrid values) and Tunisia (52%), and while that proportion falls in Jordan (36% and Iraq (43%), 40% of Egyptians are ambiguous with a surprisingly large additional 35.7% who don't know/refuse, which suggests the data for Egypt is , possibly failing to capture a significant portion of public opinion.

<sup>12</sup> Although it should be noted that 86% of respondents in Egypt, 91% in Jordan, 84% in Morocco and 71% in Tunisia think it is important that the Constitution guarantees Shari'a as the main source of legislation which arguable negates gender equality.



**Figure 16: How Democratic is your Country? (%)**

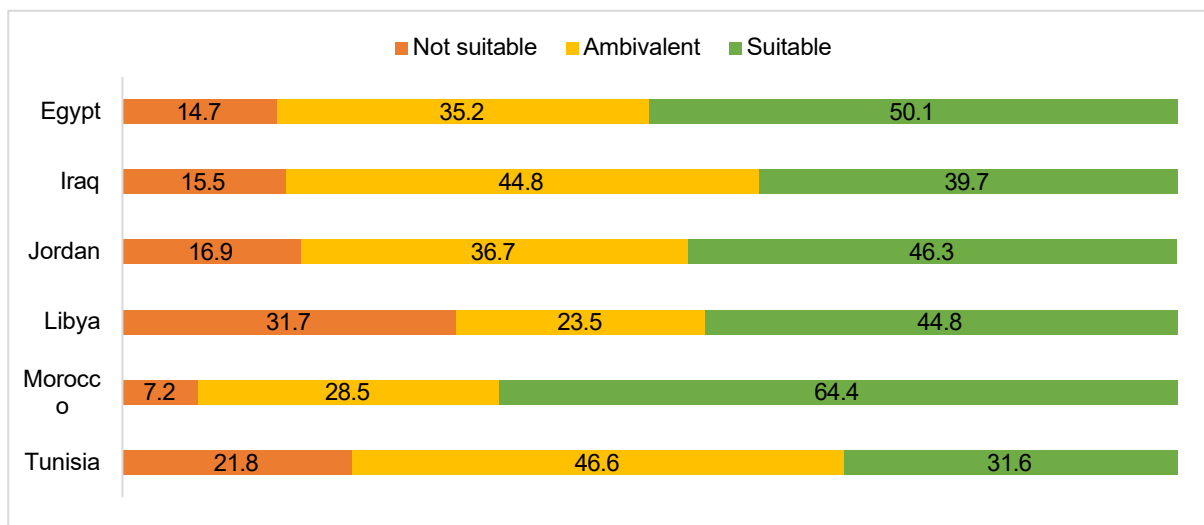


Source: ArabTrans 2014. Notes: 35.7% in Egypt, 1.7% in Iraq, 2.2% in Jordan, 15.2% in Libya, 5.2% in Morocco, and 6.1% in Tunisia are missing values and have been excluded. Note autocratic values = a score of 3 or less on a scale from 0-10 and democratic values a score of 7+

### 4.3. Suitability of Democracy

Asked 'How much democracy is *suitable* for your country?' (Q20), respondents answer affirmatively in anywhere between one third (Tunisia) and two thirds (Morocco) of cases, with others between 45-50%. The highest levels of ambivalence are found in Tunisia and Iraq (45% ca.), whereas the highest negative responses are in Libya (31.7%) and – notably – Tunisia, just over one in five. It should be noted that Libya and Egypt display high levels of don't know/refusals (nearly 36% and 15% respectively) which suggest great caution in interpreting this data as it may have failed to capture a significant portion of public opinion, particularly as pertains to Egypt, as there may have been a difficulty in understanding or in responding to the question.

**Figure 17: To What Extent is Democracy Suitable for your Country (%)**



Source: ArabTrans 2014. Note: 35.7% in Egypt, 14.7% in Libya, 2.4% in Iraq, 7% in Tunisia, 6.2% in Morocco, and 2.2% in Jordan, are missing values and have been excluded. Note: unsuitable = a score of 3 or less on a scale from 0-10 and suitable a score of 7+.

#### 4.4. EU Influence on Development of Democracy

Asked how influential the EU is on the development of democracy in their respective countries, with the exception of Egypt and Jordan, more respondents perceived the EU to have a positive effect than respondents felt it had a negative effect (Iraq 27.4% positive, 19.1% negative; Libya 39.2%–19.8%; Morocco 45.8%–22.5%; Tunisia, 41.5%–17.7%). Jordan was the most polarised country (25.6% positive, 45.8% negative), and Egypt the country with the lowest level of positive perceptions (a mere 5.7%) and also the greatest difference between negative and positive, at nearly a third of respondents (31.2%).<sup>13</sup>

In Morocco 45.9 per cent thinks the EU has a somewhat positive or very positive influence on the development of democracy in their country, followed by 41.5% in Tunisia, 39.3% in Libya, 27.6% in Iraq, 25.6% in Jordan, 5.7% in Egypt. However, in the latter the percentage of people who did not answer or not reply (no view) reached 57%, the highest score among all countries surveyed. With 41.5% of the respondents expressing a positive perception toward the EU's influence on the development of democracy, Tunisia also presents a relative high percentage of 'no view' (40.7%).

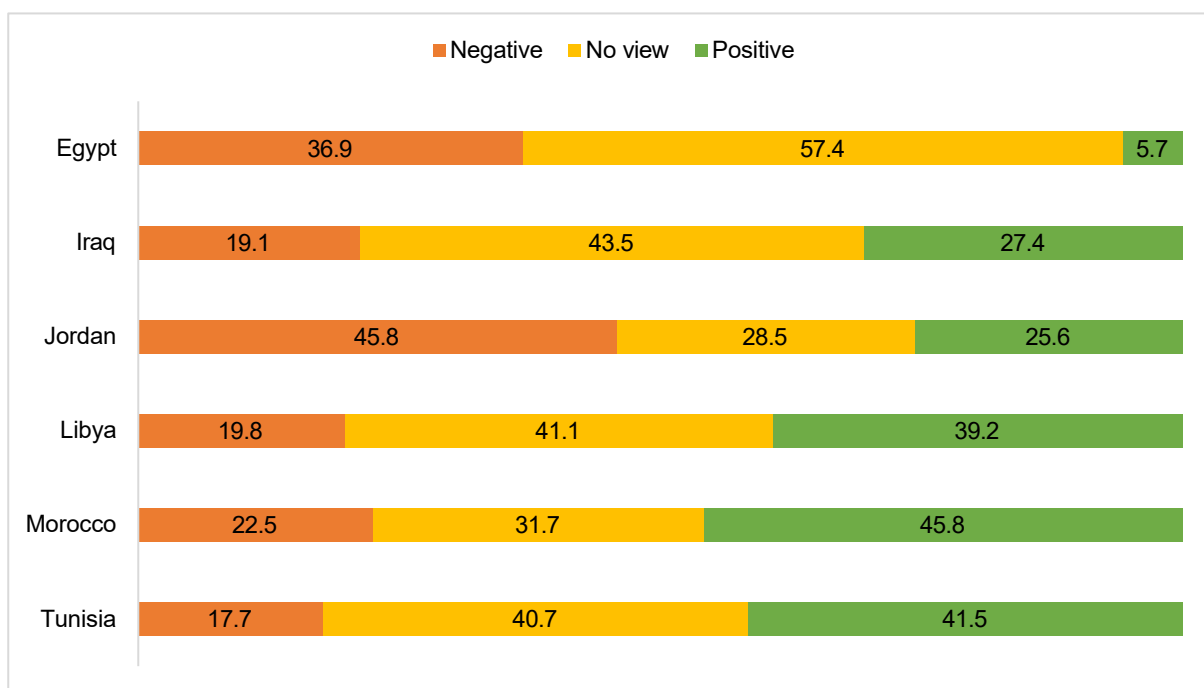
On the contrary, in Jordan 45.8 per cent considers the EU has a negative influence on the development of democracy, followed by Egypt with 36.9. This percentage reflects a significant worsening in perception after the Arab uprisings compared to 2010-2011, when 29.0 per cent

<sup>13</sup> Note that not everyone wants democracy in their country, while the question asked assumes that they do. The evaluation of EU will depend also on whether people want democracy at all, as well as on actual impact of EU.

considered negatively the role of the EU in fostering democracy in its own country (Arab Barometer, wave 2). The worsening happened in spite of the fact that Jordan – together with Egypt, Morocco and Tunisia – is one of the Mediterranean partner to which the European Commission addressed major support after the Arab Spring. Even in Egypt three years after the uprisings, we witnessed a worsening of perceptions, although much less evident than in Jordan, from 35.4 per cent to 37.7 per cent in 2014.

Perhaps the most striking result is the number of people who *do not have a view*, ranging from just over a quarter in Jordan (28.5%) to double that proportion in Egypt, where a massive 57.4% state they have no view. It should be said that such high proportions of respondents with no views are unlikely, particularly on this specific question, since respondents have been asked questions entailing one or both democracy and the EU elsewhere in the survey.

**Figure 18: Influence of EU on development of Democracy in your Country (%)**

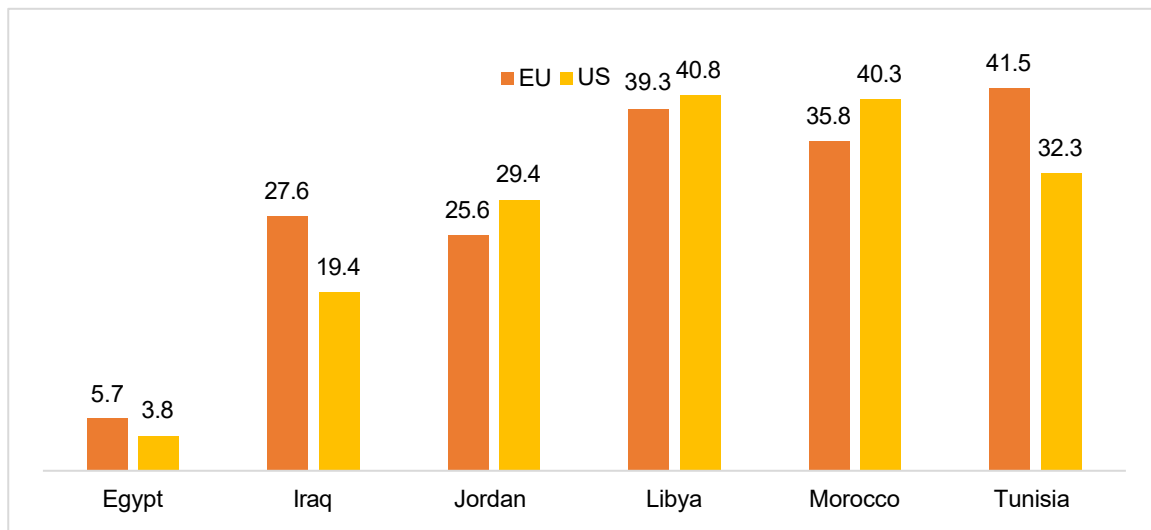


Source: ArabTrans 2014.

Generally speaking, respondents' opinion of the EU tends to track their opinion of the US fairly closely, whether low or high, suggesting either that respondents see the EU and the US pushing for democracy roughly in the same way and with the same results (and argument that matches some of the expert literature on democracy promotion in the MENA region), or that these answers may well be given as proxies for general opinion of the US and the EU. It should be pointed out that ArabBarometer data for 2013 suggests that only just over 10% of Egyptians and Jordanians, and 25% Moroccans and Tunisians thought that foreign interference was *not* an obstacle to reform in their respective countries. It is not then surprising that when it comes to the influence of the EU on democracy promotion, only a relative minority think the EU's –

or indeed the US' – role has been positive. Respondents were more positive about the EU's role in Tunisia and Morocco than in Jordan or Egypt. Egyptians were the most negative by quite some margin, which seems particularly significant since in 2011, 31% of Egyptians were positive. Conversely, Jordan and Tunisia saw small increase (from 19% to 26% in Jordan, and from 38% to 42% in Tunisia).

**Figure 19: Influence of EU and US on Development of Democracy in Own country, % Positive or Very Positive**

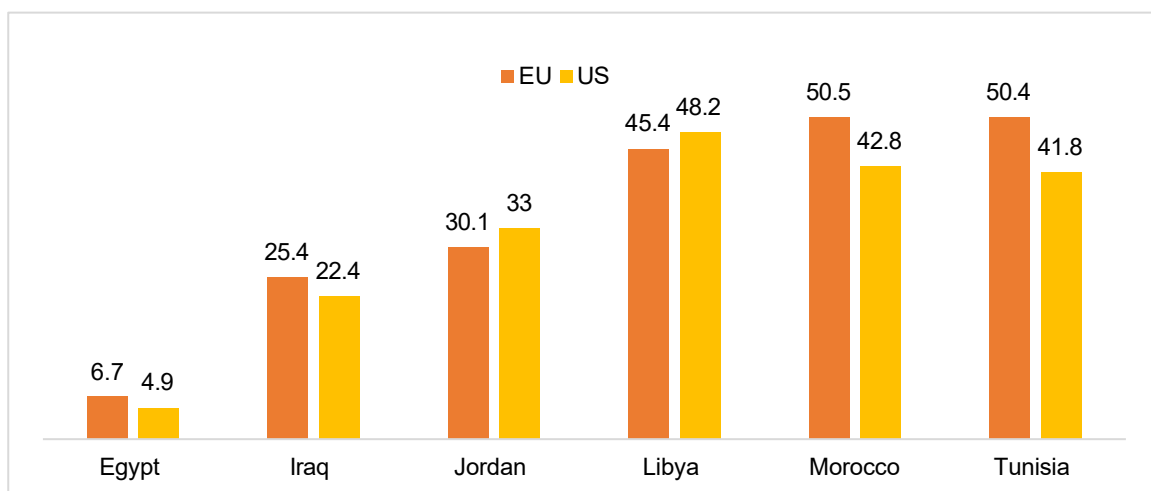


Source:

*ArabTrans 2014.*

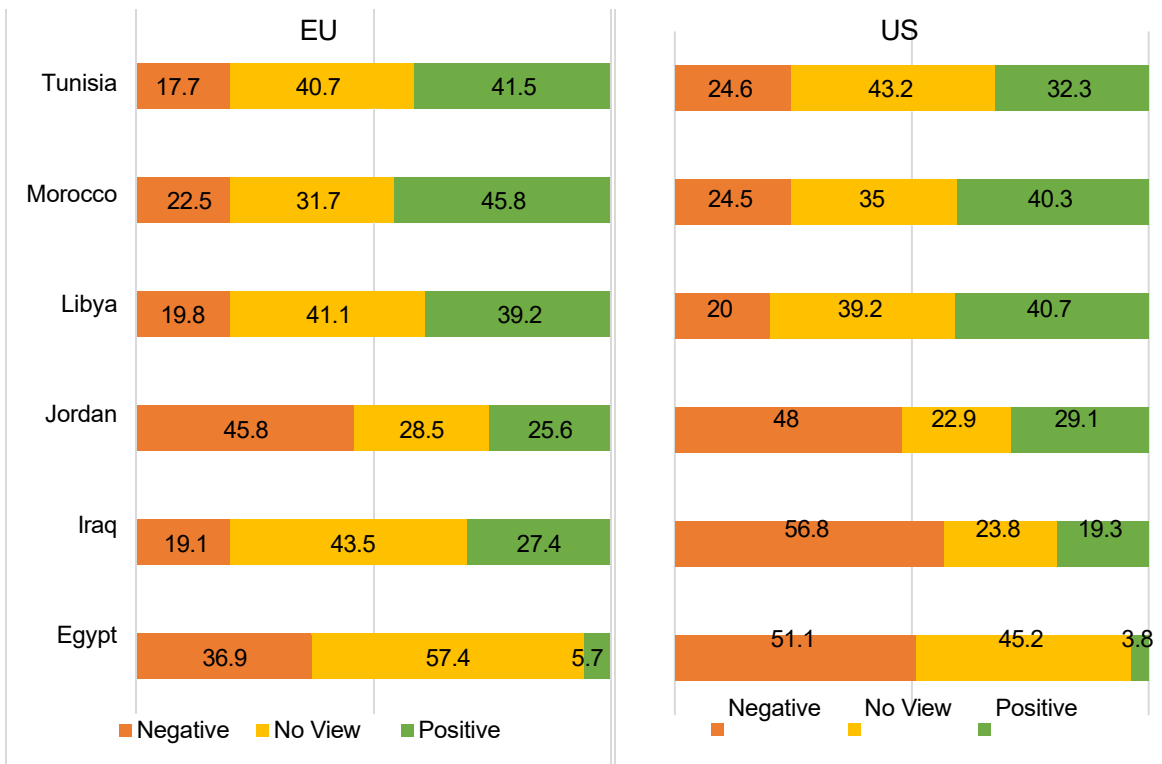
It may be instructive also to note the differences – or lack thereof – when only those who believe democracy is indeed suitable are counted.

**Figure 20: Influence of EU and US on Development of Democracy in Own country, % Positive or Very Positive, % of those that think democracy is suitable for their country**



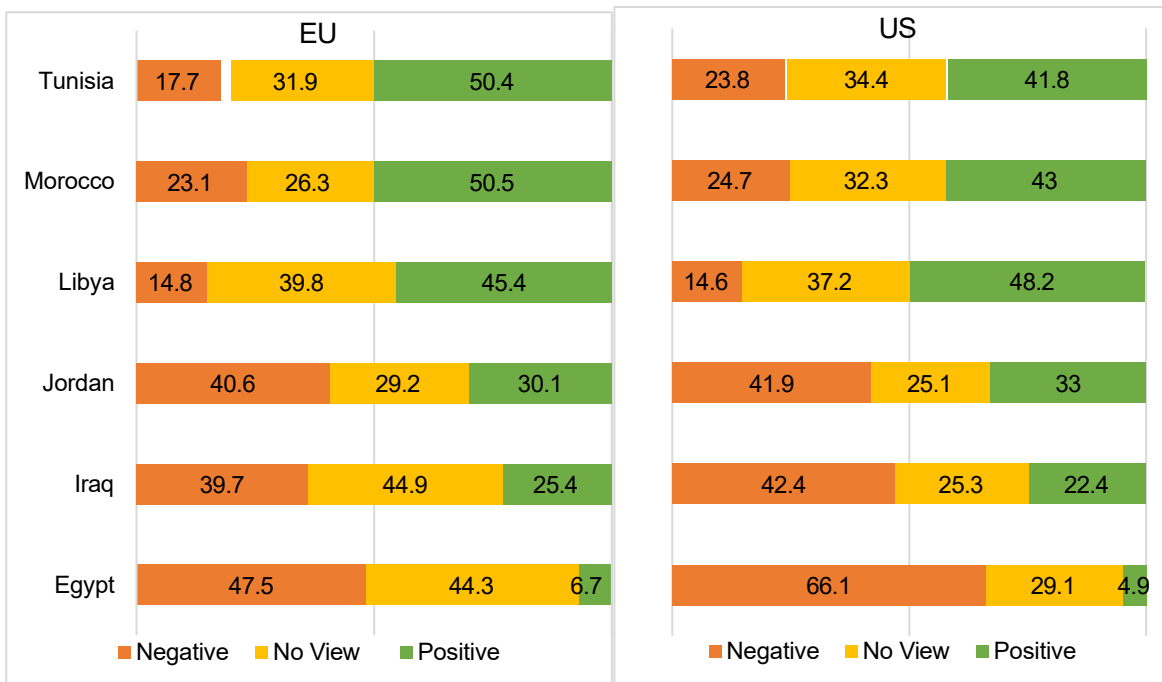
Source: *ArabTrans 2014.*

**Figure 21: Influence of the EU and US on the development of democracy, % Influence in Respondent's country**



Source: ArabTrans 2014.

**Figure 22: Influence of the EU and US on the development of democracy, % influence in respondent's country, respondents who think democracy is suitable for their country**



Source: ArabTrans 2014.

## 5. Perceptions on Relevant Policy Areas

This section contextualises the discussion of democracy above by focusing on the broader spread of policy priorities and MENA populations' perceptions of these. The section is divided into three sub-sections: politics and society, the economy, and the geopolitical context.

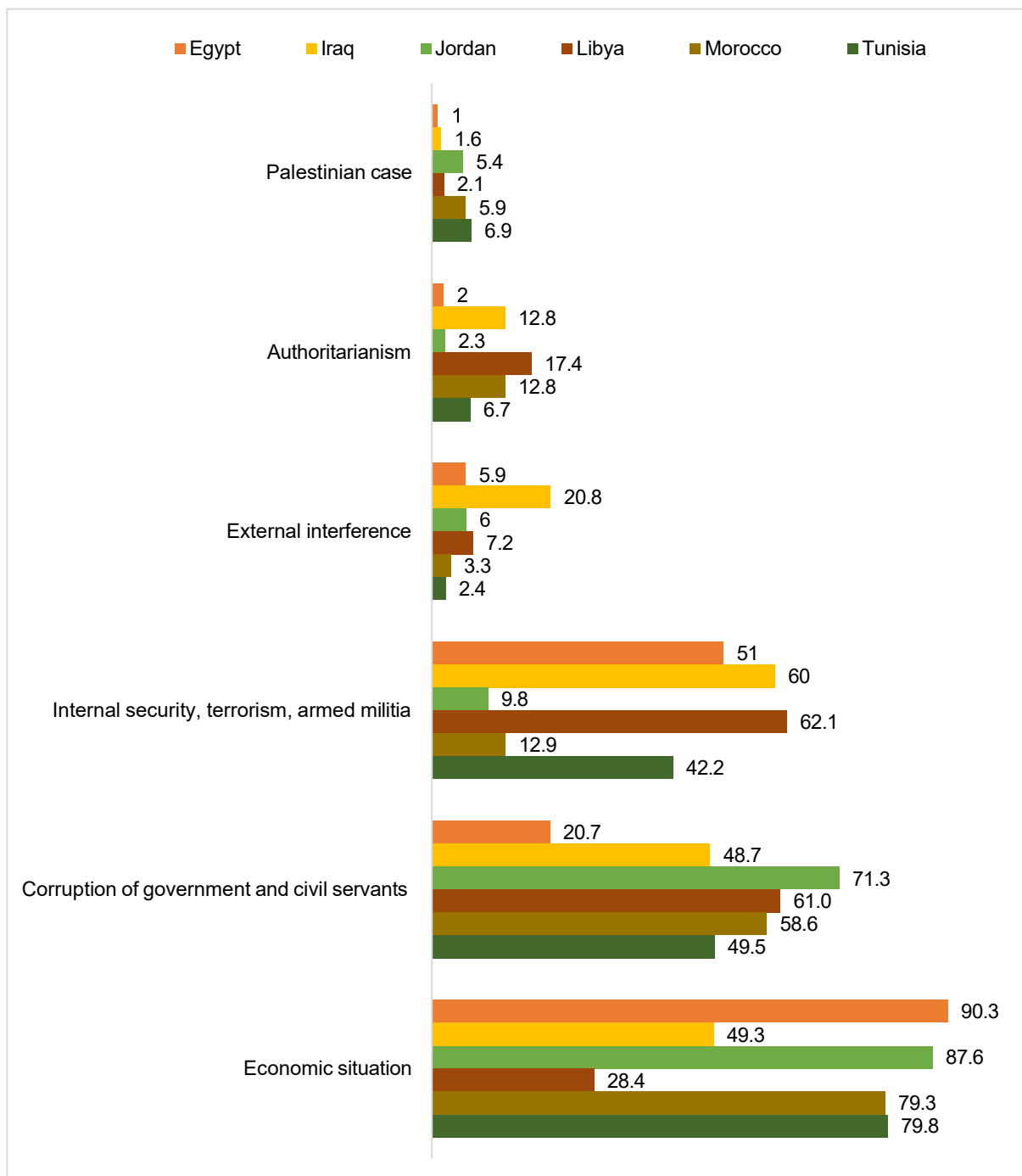
### 5.1. Politics and Society: Challenges

Respondents were asked to identify two main challenges facing their countries in 2014. It should be noted that unfortunately respondents weren't given an explicit reference to democracy – much less distinguishing between procedural-institutional dimensions and substantive socio-economic dimensions – as they were in questions about EU policy priority areas.

Most frequently nominated by some margin was the economy. Only in Libya and Iraq was this not the case, with security – understandably, for countries riven by conflict – being a greater concern in both cases. In Libya respondents focused more on corruption and internal security, while in Iraq the economy was on a par with corruption, and both ten per cent lower than internal security at just under 60%.

Strikingly, external interference and the Palestinian question are nominated by a very small proportion of respondents: this suggests that while these factors may be important, they are not concerns of the same magnitude as the **economy**, **corruption**, and **security**, suggesting perhaps also that they might not be considered the serious obstacles to internal reforms they are sometimes believed to be. Official corruption was the second most frequently nominated challenge in all countries except Egypt. It would, however, be unwise to underestimate the importance of corruption. When asked about the extent of corruption in state institutions, over three quarters of Egyptians (77%) thought it was a problem, and an even greater share thought it was a problem in Jordan (88.2%), Morocco (89.3) and Tunisia (85%). Nor do respondents see their governments as doing much about such corruption levels.

Figure 23: Nominated as one of the two most important challenges facing the country today



Source: ArabTrans 2014.

## 5.2. The Economy

When asked about the national economy today in no country did more than 25% of respondents perceive it as being 'good', and in Tunisia this share fell to barely over 3%. Morocco and Egypt displayed the highest levels of uncertainty at just over 40%, while the most negative judgement by far was given by Egyptians, according to three quarters of whom the economy in late 2014 was bad, followed at some distance by Jordan (54.4%), Iraq (50.4%)

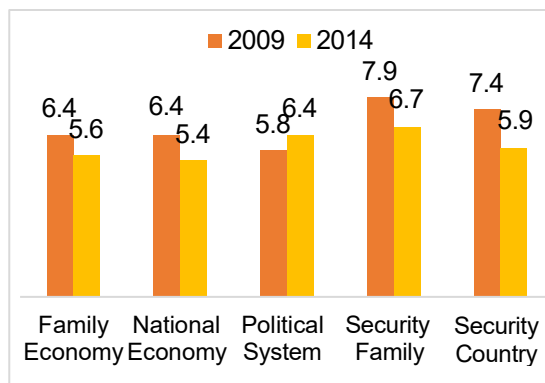
and Libya (48.7%). Nor did those perceptions improve since the Uprisings (see Teti & Abbott, 2016a).

**Figure 24: The National Economy Today (%)**



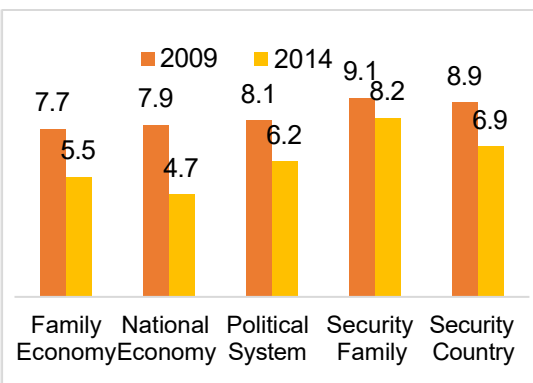
Source: ArabTrans 2014.

**Egypt**



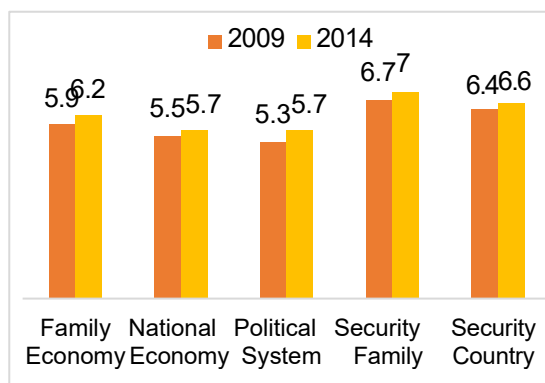
sig t<0.001

**Jordan**

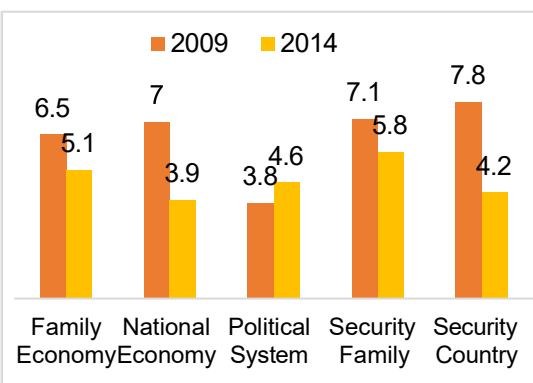


sig t<0.001

**Morocco**



**Tunisia**





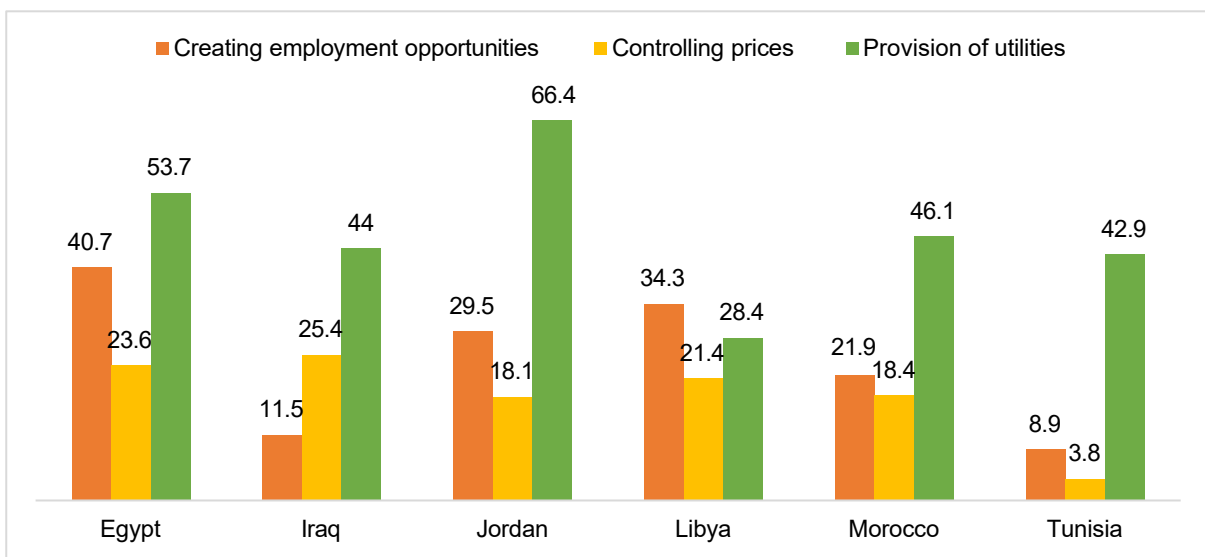
sig t<0.001

sig t<0.05

Narrowing gap between rich and poor probably not necessarily what those that see economic situation as a major challenge want?

Although the questions on performance and those on satisfaction are not matched, undermining a direct comparison, the degree of concern with all aspects of the economy and its management are clear. Only in Egypt (53.7%) and in Jordan (66.4%) are more than half of respondents satisfied with the government's performance in providing utilities, and the highest level of satisfaction with the government's creation of job opportunities is Egypt by some margin, although still less than half of respondents express satisfaction (40%) and other countries display considerably less, from a relative high of Jordan (29.5%) to a low of under 9% in Tunisia. Satisfaction with the government's control of inflation is even lower: from 'highs' of 25.4% in Iraq, to barely 3.8% in Tunisia.

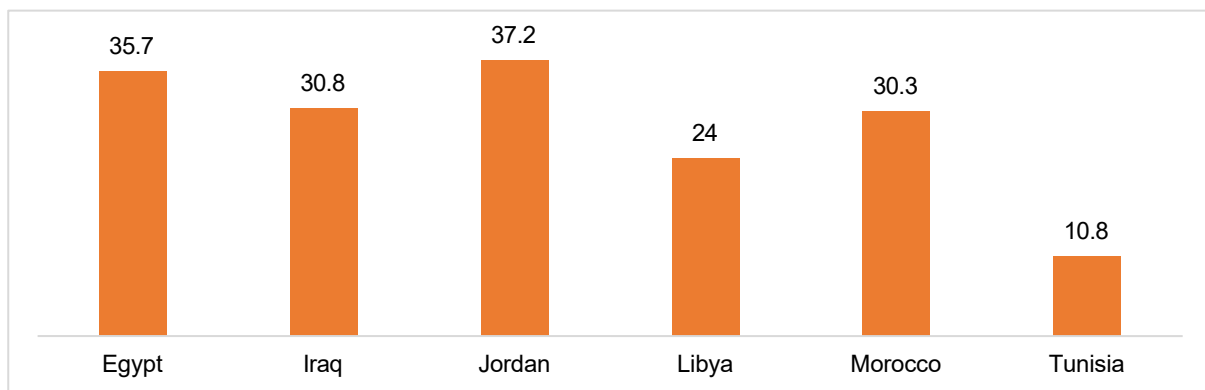
**Figure 25: Government Performance: Employment, Prices, and Utilities (%)**



Source: ArabTrans 2014.

The dissatisfaction with government performance is reflected in respondents' expressions of (dis)satisfaction with the development of the economy: in all cases, less than a third of people is either 'satisfied' or 'very satisfied', with this proportion dropping to barely over 10% in Tunisia, which also had the lowest rates of satisfaction with employment creation and inflation control by government.

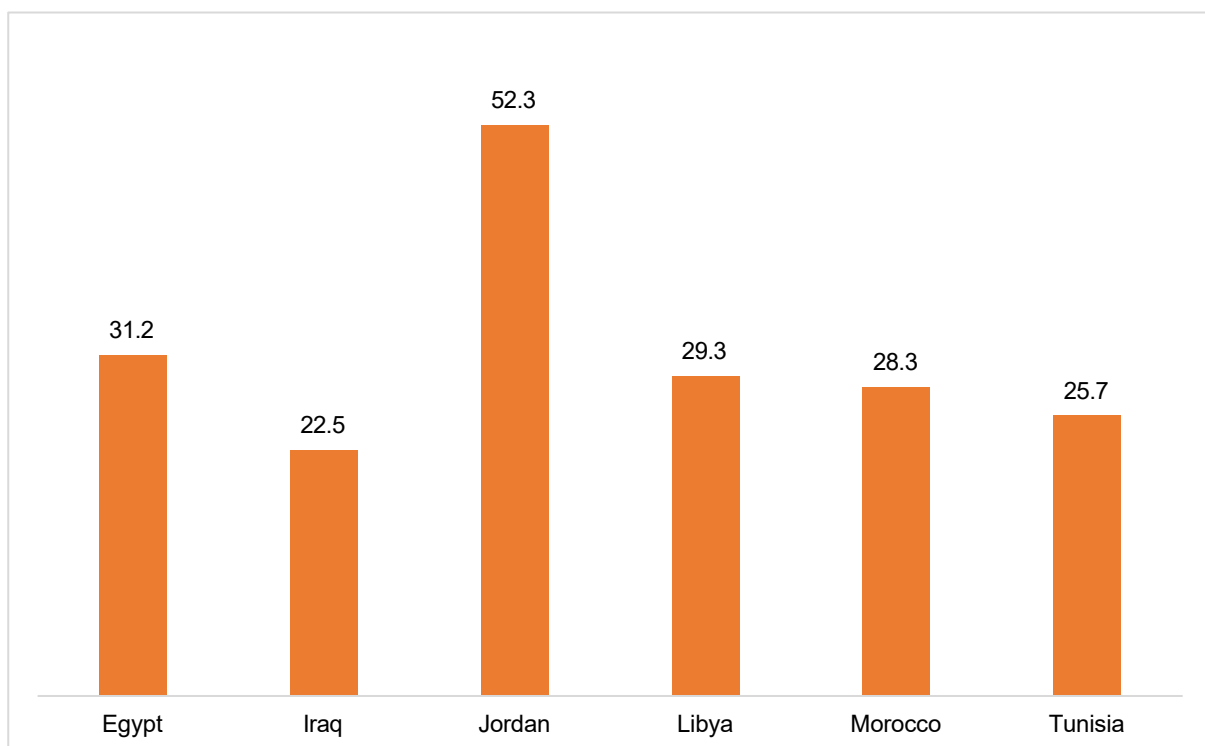
**Figure 26: Satisfied/Very Satisfied with the way the Economy is Developing in your Country (%)**



*Source: ArabTrans 2014.*

Figures for satisfaction with welfare provision (social security) are slightly higher than those for the economy generally.

**Figure 27: Satisfied/Very Satisfied with the Social Security System in your Country (%)**



*Source: ArabTrans 2014.*

Taken together, it is clear that those who are dissatisfied with the economy overall are likely to be dissatisfied specifically about jobs and prices, although only in Jordan and – marginally – in Egypt are a majority satisfied even with government provision of basic services (education, healthcare, welfare).

Respondents are specifically dissatisfied with government performance in provision of employment opportunities and inflation control, although only a third of respondents are satisfied with the way the economy is developing in Egypt, Iraq, Jordan and Morocco, barely a quarter in Libya, and a mere one in ten in Tunisia.

The picture that emerges is of respondents who appear slightly more satisfied with the provision of welfare services and basic utilities than they are with the way the economy is developing, although in all cases responses indicate a considerable degree of dissatisfaction both with the economic situation and with governments' responses to it.

### 5.3. Security and Geopolitical Context

One of the least explored areas of processes of socio-political transformation generally and transitions to democracy specifically is the impact of the international political context. The ArabTrans survey, as well as a specific battery of questions on the EU, contains other questions designed to identify popular perceptions of that international environment, and while these cannot easily be used to infer the nature of that environment from the questions alone, these do provide a useful indication particularly for policy-makers to assess major states' reputation with the population at large.

#### 5.3.1. Perception of the Regional and International Context

Respondents were asked which countries they perceived to be contributing to *stability or instability* in relation to their country (Q32). Possible responses included major regional and global state actors (e.g. USA, Israel, Iran, China, Russia, Turkey) as well as some international bodies (EU, Arab League).

The countries most consistently identified as contributing to regional *instability* were Iran and Israel. On the other hand, China, the Arab League and in part Russia are more consistently identified as contributing to regional *stability* (although Russia for example elicits negative response from Jordanians and Libyans).

The perception of Turkey, of the EU, and of the US is more polarised. The US is perceived as destabilising in Egypt and to a lesser extent in Iraq and Jordan, but as stabilising by roughly half in Morocco, with opinion more or less evenly split in Tunisia and Libya. Turkey is perceived as stabilising by Tunisians and Moroccans, but destabilising by Egyptians (by a factor of nearly eight to one) and Jordanians (where opinion is more evenly split than in Egypt), while Iraqi and Libyan public opinion is more evenly split and more polarised.

#### *Perceptions of the European Union: stabilising or destabilising?*

The EU is viewed as stabilising by just over half in Morocco and Tunisia, but destabilising by nearly half in Jordan and by about a third in Egypt, with Libyans and Iraqis more evenly split.

As a key regional state, the reputation of the US and of the EU in Egypt must be of particular concern.

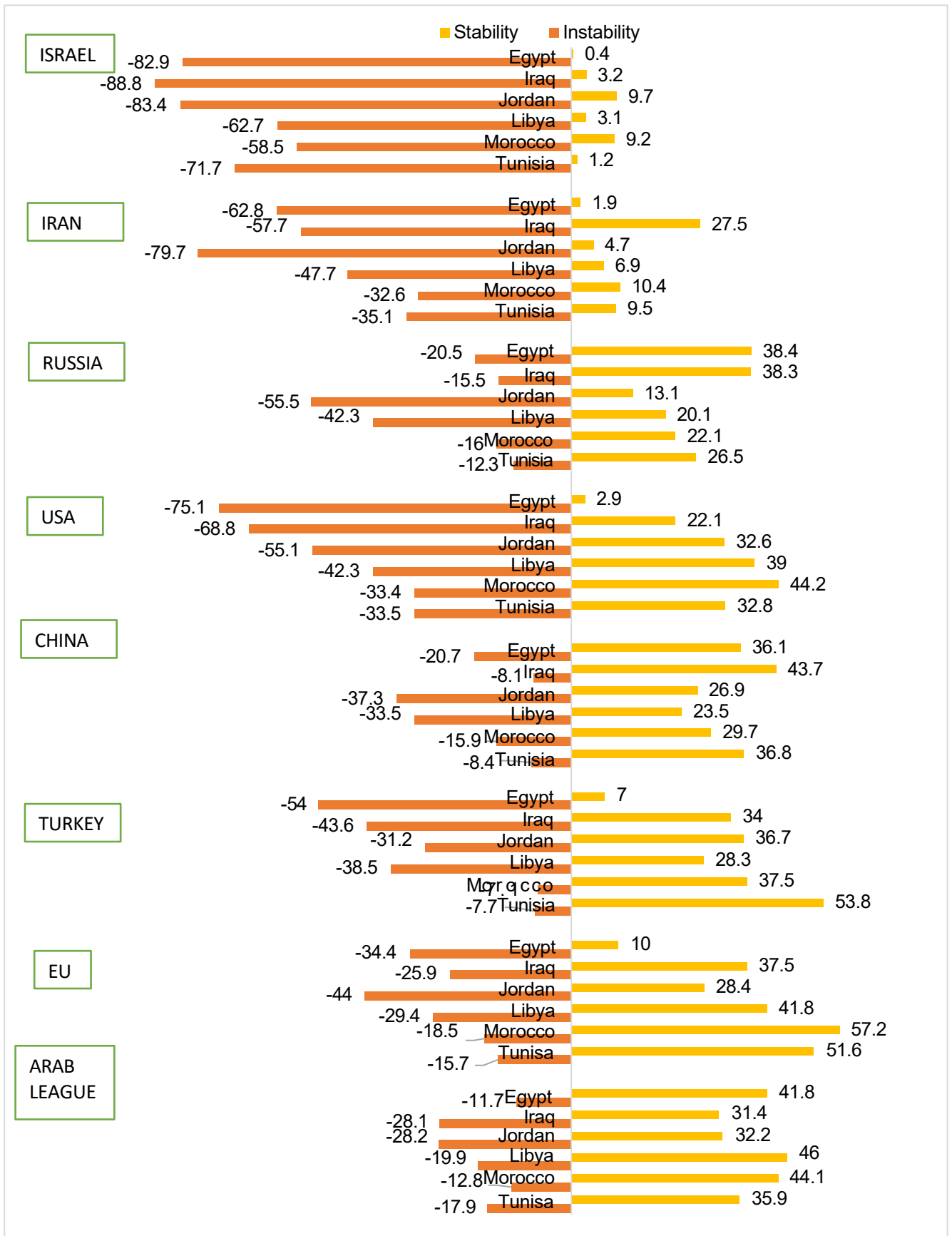
Across the Arab countries surveyed, the EU is perceived as a factor of stability by the majority of respondents in Morocco (57.3%, whereas 18.5% believed it was destabilising) and Tunisia (51.6%, with 15.7% perceiving it to be destabilising), and by a plurality of respondents in Libya (42%) and Iraq (37.6%) with a narrower margin between opposing perceptions, which stood at 29.4% and 25.9% respectively. Given the internal divisions of Iraq and Libya, this is perhaps not surprising.

In the remaining countries only a minority considers the EU as a stabilising actor: 28.4% in Jordan (44.1% consider it a factor of instability), followed by 10% in Egypt (37.4% consider it destabilising). Egypt also displays the highest percentage of 'do not reply/know' responses (41.5%).

In relation to Jordan, it is worth pointing out that the figure is quite striking, given the strong relations between Amman and Brussels and the amount of aid the EU provides, including throughout the Arab Uprisings. Nevertheless, the full picture seems suggesting the necessity to elaborate a more nuanced and developed definition and understanding of "stability" within the region and in relation to the EU role, further contextualizing it within the specific characteristics of the distinct Arab political fields.

Egypt also deserves mention, given its strategic significance and the EU's efforts to engage successive governments since 2011 as well as Mubarak before, the low level of positive perception is of concern, although once again the large number of 'don't know'/refusals suggests considerable caution in interpreting these results.

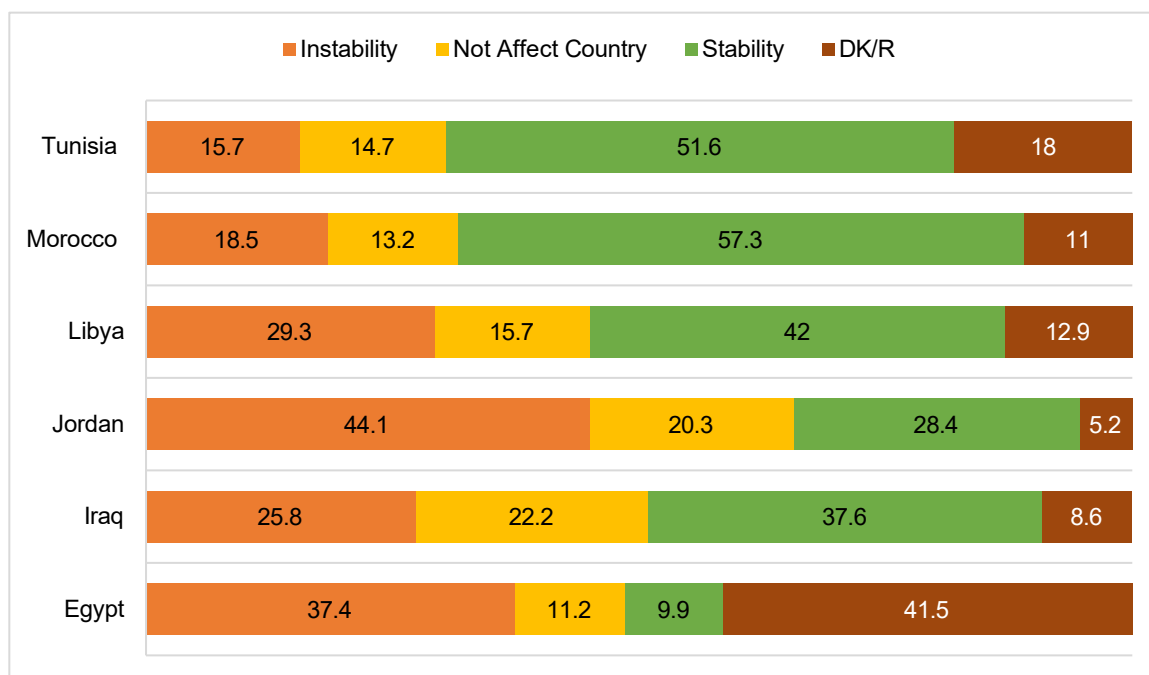
Figure 28: Countries seen as a factor for stability or instability



Source: ArabTrans 2014.

Across the Arab countries surveyed, the EU is perceived as a factor of stability by the majority of respondents in Morocco (57.3 per cent) and in Tunisia (51.6 per cent), while 42 per cent of respondents in Libya and 37.6 per cent in Iraq expressed a positive perception. In Jordan only 28.4 per cent considers the EU as a factor of stability, followed by 9.9 per cent in Egypt, where the highest percentage of 'do not reply/know' answer has been registered (41.5 per cent). On the contrary, 44.1 per cent of people in Jordan and 37.4 per cent in Egypt considers the EU as a factor of instability/threat for stability. Tunisia is the country with the lowest level of perception of EU as a factor of instability (15.7 per cent). In particular, focusing on the results of Jordan, it is worth to point out that the figure is quite controversial, giving the strong relation between Amman and Brussels and the amount of aid that the EU provided to this country also during the outbreak of Arab revolts and uprising in the region. Nevertheless, the full picture seems suggesting the necessity to elaborate a more nuanced and developed definition and understanding of "stability" within the region and in relation to the EU role, further contextualizing it within the specific characteristics of the distinct Arab political fields.

**Figure 29: Perception of the EU as Having a Stabilising/Destabilising Influence (%)**



*Source: Arab Trans, 2014.*

Nevertheless, when compared to other external players (US, China, Russia) or regional actors (Iran and Turkey), the EU is not ranked among the main factors of instability or a threat. The EU ranks first as a factor of stability in Morocco and Libya, second in Tunisia (after Turkey), third in Jordan (after Turkey and US), Iraq (after China and Russia), and Egypt (after Russia and China). In Egypt, Iraq, Morocco and Tunisia, the US is considered the main factor of instability, while in Jordan and Libya, Iran is perceived as the major threat among external players.

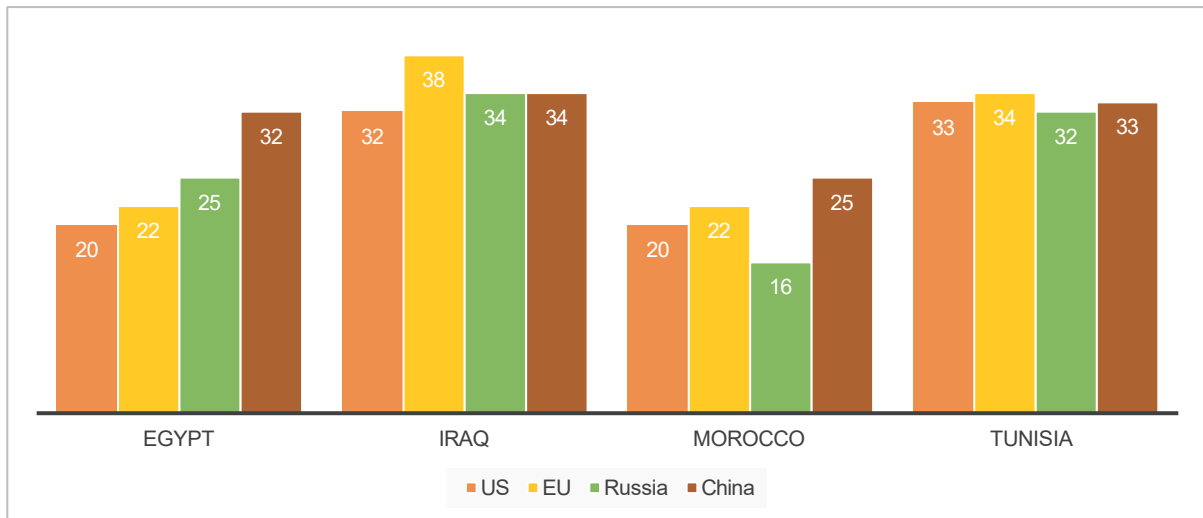
As for Egypt, the results of the Arab Trans survey diverge from Gallup: in 2014, 42 per cent of respondents approved China leadership, 25 per cent Russia leadership, 22 per cent EU leadership, and 20 per cent US leadership. Since 2009 approval of China leadership has ranked first, while the EU has maintained the third position after the US in the period 2009-2013, and after Russia in 2014. These results may point out a sort of negative perception towards Western traditional posture and influence within the country after the Arab uprisings, favouring country such China, with more vested interests in economy rather than politics, or Russia, recently returned within the region.

Gallup survey's results on the EU leadership confirm that, in 2014, 38 per cent of respondents in Iraq approved it. This figure is in line with the result of the Arab Trans survey. At the same time, it shows that, although the approval of the EU leadership is the highest when compared to the leadership of other external players (US, Russia and China), there were considerable fluctuations since 2010. While in 2010 53 per cent approved the EU leadership, this figure decreased to 33 and 32 per cent in 2012 and 2013, and slightly went up again in 2014. During the period 2010-2014 respondents preferred the EU leadership to the US one. However, in 2011-2013 the China's leadership obtained more approval than the EU.

As for Morocco, while the EU was considered as a factor of stability (57.3 per cent, Arab Trans), only 22 per cent approved the EU leadership in 2014 (Gallup). In the same year, China leadership was supported by 25 per cent of respondents. Although the approval of the EU leadership increased by 8 per cent respect to the previous year, there was a substantial decrease if compared to 2010 (39 per cent), 2011 (48 per cent) and 2012 (33 per cent). Nonetheless, when compared to the other external players (China, Russia and US), during the period 2010-2013 the EU ranks first. Similarly, with the previous results, Moroccans' perceptions towards the EU positively mirrors Brussels' commitment towards the country, which proved to be more interested than other Mediterranean partners in cooperating with the EU and in deepening bilateral relations in the framework of the ENP.

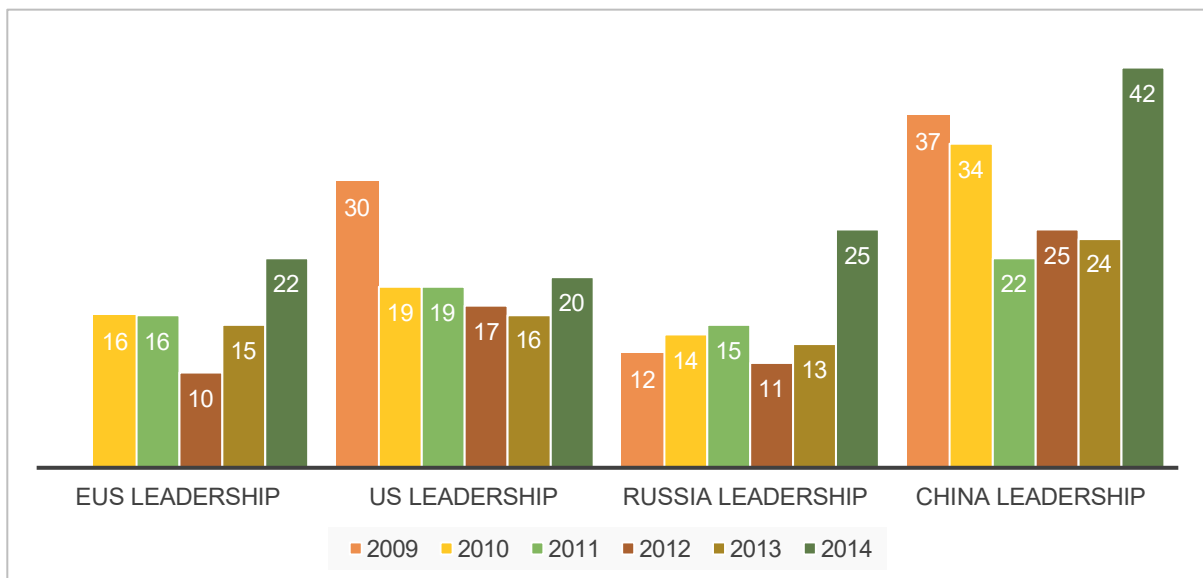
Finally, as for Tunisia, the data point out that the level of approval for the EU's leadership strongly decreased during the first year of the Arab uprising, going from 46 per cent in 2010 to 22 per cent in 2012. At the same time, since 2012 the EU seems constantly recovering its traditional prestige, so that in 2014 it has reached the 34 per cent of approval. Similarly, China and Russia has experienced the same trend, with a decrease from 2010 to 2012 and then a recover during the following years. Regarding US, although the country has generally the lowest level of approval, it has experienced an almost constant improvement, going from 19 per cent in 2010 to 33 per cent in 2014.

**Figure 30: Attitudes to world and regional powers in 2014, % approving of leadership**



Source: Gallup Analytics

**Figure 31: Egypt - Attitudes to world and regional powers in % approving of leaders 2010-2014**



Source: Gallup Analytics

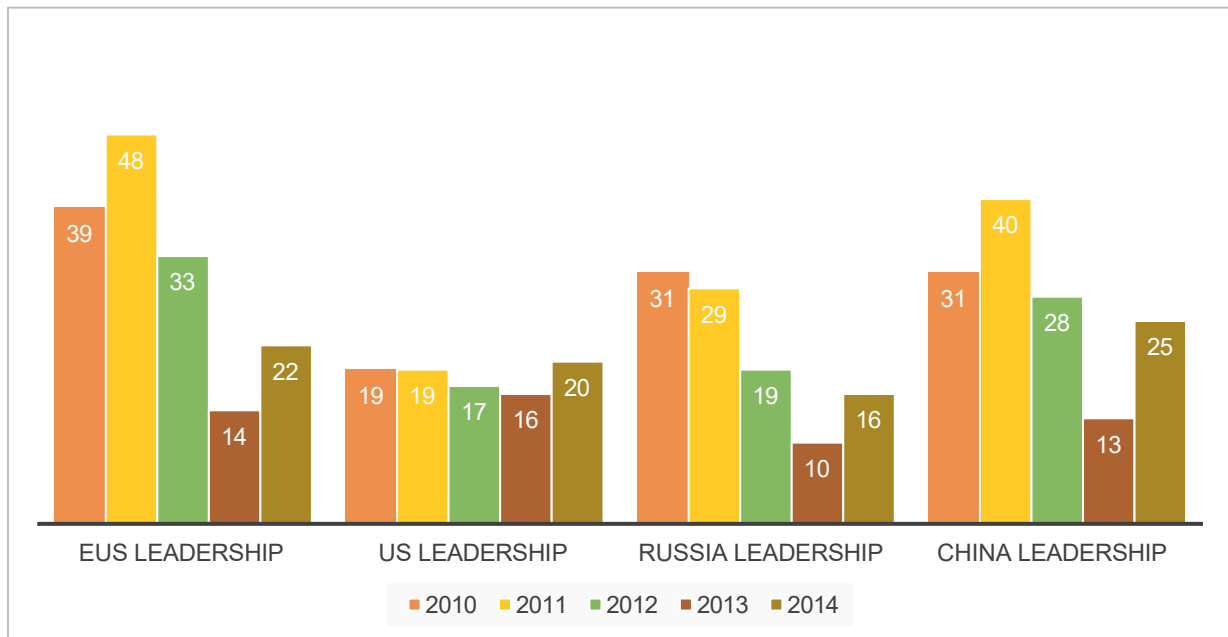


**Figure 32: Iraq - attitudes to world and regional powers in % approving of leaders 2010-2014**



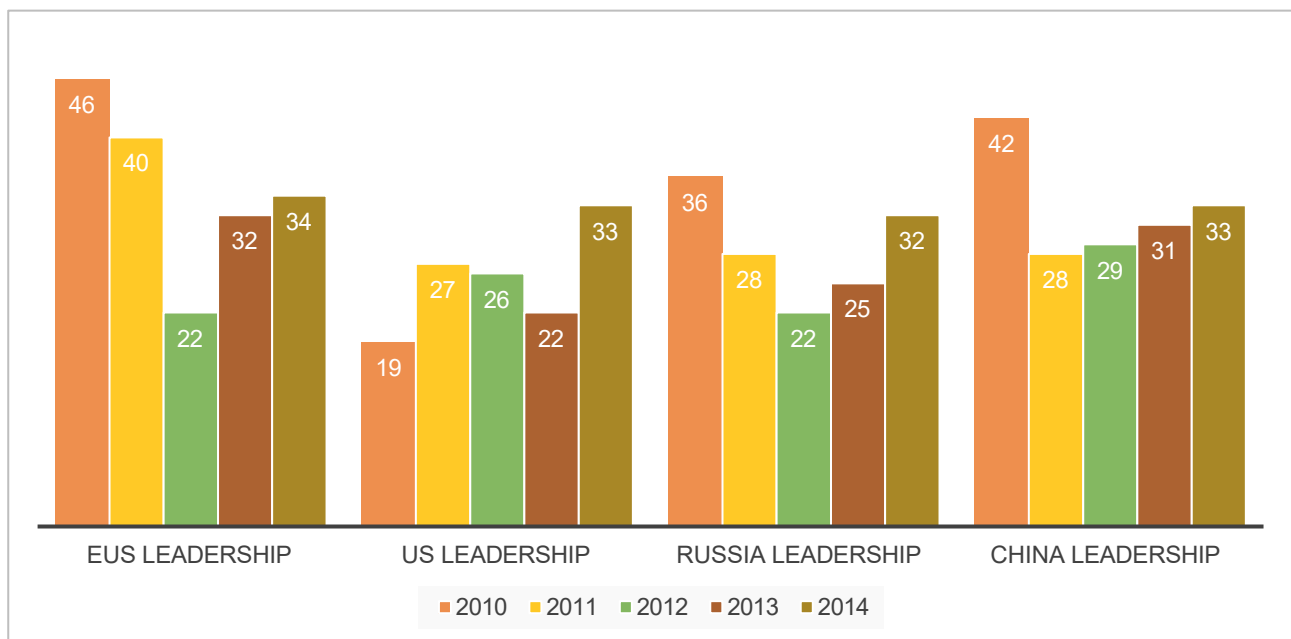
Source: Gallup Analytics .

**Figure 33: Morocco - Attitudes to world and regional powers in % approving of leaders 2010-2014**



Source: Gallup Analytics

**Figure 34: Tunisia – Attitudes to world and regional powers in % approving of leaders 2010-2014**



Source: Gallup Analytics.

#### Low Demand for Closer Ties

In a subsequent question on the Arab Trans survey, respondents were asked what country they would like their country to have better relations with in order to improve their own conditions. Again, this question is not particularly informative except probably as a proxy for political opinion about a particular country. What is striking is that, with few exceptions, public opinion across surveyed states has little appetite for increasing foreign relations at all, although most EU member states come out particularly low in rankings.

Just over 10% of Jordanians said that there was no state they wanted their country to have closer relations with, and a quarter of Egyptians, 14% in Tunisia, 6% in Morocco, and 3% of Jordanians said they 'did not know' which countries to have closer relations with to improve their national predicament. No EU member state was nominated by Egyptian respondents, and in Jordan only 1% nominated an EU country, namely Sweden. Moroccan and Jordanian respondents were more likely to nominate EU countries, which is in line with their more positive view of the EU and its role in their countries, as well as the EU's more long-standing and financially substantive commitment to those countries. However, in total, just over a fifth of Moroccans and of Tunisians nominated an EU member state: the most frequently mentioned was France, Tunisia's former colonial power, but also an important development partner. By contrast, the UK scored less than 2% in all surveyed countries, while Germany scored 2.5% in Iraq, 6.2% in Morocco, and 5.1% in Tunisia.

This most likely reflects a regional 'fatigue' with external intervention, as the Middle East generally is one of the world regions historically most subject to such interference.

The notable exception is Saudi Arabia, which was mentioned by 52% of Egyptians, 38% of Jordanians, and 12% of Libyans.

Another pattern – albeit rather weak – appears to be proximity: over 12% of respondents in Tunisia wanted closer relations with Algeria, 18% of Libyans wanted closer relations with Egypt, 11% of Iraqis looked to Iran while 13% looked to Turkey. On the other hand, 12.5% of Moroccans wanted closer ties with the USA, and the UAE was favoured by 12.7% of Iraqis and 11.2% of Jordanians.

Notably, of the countries respondents *didn't* mention, Italy stands out: no Egyptians wanted closer relations with Italy, despite the latter being Egypt's single largest European commercial partner, and one of the 'big four' and founding member of the European Union. Indeed, Italy scored above 1% only in Tunisia, with which it has had historical ties.

**Table 1: State your country should strengthen its relations with (%)**

	Egypt	Iraq	Jordan	Libya	Morocco	Tunisia
Algeria	0.2	0.2	-	2.1	5.8	12.6
Australia	-	1.4	0.1	-	0.2	0.1
Canada	-	0.9	0.1	-	2.9	0.7
China	1.4	4.8	0.9	1.5	7.5	2.2
Egypt	-	2.6	3.7	18.3	0.4	0.1
France	0.3	2.4	0.1	1.1	8.9	13.7
Germany	0.4	2.5	0.8	1.0	6.2	5.1
UK	0.3	1.9	0.7	1.4	1.9	1.4
Iran	0.1	11.2	0.5	-	2.0	0.3
Iraq	0.1	-	2.4	0.1	-	0.1
Italy	-	0.7	0.1	0.4	1.2	2.5
Japan	0.5	5.1	0.7	1.1	5.0	1.6
Jordan	0.3	3.0	-	3.6	0.1	-
Kuwait	2.2	2.7	4.1	1.5	0.3	0.2
Lebanon	-	3.2	0.2	0.3	0.1	0.1
Libya	1.2	-	0.1	0.1	0.2	6.3
Morocco	-	0.4	-	3.6	-	5.9
Qatar	0.9	2.2	3.7	1.9	3.9	4.5
Russia	3.1	3.8	0.3	0.9	3.3	1.8
Saudi Arabia	51.6	5.8	38.2	12.1	5.3	6.3
Spain	-	0.7	-	-	2.1	0.7
Sweden	-	0.7	0.1	0.2	1.8	0.2
Syria	0.2	0.7	2.0	0.3	0.2	0.1
Switzerland	0.1	0.2	-	0.1	1.0	1.5
Tunisia	0.3	0.6	0.1	7.8	0.7	-
Turkey	1.1	13.0	4.4	4.9	12.5	5.8
UAE	8.6	12.7	11.2	5.3	4.2	4.5
USA	1.1	4.9	6.6	4.6	12.5	6.2
Palestine	0.3	-	3.6	-	0.9	0.2
No state	-	-	10.6	-	-	-

Source: Arab Trans, 2014. Note: 24.4% of respondents in Egypt, 7.6% in Iraq, 3.2% in Jordan, 23.5% in Libya, 5.5% in Morocco, and 14.2% in Tunisia have not provided valid answers

Respondents were then asked a follow-up question specifically on European states, namely to identify which European state they would like to strengthen relations with. As for the preceding question, it is unlikely that in most cases respondents will be familiar with the logic and details of the policies of these states towards their countries, and as such responses are probably better understood as general indications of the reputation these states have amongst respondents. In addition, there are very high levels of non-response rates (don't know/refuse to answer) from a low of 32% in Iraq to a high of nearly three quarters in Egypt. This is particularly noteworthy because respondents were given a 'no country' response option.

Amongst the remainder, most respondents have little appetite for closer relations with EU member states. Perhaps worryingly, majority of respondents in Egypt, Jordan and Morocco did not nominate *any* EU state: in Egypt 73 per cent of respondents said they did not know, in Jordan 11 per cent said none, and a further 48 per cent that they did not know, in Morocco 41 per cent said they did not know, as did 59 per cent in Tunisia. What is also puzzling is that France – which in Morocco and Tunisia had been most frequently nominated amongst EU states in the previous open question – is not nominated at all. Germany is the most frequently nominated EU country by some margin (25% in Morocco, 22.8% in Tunisia, 17.1% in Jordan, 14.6% in Iraq, and 6.7% in Egypt). The UK receives above 10% in Iraq (12.9%), Jordan (15%) and Libya (12.7%).

Egyptian public opinion stands out as consistently shunning European states, with only Germany scoring above 2% (Italy and the UK receive 1.6% and 1.5%) at 6.7%, but even then outstripped by Russia at just under 15%.

Beyond this, the only countries to score above 5% are Spain in Morocco (10.2%), Sweden in Iraq (8.1%), and Italy in Iraq (6.3%) and Tunisia (10%).

Overall, there appears to be very little evidence of popular support for the idea of closer relations with EU member states, which is likely a reflection of the lack of confidence these and the EU as a whole inspire in the general population.

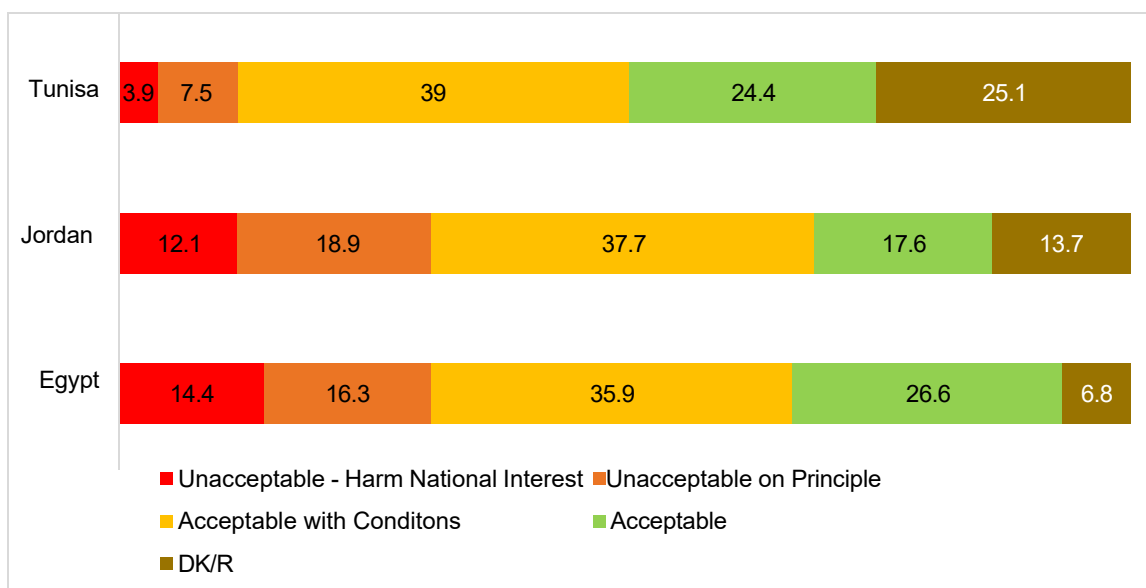
**Table 2: European state you think your country should strengthen its relations in order to improve the current conditions (%)**

	Egypt	Iraq	Jordan	Libya	Morocco	Tunisia
Belgium	0.2	1.9	0.1	0.3	1.9	0.5
UK	1.5	12.9	15.0	12.7	5.6	0.2
Austria	-	1.2	0.3	0.3	0.1	0.2
Denmark	-	2.0	0.2	0.2	0.2	-
Germany	6.7	14.6	17.1	5.9	25.0	22.8
Italy	1.6	6.3	2.1	9.4	3.8	10.0
Netherlands	-	4.5	0.2	0.6	0.9	0.2
Spain	0.4	3.4	1.2	2.0	10.2	1.6
Sweden	0.5	8.1	2.5	0.6	2.5	0.3
Switzerland	-	3.4	1.5	1.9	2.0	5.0
Russia	14.9	6.5	-	-	1.9	-
No country	-	-	10.6	-	-	-

*Source: Arab Trans, 2014. Note: 73% of respondents in Egypt, 32.2% in Iraq, 48.4% in Jordan, 64.9% in Libya, 41.1% in Morocco, and 59.3% in Tunisia have not provided valid answers.*

It should be noted that in a separate question, respondents displayed various degrees of openness to outside influence at least partly/in principle in relation to carrying out reforms so one can reasonably infer that they are not opposed to foreign relations *per se*, but that their expectations of what such ties might achieve and what foreign powers' intentions are would influence their opinion of those states and their position regarding the desirability of closer ties with them.

**Figure 35: Extent to which External Demands for Reform are acceptable (%)**



Source: ArabBarometer III.

### 5.3.2. Perception of the Domestic Context

The ArabTrans survey also contains questions pertinent to the domestic security context, specifically questions focusing on concerns about national security (Q7), war, terrorist attack, civil war (Q16), and the government’s performance on security matters.

Asked to evaluate national security at the point of the survey, it is perhaps little surprise that Iraq and Libya displayed the highest proportion of those regarding it as bad (just above three quarters). What is striking is that Tunisians are not far behind Iraqis and Libyans, with two thirds of respondents rating the security situation as bad, and only 5.7% as good (roughly the same as in Iraq). Although Tunisia has experienced some notorious and spectacular terrorist attacks and political assassinations, these are clearly not on the same scale as either Libya or Iraq: this should not be taken as dismissive of Tunisians’ perceptions, but rather as an indication of just how strong their concern is about the country’s security situation, specifically extremist Salafi group’s ability to carry out violent attacks.

The countries in which respondents feel the security situation is best are Morocco and Jordan. Although Morocco’s presence in Western Sahara continues, this has not translated into a problem for internal stability outside those territories. Jordan’s results are perhaps more surprising given the destabilisation of both Iraq and Syria, and the impact in terms of refugees that this had on the country. Particularly after the brutal murder of a Jordanian pilot by Da’esh/ISIS, Jordan seems to have avoided instability, although the toll that the massive refugee influx has on its economy is considerable, and as such there remains a significant potential for destabilisation. This is perhaps reflected in the higher ratio of ‘bad’ to ‘neither good nor bad’ in Jordan compared to Morocco: in Morocco, nearly 42% of people think the

situation is 'neither good nor bad', whereas in Jordan only 26% give this response, while nearly 22% state it is 'bad' (compared to 15% in Morocco). Finally, Egypt, where internal security is seen as the 'main challenge' for the country, has perhaps the most polarised position: nearly 27% believe the security situation is good, just over 30% believe it is bad, but over 42% think it is neither. Overall, the data seems to suggest that respondents view their countries' security situation as precarious to some degree: only in Jordan do a majority of respondents believe it is good – and a very slight majority, at that – and where there is not outright conflict (Iraq, Libya) there is either considerable worry (e.g. Tunisia) or at least not enough confidence to rate it as 'good' (e.g. Morocco and Egypt at 42% 'indifferent').

**Figure 36: Overall Security of the Country Today (%)**



*Source: Arab Trans, 2014.*

When respondents are asked about their concerns about specific security threat types – namely whether they are worried about a war involving their country, a terrorist attack, or civil war – two countries' responses immediately stand out.

First, Tunisia's concern for destabilisation is borne out, with just over 60% of respondents worried about either war or civil war, rating only marginally lower than Libya's when it that country is actually undergoing a civil war. Tunisians are even more concerned about terrorist attacks specifically, at over 80%. To put this into context, this is slightly higher than even Iraq, which has experienced a greater number and intensity of such attacks.

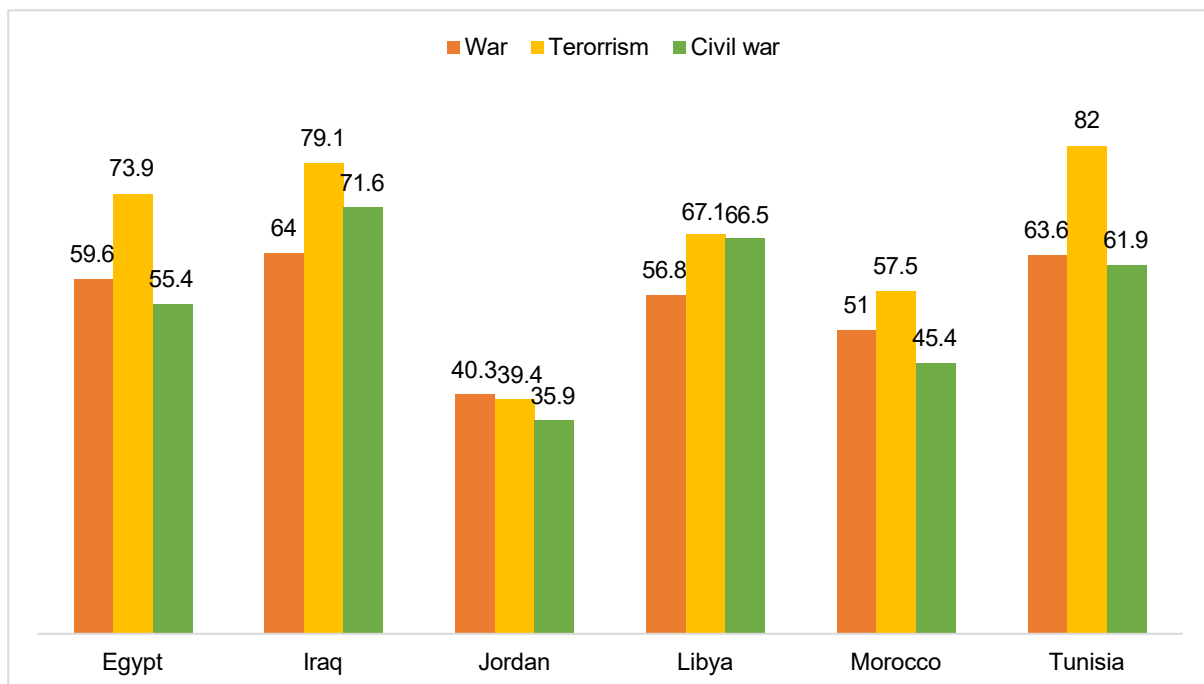
Second, Jordan's responses are remarkably sanguine compared to other countries – notably Jordan – since although Jordan has not experienced terrorist attacks as Tunisia has, it is in a notably more precarious position with both Syria and Iraq as highly destabilised neighbours and – particularly at the time – a significant threat from Da'esh/ISIS.

Indeed, taking Iraq and Libya as meters of ongoing civil war and unrest, Egypt's results are also strikingly high, particularly given their ratings of national security and their trusting



response in the government's performance in this respect. Between 55% and 60% of Egyptians are concerned with civil war and with war – although what the objective sources of such conflicts might be is difficult to discern – and nearly three quarters are concerned about terrorism. While the country did experience some attacks in the 2013-14 period, this level of concern puts Egyptians only just after Iraqis. This concern, which Egyptians share with Tunisians, may well have to do with factors other than objective security threats. This being said, Egyptians' responses on these questions do chime with their identification of national security as one of the two major challenges for their country.

**Figure 37: Worried about war, terrorism, or civil war (%)**



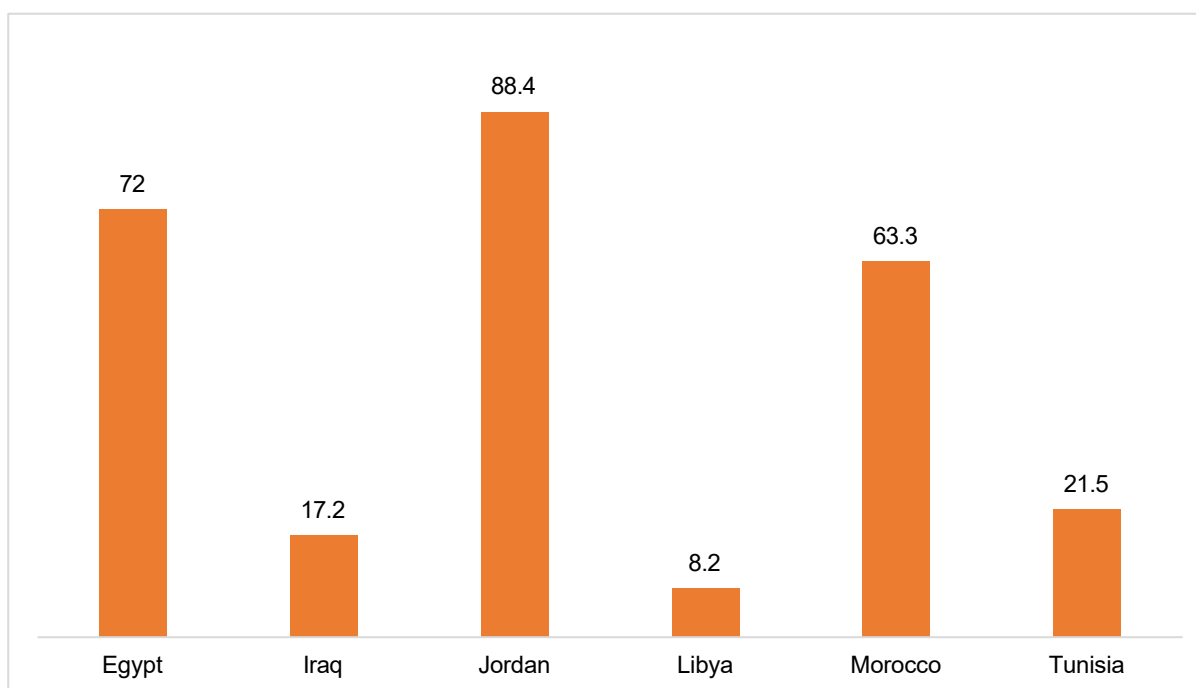
*Source: Arab Trans, 2014.*

Finally, ArabTrans includes a question about the government's performance in the provision of security. Responses to this question provide some context for and explanation of results for the previous two questions, making it possible to compare respondents' perception of the problem against their perception of the government's performance in dealing with that problem.

Jordan and Egypt stand out as having the highest opinion of their respective countries' provision of security (88.4% and 72% respectively). It should be said that Egypt faces a less challenging security context, with only North Sinai posing a significant (albeit highly localised) problem. It is not clear why, if nearly three quarters of Egyptians are confident government security provision is good or better, so many Egyptians identify security as the country's main challenge. Morocco follows with just under two thirds of respondents rating government performance as good or very good, while Iraq and Libya again predictably score low, with only

17.2% and 8.2% respectively. Tunisia again returns a result which is cause for concern: only barely above one in five of Tunisians (21.5%) rate government provision of security 'good' or better, suggesting a widespread dissatisfaction which tallies with Tunisians' low rating of their national security and their high levels of concern for terrorist attacks in particular. Taken together, these results suggest that the government have still a considerable way to go to reassure the population that the threat from extremists is being dealt with.

**Figure 38: Evaluating Government's Performance in providing Security in the Country as 'good' or 'very good'**



## 6. Conclusion

This report has provided an overview of public opinion perceptions in the countries surveyed by the ArabTrans project in three major areas: 1. the perception of the EU and its policies, of respondents' awareness of the Union and their evaluation of its ability to respond appropriately to the challenges posed by the Arab Uprisings; 2. The perception of the EU's role as a 'normative actor' committed to supporting democracy in the region; 3. perceptions of the context within which international actors such as the EU must design and implement policy, focusing on local populations' perceptions of the major challenges their countries face, including the regional and domestic security contexts.

In brief, while there are windows of opportunity for the Union and its Member States in the region, these require a re-evaluation of the design and implementation of Neighbourhood Policy to adapt to demands from populations and thus help address the root causes of socio-economic dislocation and political mobilisation which lead to the Uprisings.

Survey data suggests a considerable disjoin between the intentions behind EU policy and the perception of challenges and priorities in MENA public opinions. This disconnect is likely to be at the root of the poor reputation the EU enjoys amongst respondents at large. However, this is not simply resolved by spreading better awareness of existing EU actions: programmes themselves must change and adapt to pressures from populations. The Uprisings were driven by a demand to address the socio-economic dislocation produced by economic reforms, a demand most occasioned by the simultaneous political marginalisation people have felt. It is no coincidence that popular demand for EU policy action focuses precisely on issues of fairer economic development.

At a broad popular level, the EU as an actor and its member states currently receive little popular sympathy. However, there is a degree of willingness to accept outside influence on reform if it matches populations' priorities. Survey data consistently points to the need to address socio-economic conditions, and to the fact that while MENA populations surveyed are indeed open to democracy, the EU's focus on procedural aspects is not enough, nor is the 'market democratization' approach at the heart of its economic model. If the EU and its Member States are able to grasp the opportunity to change policies to effectively respond to the demands manifested during and after the Uprisings, this may create a window of opportunity for change in the region.

The greatest cause for concern is that the failure to address such structural causes of unrest is likely to erode the stability – and thus security – of national social compacts, with potentially serious implications both at national and regional levels.

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# Appendix:

## Gender and EU Policy in the MENA Region

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As a response to the Arab Uprisings, the European Union reaffirmed the centrality of human rights for its policy priorities for External Action, with a particular centrality assigned to women's rights. The EU's *New European Neighbourhood Policy* (High Representative for Foreign Affairs and Security Policy and European Commission, 2015) includes a clear focus on gender equality and women's rights promotion, which are seen as essential for building sustainable democracies, economic growth and social development across MENA. Central to this is increasing the participation of women in political and economic life (European Commission 2012). Before the Uprisings, gender and human rights were less frequently mentioned in Association Agreements (AAs), and although AAs did have a clause allowing for their suspension for human rights violations as part of their 'conditionality' provisions, this was never enforced (Robinson 2013). The revised ENP claimed to seek to address the difficulties with previous policy in two ways: first, by establishing the 'More for More' principle: unlike 'negative conditionality' which focused on punishing non-compliance and lack of progress (a stick), positive conditionality provided a 'carrot' in that faster progress on aid and trade would be provided where progress was made on democracy, rule of law, fighting corruption and security, law enforcement reform (including establishing democratic control over the judiciary and security sectors) and gender equality.<sup>14</sup> However, in practice, sanctions for not making progress (negative conditionality) remain unlikely to be imposed, as the EU and its Member States take the view that this would mean the possibility of local populations being hurt with no gain (Robinson 2013). In addition, it should be noted that both negative *and* positive conditionality provisions were present in pre-Uprisings EU policy (see D9.25), making it unclear how effective the incentives offered by such a 'carrot' will ultimately be in the post-Uprisings framework, unless the Union takes a more assertive position on the operationalization and application of conditionality clauses.

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<sup>14</sup> Gender was added after protests were made at its exclusion (Euro-Mediterranean Human Rights Network 2012).

Gender equality is a founding principle of the EU, one of its 'fundamental values', and a consistent part of the EU's definition of democracy, with the promotion of women's political rights as well as equality in education and in employment opportunities and gender mainstreaming seen as key policy objectives. The EU is a policy entrepreneur positioning itself as a normative power committed to core values of democracy and human rights, which it mainstreams in all its policies. It wishes to exert international influence by example and specifically by exporting the norms and values it sees as embedded in the fabric of the EU itself. By doing so, the EU aims and claims to advance a universal common set of beliefs and attitudes to democracy and human rights – including women's rights – that is accepted as commonplace, taken for granted as normal and natural (Manners 2002). This is the rationale behind the EU's commitment to including a gender dimension in all policy areas, including external relations.

The EU views itself as an international leader in promoting equality and equal opportunities in its foreign policy and more generally transnationally. In implementing goals, it claims to do so in line with its own foundational values, its own gender regime and that gender is mainstreamed in own policies and programmes. Walby (2004) argues EU has a distinctive gender regime with non-economic issues in gender equality linked to economic ones. This system claims to challenge both the male breadwinner model and gender inequalities in all areas of social, economic and political life together was a model of social inclusion that recognises difference within a framework of equality. Walby suggests that this is worthy of exporting to other countries and regions. However, it has been argued that the EU takes a paternalistic approach to gender equality, and sees it as a problem of the MENA countries rather than a shared problem. Gender inequality is reduced to being symptomatic of a backward 'culture and tradition' (Junemann, 2013; Kunz and Maisenbacher 2015). Consequently, women are constructed as passive, backward, and needing EU support, thereby providing a space for European women feminists to build the capacity of MENA women, and for European men to teach MENA men how to respect women. In the process, local women's voices are silenced, and the opportunity to build common cause by using the *Convention on the Elimination of All forms of Discrimination Against Women* as a shared benchmark for measuring progress towards gender equality is consequently lost. The EU fails to recognise (acknowledge) that gender equality is a shared problem that can be worked on together and instead tells Arab women they have to become like EU women because EU norms are 'correct', universal.

However, in practice the EU tends to take a Realist approach to gender equality and the promotion of women's rights, reducing its credibility with local populations and so having little ability to affect change (Balfour-Paul 2011; Robinson 2013). A distinction needs to be made between the EU '*being*' and '*doing*' what it is and what it does in its foreign policy (David and Guerrina 2013). The EU fails to promote gender equality when it is not in line with its primary policy objectives (Guerrina and Wright 2016). Its promotion of gender equality and women's empowerment tends to be instrumental, supporting what the EU considers to be its primary objectives, namely security, development and internal stability across the region. Women are seen as key players in the fight against extremists; as essential to democratisation, as building stable democracies requires gender equality; and as central to economic growth, as gender equality is seen as 'smart economics'. So rather than promoting gender equality and women's empowerment on gender justice grounds, the EU does so on instrumental grounds. Furthermore, gender tends to be seen as synonymous with women and girls (Guerrina and Wright 2016) downplaying the role of men and the importance of working with boys and men if gender equality and the empowerment of women is to become a reality, not to mention non-binary/non-heteronormative gender identities.

In practice, conventional understandings of and approaches to security concerns and to economic ties dominated EU decision making before the Uprisings and have returned to dominate the agenda five years after the Uprisings, meaning that the EU has supported authoritarian regimes and lost whatever credibility it ever had with local people. One problem is that while the EU claims to gender mainstream all its policies, it promotes trade agreements and economic reforms that are exploitative of women and do not create the type of decent jobs that provide decent employment for women, including young women reduce female unemployment and encourage women to enter the labour market. Conventional approaches to security mean that Islam and Islamic cultures are seen as a threat or at least as a potential source of threat. This has meant that the EU has tended to only work with self-proclaimed secular organisations, but secular feminists are often identified with old regimes – sometimes co-opted by the regimes and other times directly sympathetic to those regimes –, are mainly middle class and educated (Junemann 2013) and thus often out of touch with popular concerns. Islam offers a framework within which to legitimise values and approaches alternative to those Western values and cultures associated with political domination such as the EU is perceived as exercising. Unfortunately, the EU has not engaged with Islamists generally and Islamic feminists in particular because of its reluctance to engage with political Islam, thereby

missing the opportunity to work with women's groups that are more likely to be able to influence popular attitudes and challenge discriminatory policies. Also building on the communalities of secular and Islamic feminists rights activists by encouraging dialogue and working on issues that they are agreed on using ideas of 'dignity' 'fairness' and 'justice'.

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