



Next Generation Democracy

Middle East and North Africa

(not including Israel, Palestine & Turkey)

Track 1 - People and Communities

Regional Trends 2000-2015 & Scenarios 2015-2030



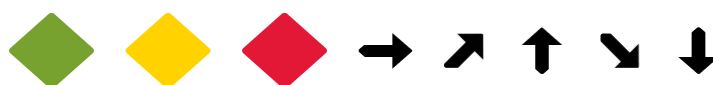
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NOTE TO THE READER

NGD regional reports for Track I, 'People and Communities' analyze trends and projections in democratic governance from a predominantly socio-political perspective on the basis of a multidimensional template specifically formulated by the Club de Madrid, with the collaboration of the Bertelsmann Stiftung, for this purpose.

NGD regional reports have been written by the Bertelsmann Transformation Index (BTI) Regional Coordinators and extensively discussed with the BTI team, the CdM Secretariat and NGD regional partners. They constitute the first step of the NGD process, which will progressively organize transformative practices and ideas according to the same template, and subsequently draft NGD regional agendas to react to signals of democratic decline and advance democracy worldwide.

NGD regional reports start with a summary of regional indicator trends according to the NGD template. The summary includes colored boxes and arrows expressing the present state of affairs and the evolution during the last 15 years of democratic governance for each relevant indicator. The sources for trend calculations are the BTI and the Sustainable Governance Indicators (SGI), also developed by the Bertelsmann Stiftung.



Indicator boxes are colored to differentiate between the most recent state of affairs for each regional indicator (BTI/SGI 2014). Green, yellow and red respectively indicate 'high level', 'medium level', and 'low level' in relative quality. Levels for each regional indicator are based both on inter- and intra-regional averages, thus the indicator boxes highlight the relative strengths and weaknesses of a region, but also indicate how well the region is scoring on a global scale.

Trend arrows express whether the situation improved or worsened during the last 15 years. The indicator boxes contain five types of trend arrows, signaling 'significant improvement', 'improvement', 'continuity', 'decline', and 'significant decline'. The positive or negative trend reflects changes of averages above or below a certain threshold (which varies according to the size of the country sample) in the respective regional indicator. Changes of more than double that threshold form a significant trend.

The combination of colors and arrows thus shows whether a given change, and the speed of it, is observable from a low or high starting level. In the former case, a positive trend means that modest change has occurred during the past years in a situation which remains problematic. In the latter case, depending on the speed of change, a positive change may indicate that an already high status is being further improved. In case the trend is negative and the present state of affairs is of a low quality, regression is taking place in spite of a problematic situation. Finally, negative trends against a high quality background indicate potential decline in deep-rooted aspects of democracy.

For a detailed explanation of the calculations, see NGD Methodological Note at:
www.nextgenerationdemocracy.org



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The NGD Regional Report (Track I) for Broader MENA has been written by Jan Claudius Völkel, visiting professor and DAAD long term lecturer of political science at Cairo University and BTI Regional Coordinator for the Middle East and North Africa Region.

This report benefitted from the feedback of Lina Khatib, Director of the Carnegie Middle East Center, Beirut.. The edition was made by Luis Peral, Senior Analyst, Club de Madrid.

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Middle East and North Africa


(not including Israel, Palestine & Turkey)

Track 1 – People and Communities

Values and Institutions

Access and Inclusiveness

Management and Policies

Trends 2000 – 2015		Projections 2015 – 2030
Political participation		
Electoral process Though improved since 2011, elections are still meaningful only in Kuwait, Lebanon and Tunisia; Libya, Syria and Yemen are too fragile for meaningful polling, while the Gulf states are governed by autocratic rule without broad political participation (except Kuwait).		<ul style="list-style-type: none">Political participation will remain hindered by autocratic regimes that gain new strength as a result of increased turmoil in former Arab Spring countries.Meaningful elections will remain exceptions, and opportunities for free expression of opinion rare; activism outside official channels will be confronted with harsh suppression.
Association/assembly rights These rights are accorded little overall respect. Egypt has experienced a dramatic setback since 2013.		
Freedom of expression The freedoms of media and opinion are realized satisfactorily in a few countries (Kuwait, Lebanon), but are undermined by civil-war violence (Iraq, Libya, Syria, Yemen) and political interference elsewhere.		
Rule of law		
Separation of powers The political sphere is often monopolized by executives; parliaments only play a minor role, except in Kuwait, Lebanon and Tunisia.		<ul style="list-style-type: none">Governments will remain dominating and beyond parliamentary control; they will often base their power on military support.The rule of law remains sporadic, as many judges use their work in support of the regime.Civil rights, particularly for women and prisoners, will remain limited; conditions for religious minorities will deteriorate in war areas, but autonomous regions may offer shelter, particularly in Syria and Iraq.
Independent judiciary Judges and lawyers support the regimes in their crackdown against dissidents, many also lack professionalism.		
Civil rights Personal integrity, due process and equality before the law are not guaranteed in most countries, particularly with regard to women’s rights. The war-like violence in some countries has led to further severe abrogations. Torture of prisoners is common in most countries.		

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Trends 2000 – 2015		Projections 2015 – 2030
Political and social integration		
Party system Multiparty systems are developed in only a very small number of countries, and the influence of parties is minimal.		<ul style="list-style-type: none">• Aside from Tunisia and perhaps Lebanon, political parties will not gain more influence; rather, they are sidelined by the regimes, and often have a bad reputation among the population.• Economic downturn will polarize societies further, making any improvement in low levels of social capital unlikely
Interest groups Though often appreciated as an alternative to political parties, grassroots organizations are constrained in activity and growth by legislative restrictions.		
Social capital Social capital is weak and usually relates to tribal or ethnic bonds. Many upper-class citizens live in guarded communities, and do not care about poverty or society at large.		
Inclusiveness and non-discrimination		
State identity State identity is often subordinate to tribal, ethnic, religious, or class affiliations.		<ul style="list-style-type: none">• If economic progress does not comprehensively and permanently reach broader section of society, barriers to participation will remain high.• Population growth remains a central socioeconomic problem in most countries of the region, and will continue thus for the foreseeable future.
Socioeconomic barriers Particularly in the former socialist republics, wide swaths of society are structurally excluded from economic progress; in the Gulf countries, the precarious situation of blue-collar migrant workers is worrying.		
Equal opportunity Multiple societal cleavages mean high barriers for members of minority groups. But women too face discrimination in many countries of the region.		

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Trends 2000 – 2015		Projections 2015 – 2030
Strategic capacity and efficiency		
Prioritization Economic strategies are high on most governments' priority lists, but political liberalization measures are not.		<ul style="list-style-type: none">• Due to the increased terrorist threat from certain Islamist groups, security will be the dominant interest for governments in the region, a factor that will prevent more political opening.• Effective capacity development cannot be expected as long as national education systems remain inadequate.
Implementation Due to lack of competence or political will, implementation success is low in most countries. Corrupt stakeholders further reduce project realization.		
Efficient use of assets With poor education systems, most countries lack a competent administration; non-transparent recruiting systems often allow staff to be hired using kinship criteria rather than skills.		
Anti-corruption policy Fighting corruption has become a frequent task for all governments, however, results are often unsatisfying results, and abusive practices common.		
Consensus-building		
Cleavage/conflict management Conflicts are often exploited by governments to attain specific targets. In many cases, governments are even among the parties engaged in conflict.		<ul style="list-style-type: none">• Autocratic governments will continue using conflicts to legitimize their hard-line policies• Civil society's activities will remain limited to non-sensitive areas such as environmental protection
Civil-society participation Civil society mostly lacks any influence on decision-making. If grassroots action occurs, it is mostly on the local level.		

Introduction

The Middle East and North Africa region is the world's democratic underachiever. Eight hard-line autocracies and seven moderate autocracies dominate the area's political character, compared to just two defective electoral democracies (Iraq, Lebanon) and one country on the track to liberal democracy (Tunisia).

Three historic contributors to the region's weak democratic standards – and thus to the widespread level of autocratic rule – can be identified: First, the abundance of natural resources, particularly around the Persian Gulf, has long bolstered rich ruling elites and helped to quell any political unrest. Second, the revolutionary wave directed against European occupiers and domestic royal families from the 1950s to 1970s (Algeria, Egypt, Iran, Iraq, Libya, Tunisia) elevated military leaders into top political positions. Thereafter, the permanent state of conflict with Israel coupled with perceived internal Islamist threats lent military rulers broad legitimacy. Third, specific understandings of the role of religious dignitaries within society have given the royal families in Jordan and Morocco (which both cite family roots reaching back to the Prophet Muhammad) and Saudi Arabia (as guardian of the holy sites in Mecca and Medina) an almost intangible position of strength.

From that perspective, the region's decades-long resistance to democratization has become almost proverbial. Even the slight opening tendencies induced in the early 2000s primarily through U.S. and EU pressure failed to lead to more democracy, but were rather abused by rulers to further affirm their leadership. Many of the region's countries developed into “façade democracies” at that time, while retaining their autocratic core. Real change did not take place, a fact accepted by Western powers as the price for regional stability.

Hence, it prompted immense surprise and astonishment both within and outside the region when demonstrating masses forced long-term dictators Ben Ali, Hosni Mubarak, Muammar al-Qadhafi and Ali Abdallah Salih out of office in 2011. However, the democratic balance following these Arab Spring upheavals is mixed at best: in fact, the region as a whole improved only slightly with regard to its political transformation path from 2012 to 2014.

In the wake of the Arab Spring, only Tunisia has been newly listed as being on the path to democracy. Algeria, Egypt and Libya have made improvements, but still fall short of minimum standards in the area of citizen rights, leaving them part of the “moderate autocracies” group. Those few (yet remarkable) improvements have been countered by massive deterioration in Bahrain, Libya, Oman, Sudan, Syria and Yemen, with the latter two countries now listed by the BTI as states with failed transformation (in companionship with Iran and Sudan).

Values and institutions

Regional overview

Values and Institutions		Political Participation				Rule of Law			
			Free and fair elections	Association / assembly rights	Freedom of expression		Separation of powers	Independent judiciary	Civil rights
Lebanon	6.67	7.0	7	8	6	6.3	6	6	7
Tunisia	6.17	7.0	8	7	6	5.3	6	5	5
Egypt	5.67	6.3	7	6	6	5.0	6	6	3
Kuwait	5.33	5.3	4	6	6	5.3	5	4	7
Libya	5.33	7.7	8	8	7	3.0	4	3	2
Algeria	5.17	6.0	6	6	6	4.3	4	4	5
Iraq	4.83	5.7	7	6	4	4.0	5	3	4
Jordan	4.50	4.7	5	5	4	4.3	3	5	5
Yemen	4.17	5.0	4	7	4	3.3	3	4	3
Morocco	3.83	4.0	4	4	4	3.7	2	3	6
Qatar	3.83	3.7	2	3	6	4.0	2	4	6
Bahrain	3.50	3.0	3	3	3	4.0	4	4	4
UAE	3.00	2.7	2	3	3	3.3	2	3	5
Sudan	2.83	3.3	3	4	3	2.3	3	3	1
Iran	2.50	2.3	3	3	1	2.7	4	2	2
Oman	2.33	2.3	3	2	2	2.3	1	3	3
Saudi Arabia	2.17	1.7	1	2	2	2.7	1	4	3
Syria	1.83	2.0	2	2	2	1.7	2	2	1

Indicator Scores, Transformation Index BTI 2014

Note: Scores reflect the situation as of January 31, 2013.

The uprisings of 2011 have led to contrary effects across the Middle East and North Africa. **Egypt**, **Libya** and particularly **Tunisia** have made impressive gains regarding their citizens' political participation, and to a lesser extent, their rule of law. However, the latter issue has faced massive setbacks in **Egypt** (with deteriorations justified by authorities on the basis of the fight against terrorism) and **Libya** (mainly resulting from the stateness collapse in the aftermath of former leader Muammar al-Qadhafi's removal) after initially high hopes in 2011 and 2012.



However, the wave of uprisings has also led to deteriorations in countries where governments were more successful in resisting demonstrators. Setbacks were most dramatic in **Bahrain** and **Syria**, as well as in **Yemen**, where further erosion of rule of law occurred despite the 2012 change in presidents. The oil-rich Gulf monarchies **Qatar** and the **United Arab Emirates** also demonstrate mediocre performance, but score higher than **Saudi Arabia** and particularly **Oman**, which further restricted many political rights in response to the Arab Spring. **Kuwait** is a positive exception here, maintaining a relatively high level of political and civil-rights protection in what is nevertheless still an autocratic context.

A third group of countries is composed of non-oil-based monarchies that did not experience major changes after 2011, namely **Jordan** and **Morocco**. Both could be labeled as “stable mid-range players,” being neither particularly bad nor exceptionally good. Finally, **Iran** and **Sudan** remain at the low levels demonstrated throughout recent decades; even the split of **South Sudan** in 2011 failed to trigger any relevant policy adjustments in Khartoum.

All countries of the region suffer from a general underdevelopment in the rule of law. The Arab Spring brought certain improvements in terms of political rights in the North African countries from **Algeria** eastwards, but even in these countries, the rule of law still demonstrates major flaws. Hence, a future focus should be laid not only on political processes and organizations, but also on the protection of civil rights and the proper functioning of judicial institutions.

The map (above) illustrates the clear dichotomy in the region that was induced by the Arab Spring: While the uprisings brought considerable improvements particularly in North Africa (with the notable exception of **Morocco**), the other parts of the region remain at unsatisfactory levels, except for **Kuwait** and **Lebanon**.

In sum, democratic values and institutions are still underdeveloped across the region, even after the 2011 revolutions. Only **Tunisia** has made successful progress on the path to democracy, based on its relatively strong parliament and comparatively weak president, a very rare polity concept in a region where most states have an almost unrestrictedly powerful head of state (only **Lebanon** and, partly, **Kuwait** have a similar executive concept). Accordingly, trust in democratic institutions is rather low in all countries, a fact also expressed in low election-turnout rates. Recent events have exposed the deep rifts between secularists and Islamists, whose conceptions of power and legitimacy differ substantially. Stateness problems exist particularly in the countries affected by civil wars, particularly **Iraq**, **Libya**, **Sudan**, **Syria** and **Yemen**, but also **Bahrain**. Territorial disputes exist in **Algeria**, **Egypt**, **Iran**, **Morocco** and **Saudi Arabia**.

Analysis

Political participation

Electoral process

To what extent are political representatives determined by general, free and fair elections?

Elections play a meaningful role only in Lebanon and Tunisia. Vote rigging, unfair campaigning and ballot fraud prevail across the region. Though Libya had surprisingly free, fair and professionally conducted elections in 2012, the 2014 elections to the Constituent Assembly and the parliament were marked by participation rates of less than 15%. Iraq has had free and fair elections beginning in 2007, but has suffered from the latest outbreak of violence. Some of the Gulf monarchies (Oman, Qatar, Saudi Arabia, UAE) conduct elections only on the municipal level, hence lack any

democratic legitimacy on the national level. A dramatic decline took place in Egypt, with the 2014 election of President Abdel Fattah al-Sisi failing to fulfill the basic criteria of being free and fair. Parliamentary elections have been announced for fall 2014, but no precise date had been set as of the time of writing.

Association/assembly rights

To what extent can individuals form and join independent political or civic groups? To what extent can these groups operate and assemble freely?

In a number of countries, including Algeria, Egypt, and Syria (though in the latter only for a very short time), association and assembly rights were affected by decades-long states of emergency that were lifted only in the wake of the Arab Spring in 2011. After the ousting of President Morsi, Egyptian authorities imposed a nightly curfew for several months, which clearly hindered associations' ability to meet and take action. Strict association and assembly limitations are the norm in the Gulf countries, including Iran, while Yemen has been a positive exception since its period of democratization in the first half of the 1990s. Lebanon has retained its traditional liberal association and assembly laws despite repeated civil wars and internal conflicts, while in post-Qadhafi Libya, restrictions on assembly were completely lifted primarily due to the central government's loss of authority and the following slip into anarchy.

Freedom of expression

To what extent can citizens, organizations and the mass media express opinions freely?

After important improvements in the late 1990s associated with the privatization of TV channels and the introduction of satellite technology, press freedom was one of the elements used by many governments to satisfy Western demands through the implementation of limited cosmetic reforms. Journalists are faced with many (explicit and implicit) barriers to their reporting, and risk being imprisoned virtually at random. In addition, civil wars and criminal gangs have made Iraq, Libya, Syria and Yemen in particular extremely dangerous for journalists. In war zones, religious freedoms too have come under massive pressure, often forcing members of minority confessions to leave their regions to avoid persecution. Freedom of political expression is often impaired by the impermissibility of criticizing the state's top representatives and top institutions; for example, Egypt's authorities prevent any expression of support for the banned Muslim Brotherhood or any criticism of the current regime. Positive signs can be seen in Iran after the election of President Hassan Rouhani, though calls for more media freedom, such as the legalization of Twitter and Facebook, remain unanswered.

Rule of law

The rule of law exists mainly on paper in the MENA region. In practice, many regimes blatantly disregard citizens' rights and employ excessive violence against critics and dissidents. This situation has worsened since 2011. Apparently, many autocratic regimes experienced a "learning effect" with regard to countering popular uprisings. Syria is only the most extreme example of the devastation caused by the ignorance and misbehavior of kleptocratic regimes. Hope exists in Tunisia, where the 2011 uprisings have been followed by successful steps toward more democracy and a stronger rule of law. Egypt, meanwhile, has abruptly ended its democratic interlude, and is likely set to experience a greater degree of abuse of the rule of law than before the uprisings.

Separation of powers

To what extent is there a working separation of powers (checks and balances)?

The separation of powers is in many cases hindered by the accumulation of power in the executive, often in line with the constitution (particularly in the monarchies), but sometimes in violation of constitutional principles. Parliaments hold meaningful oversight powers only in

Iraq, Kuwait, Lebanon and Tunisia. The separation of powers is further reduced by “le pouvoir,” or powerful families and clans that dominate politics and business. This is common practice in the Gulf monarchies, but also exists in Algeria, Morocco and other countries. In Iran, Supreme Leader Ayatollah Khamenei and his Council of Guardians govern outside any system of checks and balances. Thus, the official separation of powers between government and parliament is severely reduced in importance, even though parliament has successfully demanded the dismissal of particular ministers.

Independent judiciary

To what extent does an independent judiciary exist?

Within the MENA region, only the Lebanese judiciary enjoys a significant degree of independence, though confessional quotas and political interference are also factors here. Jordan’s judges and lawyers also act relatively freely, but their decisions and behavior are almost always in line with the monarch’s overall policies. The new constitutions in Egypt and Tunisia guarantee the judiciary’s independence; however, while the outlook remains positive in Tunisia, Egypt’s judiciary has played a major role in the government’s recent targeted persecution of members and supporters of the Muslim Brotherhood. In all other countries, judicial entities are clearly meant to support the autocratic regimes and act without reference to professional ethics or conventional professionalism.

Civil rights

To what extent are civil rights guaranteed and protected, and to what extent can citizens seek redress for violations of these rights?

Civil rights are neither guaranteed nor well protected throughout the region. The situation in Sudan is particularly alarming, not only in the conflict-torn Darfur territory in the west or in the disputed areas along its new border with South Sudan, but indeed all over the country. Of particular concern are civil-rights violations against women, who are perceived as second-class citizens, with mass imprisonments and sexual violence directed against female activists. However, women face very similar conditions in other civil-war-torn countries including Libya, Syria and Yemen, and suffer from various other forms of discrimination in most other Arab countries, particularly with regard to family codes. While women from upper-class families often have access to higher education and top positions in politics and business, the many women of lower social classes often lack decision rights, and have to follow their male partners’ directives. Demonstrations in many countries have been met with massive state violence, particularly in Bahrain, Egypt, Iran and Saudi Arabia, where prisoners are frequently tortured and access to legal aid is often denied, despite this right being technically anchored in the constitution or law.

Projections 2015 – 2030

Political participation

Political participation will improve only gradually in a few countries, if at all. The Arab Spring has shown that many people can be mobilized to protest against suppression and injustice, but the step from removing a regime to introducing a new politics has so far been taken only in Tunisia. The outbreak of violence in many countries since 2011, with the emergence of jihadist groups such as the “Islamic State” (IS) in the Levant or the diverse rebels in Libya and the wider Sahel region, has propped up autocratic regimes that contend that security, not political liberalization, is the most important current priority. The bleak economic situation has amplified calls for “strong leaders” capable of leading countries out of their current troubles. As long as the Gulf countries can base impressive economic growth rates on the export of natural resources, serious improvements cannot be expected there, as oil rents are used to maintain depoliticized

societies. The Gulf countries also play a vital political role in poorer Arab countries, as their financial support serves to bolster existing repressive regimes. They also successfully reduce international pressure, as governments can easily turn to Saudi Arabia, Russia, China or others if Western donors demand too many reforms. Hence, serious improvements in most countries seem unlikely. A different scenario might arise if the Saudi royal family were to lose its power. This could conceivably happen as a result of internal quarrels over the succession, a military coup or a takeover by Islamist groups opposed to the royal family. If this latter were to occur, it would have major implications for the other countries on the Arabian Peninsula, but particularly for Egypt, which depends heavily on Saudi Arabia's economic support.

Rule of law

With the notable exception of Lebanon, Tunisia and to some extent Kuwait, the rule of law will continue to exist merely on paper in most countries. Current tendencies toward increasing autocracy will most likely continue, as the remaining autocratic regimes have learned their lessons from the Arab Spring. Future protests and demonstrations will probably be answered with increased police violence, and the fight against Islamists (who are as a rule labeled terrorists regardless of their tactics) will remain one of the major justifications for the disregard of basic civil rights and calls to rally to the support of hardline military regimes. Islamist extremist groups might gain power in certain countries, particularly those with low military capabilities such as Libya, Saudi Arabia and Yemen. Either case will impact negatively on institutional checks and balances, as well as on the judiciary's independence. Women's rights will remain under massive pressure, particularly in areas under jihadi groups' control and in the Gulf countries. Across the region, security is likely to continue to be used by regimes as an excuse to crackdown on freedoms in the name of the rule of law.

Access and inclusiveness

Regional overview

Access and Inclusiveness		Political and Social Integration				Inclusiveness and Non-Discrimination			
			Party system	Interest groups	Social capital		State identity	Socioeconomic barriers	Equal opportunity
Lebanon	6.17	6.0	5	7	6	6.3	8	5	6
Tunisia	5.83	5.0	4	6	5	6.7	9	5	6
Algeria	5.50	5.0	4	6	5	6.0	8	5	5
Kuwait	5.50	4.0	2	6	4	7.0	7	8	6
Qatar	5.17	3.0	1	4	4	7.3	7	9	6
UAE	5.17	3.0	1	2	6	7.3	7	8	7
Egypt	4.83	5.3	4	6	6	4.3	7	3	3
Bahrain	4.67	4.0	3	6	3	5.3	6	6	4
Libya	4.67	3.7	4	4	3	5.7	7	5	5
Oman	4.67	2.3	1	3	3	7.0	8	6	7
Jordan	4.50	4.0	2	5	5	5.0	6	4	5
Morocco	4.33	4.0	3	4	5	4.7	7	3	4
Iran	3.67	2.7	2	2	4	4.7	8	4	2
Saudi Arabia	3.50	2.7	1	3	4	4.3	6	4	3
Iraq	3.33	3.3	4	3	3	3.3	4	3	3
Yemen	3.00	3.3	4	4	2	2.7	4	1	3
Sudan	2.67	3.0	3	3	3	2.3	3	2	2
Syria	2.67	1.7	1	2	2	3.7	6	2	3

Indicator Scores, Transformation Index BTI 2014

Note: Scores reflect the situation as of January 31, 2013.

While a fairly active civil society exists in most of the better-ranked countries, political society remains completely underdeveloped; in none of the countries do political parties play a sufficient role. This includes even **Lebanon**, where parties are more the political extension of the particular interests of clans or sects. This constitutes one of the region's biggest shortcomings. If the assumption is correct that successful democratization requires a sufficiently developed political society, the outlook for the development of more democracy in the region remains poor. Most governments take an active part in retaining such a status quo. In **Oman**, **Qatar** and the **United Arab Emirates**, governments follow a relatively inclusive course in terms of socioeconomic participation and equal opportunity, but civil-society political participation and political activism is neither wanted nor encouraged.



Meanwhile, state identity is generally sufficiently high, with the exception of **Iraq, Sudan** and **Yemen**, each of which face strong movements for independence. However, it should be noted that high scores with regard to state identity in **Egypt, Libya** and **Syria** (as of early 2013) are clearly outdated today. Territorial disputes may become an even more urgent problem in the future, as social exclusion is already a pressing challenge today. Particularly in the non-oil-based economies, broad swathes of society suffer from economic deprivation and are barely included under the rubric of social policies and welfare programs. As populations in many of the region's countries are still growing, demographic pressures require urgent and comprehensive solutions, with U.N. population-growth forecasts being particularly alarming for **Egypt** and **Iran**.

Analysis

Political and social integration

Party system

To what extent is there a stable and socially rooted party system able to articulate and aggregate societal interests?

Party systems are only rudimentarily developed in most countries. Even Lebanon has severe flaws in its party system, which is mainly a reflection of the country's all-defining sectarian divisions. In Egypt and Syria, the dominance of the state parties has left opposition parties deprived of most resources, while multiparty systems suggest the possibility of a political choice that does not exist in practice. In Egypt, the banning of Mubarak's National Democratic Party and the Muslim Brotherhood's Freedom and Justice Party excluded the only two potent parties from future political activity. Despite its similar historical background, Tunisia has been surprisingly successful in establishing a party system that offers meaningful political choice between parties with different programmatic orientation, ranging from former opposition groups to completely new parties that were openly competing for votes in parliamentary elections on 26 October 2014. In some Gulf countries, including Oman, Qatar, Saudi Arabia and the UAE, the formation of political parties is not allowed.

Interest groups

To what extent is there a network of cooperative associations or interest groups to mediate between society and the political system?

Many citizens prefer to work through self-organized groups to express their interests rather than through official parties. However, restrictive legislation usually prevents the establishment of genuinely influential civil-society organizations. While the number of NGOs is huge in some countries of the region, most of them are underfunded. Lebanon's landscape of interest groups is again tailored along the sectarian cleavage lines, while in Algeria, Egypt, Jordan, Morocco and other countries, NGOs are often coopted by the state. Independent interest groups are often perceived as potential threat to state authority, particularly since Islamist parties and organizations gained much of their societal support through social engagement in the 1990s and afterward.

Social capital

To what extent have social self-organization and the construction of social capital advanced?

None of the countries in the region demonstrates significant social capital. On the one hand, social self-organization is discouraged by a repressive political environment, and the high degree

of polarization and social conflict further reduces trust within the population. On the other hand, the shrinking of the middle classes has diminished the one layer of society usually perceived to contribute most to the establishment of social capital. In addition, social activities often occur along sectarian lines, and do not cross boundaries between religious or ethnic groups. This is particularly the case in Lebanon, but also holds in the tribally constituted societies of Libya, Syria and Yemen. The rich Gulf monarchies provide comprehensive services for their citizens, a factor that reduces the need for socially oriented joint activities. An exception is the United Arab Emirates, where social capital has been strengthened through awareness campaigns since 2007.

Inclusiveness & non-discrimination

State identity

To what extent do all groups in society have access to citizenship and naturalization? To what extent do all relevant groups in society agree about citizenship and accept the nation-state as legitimate?

In many countries of the region, state identities conflict with tribal, sectarian or ethnic identities. This applies to members of Bedouin societies, who traditionally crossed borders frequently. Today, stateless Bedouins are still refused citizenship in certain Gulf countries. More recently, insurgent groups have challenged state authority, on a large scale in Libya and Syria (with spillovers to neighboring countries, particularly Iraq), as well as on a lower but more long-term level in Yemen and parts of Algeria and Egypt. Morocco is still not accepted as an African Union member due to its unsolved Western Sahara conflict, and Sudan split in 2011 following a decades-long secessionist movement in its former south. In addition, sectarianism is a widespread problem in the region, particularly affecting Bahrain, Iraq, Lebanon and Yemen, where sectarian and ethnic-based identities are stronger than state identities and threaten to fragment the existing states.

Socioeconomic barriers

To what extent are significant parts of the population fundamentally excluded from society due to poverty and inequality?

On average, socioeconomic barriers are very low in the Gulf monarchies, but quite high in the remaining countries of the region. The wealth produced by state-dominated economies has been insufficient to increase the well-being of wide portions of the societies, and the latest wave of privatization since the 1990s has mainly led to the further enrichment of the powerful. This applies even to Saudi Arabia, as those not belonging to the royal family or to affiliated clans quite often live in poverty, with high poverty rates particularly in the country's eastern areas and the suburbs of major cities such as Jeddah, where many people live in slums. Social exclusion particularly affects the large numbers of blue-collar guest workers from sub-Saharan Africa or Asia, who often work under intolerable conditions and on the basis of slave-like kafala dependencies. Religious minorities, such as the Baha'i in Iran or the Shi'ites in Egypt, are often disfranchised.

Equal opportunity

To what extent does equality of opportunity exist?

Equal opportunity is obstructed by tribal cleavages and/or religious and patriarchal concepts of societies that carry disadvantages for many, but particularly for women. This is de jure less the case in former socialist republics such as Tunisia and Egypt, but even there, particularly in rural areas, girls are often treated less favorably in terms of education, health care, job search and marriage. Adult women are often expected to fill a role as mother and wife first, before satisfying their own needs and wishes. Other patterns of discrimination also persist, particularly as recruitment in public administrations or even private companies is often based on kinship, not skill levels or experience. The same applies to state services, which are often primarily channeled

toward regions or clans close to the country's regime. Social discrimination affects the education sector in particular. While public schools often fail to provide students with adequate education, tuition for private schools constitutes a barrier for children from poorer families. Women remain on the margins of society across the Arab world, except for Tunisia. In general, Arab women face significant discrimination on the social, economic, and political fronts.

Patterns of discrimination

To what extent is the inclusiveness of societies hampered by structural discrimination based on ethnicity, religion or gender?

Class, religion, gender, ethnicity or tribal affiliations serve as significant divides in most of the region's societies. These differences are structurally entrenched and difficult to overcome. Economic exclusion has become a problem for a majority of people in former socialist republics such as Algeria and Egypt, while inclusion has significantly deteriorated in countries suffering from civil wars, particularly in Libya, Syrian and Yemen. Patriarchal concepts result in discrimination against women, while kinship relationships overshadow recruitment based on merit or even political orientation.

Projections 2015 – 2030

Political and social integration

The lack of societal self-organization is one of the biggest hurdles to successful democratization in the region, a situation likely to continue due to regimes' disinterest in improving the opportunities and influence afforded to civil-society groups. Though the spread of poverty particularly in the former socialist republics (Algeria, Egypt, Syria, Yemen) has increased the demand for social self-organization, it is hard to imagine that the growing needs in these areas could in fact be filled by voluntary organizations. As the success of Islamist groups such as the Muslim Brotherhood in Egypt has historically been based on their socially oriented and self-organized activities, governments will try to retain strict controls over the existence and activities of grassroots organizations, as they are perceived to be a potential pool for future opposition activists. Tunisia offers an exception in harboring political parties, civil society organizations, and labor unions that are likely to continue to put pragmatism ahead of ideology, and who are given the space to operate within the parameters of the state. Other countries in the region are likely to see the return to informal networks as a way of indirect political engagement.

Inclusiveness & non-discrimination

If economic development and societal modernization continue, gender- and ethnic-based discrimination may be reduced in the decade to come, yet without fundamentally changing societies' basic principles and structures. Reform-oriented individuals will continue to consider emigration, which will in turn negatively impact the chances for critical discourse and liberalization. The recent debate over work conditions for foreign workers in the Gulf monarchies has provoked considerable international criticism, and countries that seek international appreciation and involvement (such as Qatar and the United Arab Emirates) might ultimately improve their work conditions as a consequence. Ongoing wars and conflicts have had a devastating effect on state identity in divided societies, particularly in Iraq, Libya, Syria and Yemen, and it is unclear whether these states will be able to maintain their stateness in the years to come. Neo-liberal economic policies are not linked with measures of good governance, which perpetuates the problem of non-shared wealth between the haves and have-nots across the region.

Management and policies

Regional overview

Management and Policies		Strategic Capacity and Efficiency					Consensus-Building		
			Prioritization	Implementation	Efficient use of assets	Anti-corruption policy		Conflict management	Civil society participation
Qatar	6.38	6.3	5	5	8	7	6.5	8	5
Algeria	5.13	4.8	5	5	4	5	5.5	6	5
UAE	4.88	5.8	5	5	6	7	4.0	6	2
Tunisia	4.75	4.5	6	4	4	4	5.0	5	5
Morocco	4.63	4.3	5	4	4	4	5.0	5	5
Jordan	4.25	5.0	4	4	7	5	3.5	4	3
Kuwait	4.25	4.0	5	3	5	3	4.5	4	5
Egypt	4.00	4.5	5	5	4	4	3.5	3	4
Yemen	4.00	3.5	4	3	3	4	4.5	4	5
Lebanon	3.75	3.5	5	4	3	2	4.0	2	6
Bahrain	3.63	4.3	4	4	4	5	3.0	2	4
Saudi Arabia	3.63	4.3	4	4	4	5	3.0	3	3
Libya	3.50	3.0	4	3	3	2	4.0	3	5
Oman	3.50	4.0	3	4	5	4	3.0	4	2
Iraq	3.25	3.5	3	5	3	3	3.0	2	4
Iran	2.25	2.0	3	2	2	1	2.5	3	2
Sudan	2.00	2.0	2	2	2	2	2.0	2	2
Syria	1.13	1.3	1	1	2	1	1.0	1	1

Indicator Scores, Transformation Index BTI 2014

Note: Scores reflect the situation as of January 31, 2013.

With many countries reigned over by royal families that derive their legitimacy from religious sources (**Jordan, Morocco**) or simply tradition (**Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates**), or governed by presidential regimes that have lacked any meaningful opposition for decades (**Algeria, Egypt, Iran, Iraq, Libya, Sudan, Syria, Yemen**), it comes as little surprise that the region's overall results in terms of management

and policymaking are hardly satisfying. Even **Lebanon**, the region's only traditional electoral democracy, fails particularly with regard to anti-corruption policy and conflict management. These disappointing results mainly stem from the country's significant heterogeneity and the mutual checks provided by the country's main population groups, a factor inherent in **Lebanon's** specific consociational democracy model.



By comparison, **Algeria** fares quite well. However, this is owed solely to its conflict-management performance, as the government has had some success in recent years in brokering agreements with certain disloyal groups in its southern territories, as well as in neighboring **Mali**. Regarding capacity and efficiency, **Algeria** performs hardly any better than the other North African countries.

Qatar is the only country with a good management performance. Surely, as a small and rich country it is much better positioned than most other regional peers; but then again, the gaps between its quality of governance and that of the **United Arab Emirates** or particularly of **Bahrain, Kuwait, Oman** and **Saudi Arabia** are large. But even in **Qatar**, good management is not the result of the presence of viable state institutions but to the small size of the population and the centralization of policy in the hands of few members of the royal family, which gives an impression of coherence when the country's state system is closed and independent voices are quelled.

Iran, Sudan and **Syria** are by far the worst performers, not only in the region but also on a global scale – **Syria** is even ranked worse than **North Korea** in this area. Iran's future development, meanwhile, depends significantly on the performance of President Hassan Rouhani, in office since August 2013. The scores presented here still refer to the late period of former President Mahmoud Ahmadinejad.

Analysis

Strategic capacity & efficiency

Prioritization

To what extent does the government set and maintain strategic priorities?

Governments often set strategic priorities only rudimentarily, whether due to impotence (currently the case in Iraq, Libya, Syria and Yemen) or ignorance and incompetence (almost all other governments). Since the 1990s, all governments in the region have pursued economic development without meaningful political liberalization, and the discourse regarding necessary stabilization and security is often abused today as an argument against further democratization. Corruption and favoritism are common, as governmental decisions are in most cases designed to benefit members of kinship networks and other supporters.

Implementation

How effective is the government in implementing its own policies?

Despite the abundance of long-term development strategies and poverty-reduction plans in almost all countries, implementation often remains rudimentary and weak. This is not surprising in civil-war-torn countries, but in fact also applies to countries that have the potential for better development, such as Kuwait, Jordan, Morocco, Oman and Saudi Arabia. In Egypt, President Sisi has identified a stricter implementation of governmental policies as a priority. In Algeria, the increasingly frail President Abdelaziz Bouteflika lacks the authority and decisiveness to design and implement his own policies. In other countries such as Jordan, governmental reforms are successfully being implemented, but fail to address major structural problems.

*Efficient use of assets**To what extent does the government make efficient use of available human, financial and organizational resources?*

The entire region is clearly below the global average regarding efficiency. Several factors contribute to this situation. First, structural exclusion prevents existing capacities and competences to be used to their full potential. Second, governments put a top priority on securing their power base, even if this implies wasteful and non-meritocratic procedures designed to serve the old, well-established elites instead of promoting creative and potentially more efficient ideas that could challenge the status quo. And finally, in conflict-ridden Iraq, Libya, Syria and Yemen, many promising young people have either left the country or withdrawn from public activity. As the region's education systems are generally incapable of providing sufficient capacity development, expertise comes mainly from outside, either through development cooperation in the poorer countries or through business consulting in richer nations. Nationalization programs, particularly in the Gulf countries, have failed to obtain successful results due to insufficient training offers and reward programs.

*Anti-corruption policy**To what extent does the government successfully contain corruption?*

Anti-corruption policies have gained in importance in almost all countries across the region, but little has yet been achieved. Legislation and auditing institutions have been enacted or expanded, but most have failed to deliver results. To date, office abuse has largely been prosecuted at lower administrative levels, while high-ranking officeholders have remained immune to oversight and control mechanisms. When spectacular corruption cases have been made public, this has often been used by regimes to silence potential opponents, as happened in Iran, Sudan and Syria. Journalists, bloggers or civil-society activists who disclose cases of corruption are often prosecuted and convicted, such as in Libya. In general, economic liberalization without proper political opening including horizontal accountability provides a fertile breeding ground for corrupt behavior, a situation that continues unchecked in most countries of the region.

Consensus-building*Cleavage/conflict management**To what extent is the political leadership able to moderate cleavage-based conflict?*

Governments not only often fail to moderate existing cleavages, but at times even fuel them in order to pursue their own agenda. Scapegoating of vulnerable groups is a frequent behavior by almost all governments, though to different degrees. The Algerian government was successful in reducing cleavages after the devastating civil war of the 1990s. Tunisian decision-makers from all societal groups have achieved remarkable success in consensus-building, managing to resolve emerging conflicts during the transition phase and the drafting of the new constitution in a peaceful and cooperative manner.

*Civil-society participation**To what extent does the political leadership enable the participation of civil society in the political process?*

Civil-society participation is rather limited. The best regional performer is Lebanon, where the political leadership at least from time to time includes civil-society actors in the decision-making process when preparing and executing policies. Other regional governments do not encourage any civil-society contribution through institutionalized channels, but instead consult with external advisors, some of which are said to represent civil society, on an ad-hoc basis. Advice is sought only in non-sensitive areas, and civil-society engagement is mostly confined to local issues, such

as cleaning up neighborhoods or raising awareness of environmental problems. The situation is particularly disappointing in Egypt, where almost all youth activists of the 2011 revolution have been removed from influential positions, and are today excluded from political decision-making processes.

Projections 2015 – 2030

Strategic capacity & efficiency

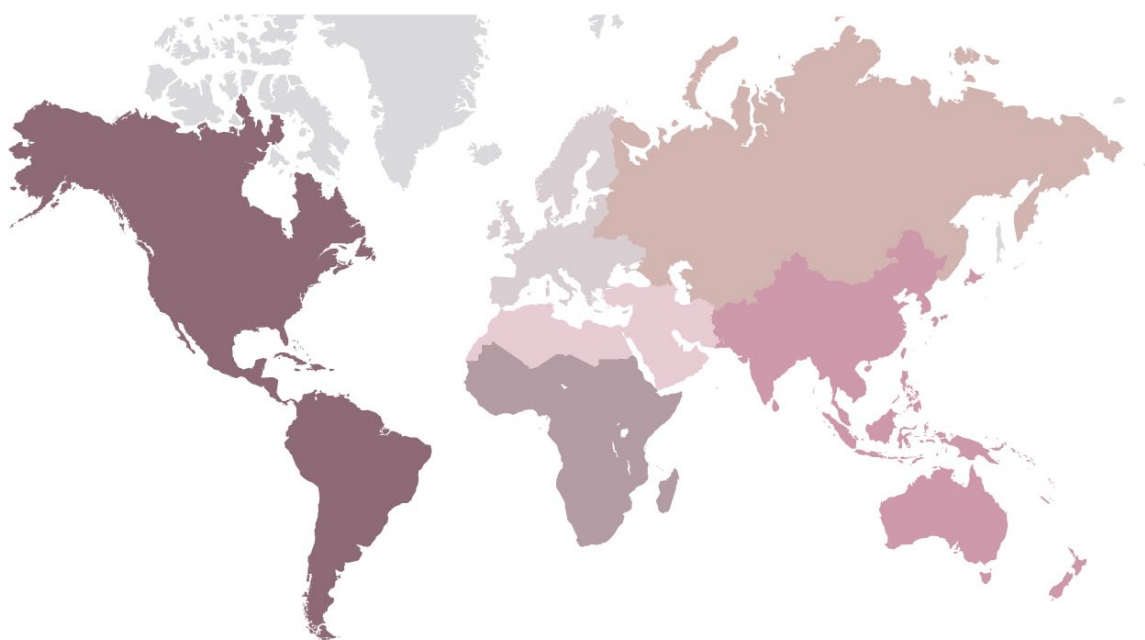
A number of governments manage their countries very poorly. If reform priorities are set, they are mostly confined to the economic sphere, and are often put into practice only rudimentarily. Corruption levels are high and prevent a thorough realignment of state authorities and the public administration in the form of merit-based recruitment and the promotion of young, independent staffers. This constitutes a major barrier to the improvement of governmental-steering capabilities in the future, and will prolong the reliance on external expertise. Particularly in the resource-rich Gulf monarchies, but also in the poorer countries of North Africa and in the Levant, the lack of domestic experts educated in domestic schools and universities can only be remedied through the continuous engagement of external experts, though these do not necessarily have to come from Western countries.

Consensus-building

It must be expected that autocratic governments will exploit and even exacerbate existing conflicts the more their rule is challenged. In that sense, conflict management and civil-society participation are negatively correlated – the more a regime feels itself to be under threat, the less it will be supportive of broad participation and conflict resolution, and will instead rely on scapegoating and false accusations to polarize, exclude and ultimately justify repression. Alleged attacks against state security have been invoked to an increasing degree over the last year, with the clear aim of eliminating potential regime opponents. In that sense, it is unlikely that the Middle East and North Africa region will become more peaceful in the foreseeable future.



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