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The Underlying Causes of the Crises and Upheavals in the Middle East and North Africa: An Analytic Survey

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Introduction

The political dynamics and violence that shape the current series of crises in the Middle East and North Africa (MENA) – and daily events in Bahrain Egypt, Iran, Iraq, Lebanon, Libya, Tunisia, Syria, and Yemen – dominate the current course of virtually every aspect of these states including much of the current course of violence and instability in the region. Political dynamics and the current levels of, however, are only part of the story.

They have many underlying causes, and causes that that vary sharply by country. The current pattern of politics, religion, and ideology are shaped by major tribal, ethnic, sectarian, and regional differences within a given nation. An examination of the broader demographic, economic, and security trends in the MENA region shows how critical these factors are in shaping public anger and discontent. They also show the critical role of the quality of governance, internal security systems. justice systems, and progress in social change in shaping and dealing with each nation's problems.

There is no reliable way to assess the deep underlying structural impact of factors like demographics and economics on unrest. Both efforts at modeling and analysis, and a wide range of polls show that it is impossible to credible assign weight top a given measurement or trend. Efforts like the Arab Development report warned nearly a decade ago, however, that demographic pressures, failures in economic development and the combination of challenges related to income distribution, deep problems with corruption and nepotism, and discrimination were compounding pre-existing agitation over a lack of freedom, threatening regional stability, creating significant challenges to given countries.

No one can realistically address the current upheavals in key countries and the MENA region without considering such factors. A focus on politics and violence, and on issues like terrorism and religion understates both the forces at work and the time and effort needed to correct them. This briefing help set the stage for a better understanding of the underlying causes of unrest by surveying some of the key statistics and data on the key trends in demographics, economics, internal security and justice systems, governance, and social change, and showing how they affect both the region and differ by individual nation.

The Need for Far Better Data, Planning, and Analysis

The briefing serves another purpose as well: it illustrates the severe limits to the availability and quality of the data on many key aspects of stability. As such, it is a warning that countries, intelligence experts, members of international institutions, NGOs, and area experts need to do a far better job of developing basic data on the causes of instability.

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The Need for Valid Data, and More Relevant Metrics, in A World of International Statistical Rubbish

One key problem affecting all of the current crises in the region is the failure to collect accurate, up-to-date data that measures the seriousness of the problems involved in nations whose instability and violence has now led to years of deterioration in the real-world economics that affect their citizens and key ethnic, sectarian, and income groups. Worse, in many cases, the data available not only long predate the now years long course of the Arab Spring, but never included information that went beyond national totals to examine difference by tribe, ethnicity, region, sect, class, and other key sources of discontent. As a result, measures like GDP growth not only become irrelevant, but also showed progress in terms that are totally misleading in regards to their real world impact on the population as whole, and the pressures and perceptions shaping the actions of key elements of the population

Even the limited and sometimes dated information in the charts and tables that this briefing presents, however, show that important variations exist in basic data on factors such as the size of given economies, per capita incomes, populations, and population growth rates. These discrepancies challenge much of the single point analysis used by the US government, some UN agencies, and key international organizations like the World Bank and IMF. They include enough comparisons of efforts to provide summary scores on factors like governance and justice systems. Some of these comparisons are untrustworthy or uncertain in measuring how given countries do or do not meet given challenges, but a lack of reliable measures – often driven by underfunding rather than the limits to collection – is always a warning that far better efforts are necessary.

It is also important to note that this briefing can only hint at the problems that currently exist in the data: no one source or organization emerges as reliable in reporting on any key parameter that is currently being measured. Seeming agreement is largely the result of using the same uncertain method or data. More often, serious variations exist in basic data on factors such as the size of given economies, per capita incomes, populations, and population growth rates. They include comparisons of efforts to provide summary scores on factors including governance and justice systems. Some of these comparisons speak for themselves in showing how untrustworthy such systems are as a substitute for looking at the details of how given countries do or do not meet given challenges.

The Drunkard and the Lamp Post: Failing Update Metrics and Analysis to Measure What Actually Counts

All this shows that far better data are needed in key areas like unemployment and underemployment, income distribution, the efficiency of the state sector, barriers to growth and economic development, the size and function security forces and police, and quality of governance.

Some key societal factors that affect a remarkably young population remain unmeasured. These include factors such as access to meaningful, job-related education, the cost of marriage, substantive employment leading to real careers and income to marry, dependence on the state sector, career options for young women, social mobility and status, and the belief that government and social order offer dignity and justice while being free enough of corruption and favoritism to create loyalty and hope.

The figures in this briefing also reflect the fact that there are few reliable qualitative data on key government services such as education, housing, medical services, water and refuse removal, and infrastructure. The data on corruption and rule of law do not begin to reflect the degree to which given elements of MENA populations are angry at their governments, furious about their living conditions, and identify the political and social framework as unjust.

Furthermore, the data that are available shows that there is a need for far better efforts at statistical standardization, for transparency, for added data on critical aspects of stability, and for accepting the sheer complexity of the various force at work.

Finally, it is clear that metrics and analyses that do not include survey data on popular perceptions of the quality of all these factors involved and ignore the country-by-country causes of popular discontent and anger, have only limited value.
Polls can be a key tool in supplementing the metrics provided in this briefing, but they are often lacking – or unreliable – in measuring key areas of popular perceptions of the causes of instability.

The Near Certainty of Regime Change Cannot Bring Near Term Stability

That said, the briefing shows that the data presented in this briefing do illustrate the conditions that have made popular unrest so great, and many show why many of the peoples in the MENA region have reason to distrust their governments.

There are no reliable ways to provide exact measurements of the quality of governance and the justice system, but the briefing shows that indicators that are available regarding the quality of governance show that "corruption" is only part of a much broader pattern of gross inefficiency, favoritism and nepotism, and indifference to popular needs that has built up over decades.

The demographic and economic data reveal patterns of population growth and other trends that make any quick solutions or improvements difficult to impossible. In the case of far too many countries, problems such as the need for jobs on the part of the region's youth are, in and of themselves, certain to put extreme stress on their governments for a decade or more to come.
In such cases, governments may become more "legitimate" in the way they are chosen and in their reduced reliance on repression. They will not, however, be able to build legitimacy by successfully treating the underlying causes of unrest for years to come, and therefore political change alone offers little hope of future stability .

A Decade to a Quarter Century, Not a "Spring"

Finally, the broader patterns that emerge from the entire set of indicators warn that that the "Arab spring" is likely to involve a decade of more of political, economic, and social unrest. The causes of unrest are deep, complex, and involve structural problems in governance, demographics, and economics. None can be solved in a few months or years. Even the most successful nations – and the briefing shows that such nations clearly exist – still face major challenges over the next decade. Others must fight their way out of problems that have brought them close to the edge of becoming "failed states."

Most MENA states have no real political parties or pluralistic structures, and only the monarchies have a history of political legitimacy. There is no clear basis for representative government, no experience with political compromise and making elections work, and no pattern of effective governance combined with economic progress and social evolution to build upon. Ethnic and religious issues often cut deep and have been repressed for decades. Justice systems are weak and/or corrupt, religious extremism challenges necessary social and economic change, and the security forces are often an equal or more serious problem.

The US and the West may still think in terms of rapid, stable democratic change. None of the proper conditions exist in many states, and political evolution is the only road to stability in the others. The reality is that far too many revolutions eat their young and the hopes of those who cause them. The "European spring" of 1848, for example, produced continuing instability through 1914 – when new crises led to still greater problems.

There will be Arab successes, particularly with proper support and help from neighboring Arab states and the outside world, but sudden successes are unlikely and even the best regimes face major challenges where it will take years for them to meet popular hopes and expectations.

Wealth Distribution

Unequal distribution and income fluctuations create instability

The data involved are uncertain and many precede the current period of unrest, but it is clear that economics and inequities in the distribution of wealth are among the key forces driving unrest in the MENA region.

The Middle East has lagged considerably behind North America, Europe, and Central Asia, and somewhat behind Latin America, the Caribbean, East Asia, and the Pacific in terms of per capita GDP. The per capita GDP for the North American region also grew at a much greater rate than the per capita GDP for the Middle East: between 1980 and 2010 the North American GDP per capita nearly quadrupled, while the Middle East GDP per capita grew expanded by just 25 times its original value. In 2010, the per capita GDP in North America was $47,111, while the average per capita GDP in the MENA region was just $6,488.

In addition to stratification between the Middle East and other regions of the world, there is considerable discrepancy in GDP per capita ratios within the Middle East. The oil rich gulf countries had GDP per capita ratios far higher than their Levant counterparts; while Kuwait had a GDP per capita ratio of $46,970 in 2012, Jordan's ratio was $4,788.

At the same time, being a major oil producing and exporting state did not mean wealth. The per capita oil export income of Qatar, the MENA state with the high per capita income is 25 times the per capita income of Algeria, the MENA state with the lowest income.

This stratification also effects the level of development of MENA countries. A higher GNI corresponds to a higher level of development, meaning that those countries in the GCC rank consistently higher on a development scale than those in the Levant or North Africa. However, countries in the Levant and North Africa still invest considerable amounts into infrastructure for social services, but do so less efficiently than their GCC counter parts, meaning they rank lower on the development scale than a country with a similar GNI but a more efficient government would.

What is even more critical, however, is the inability any aspect of these data to the equity in come distribution, and measure the trends in terms of both how they affect given classes, and ethnicities, sects, tribal groupings, and regions.

Moreover, there is no way to correlate income to key factors like the "youth bulge" described alter, and key problems like disguised unemployment, the ability to marry, housing and other key social dynamics.

It is obvious that these are key potential sources of unrest – and ones that need polling data as well as absolute numbers – but no meaningful data and analysis is usually available for a given country or group – much less show the mix of patterns and trends in the MENA region.

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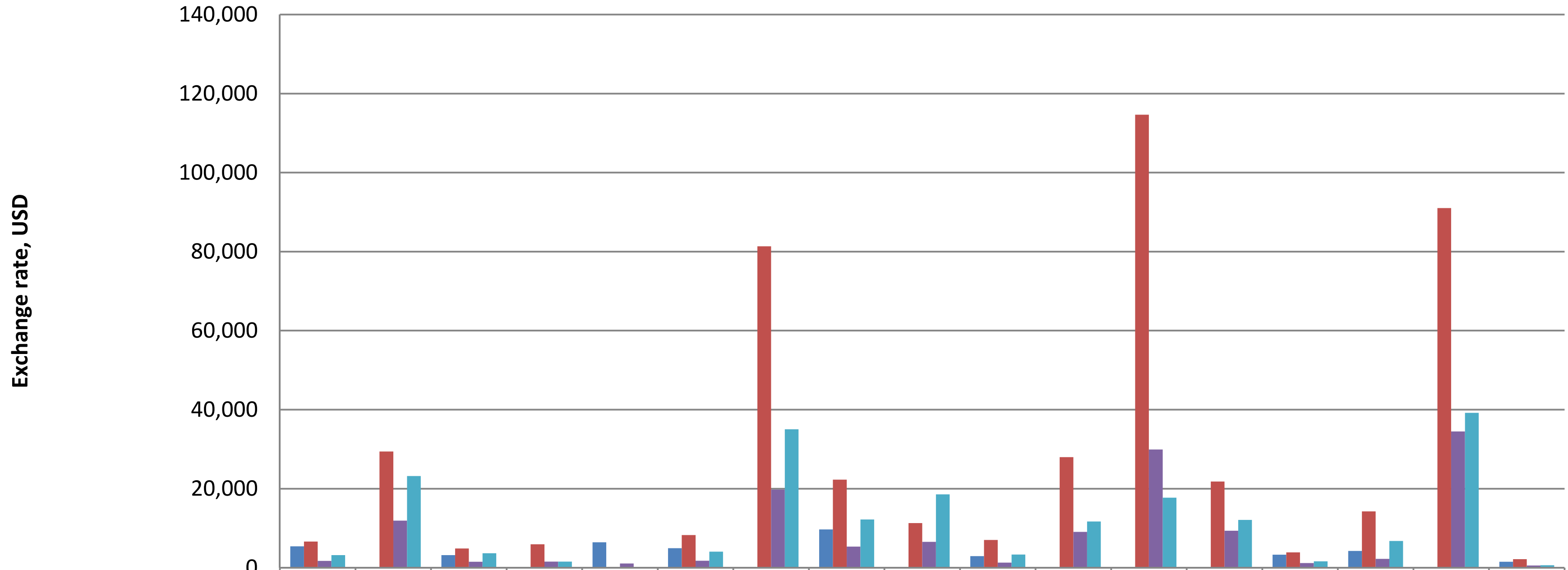
Per Capita Income and Wealth in the MENA Region: Comparing 2000 and 2012

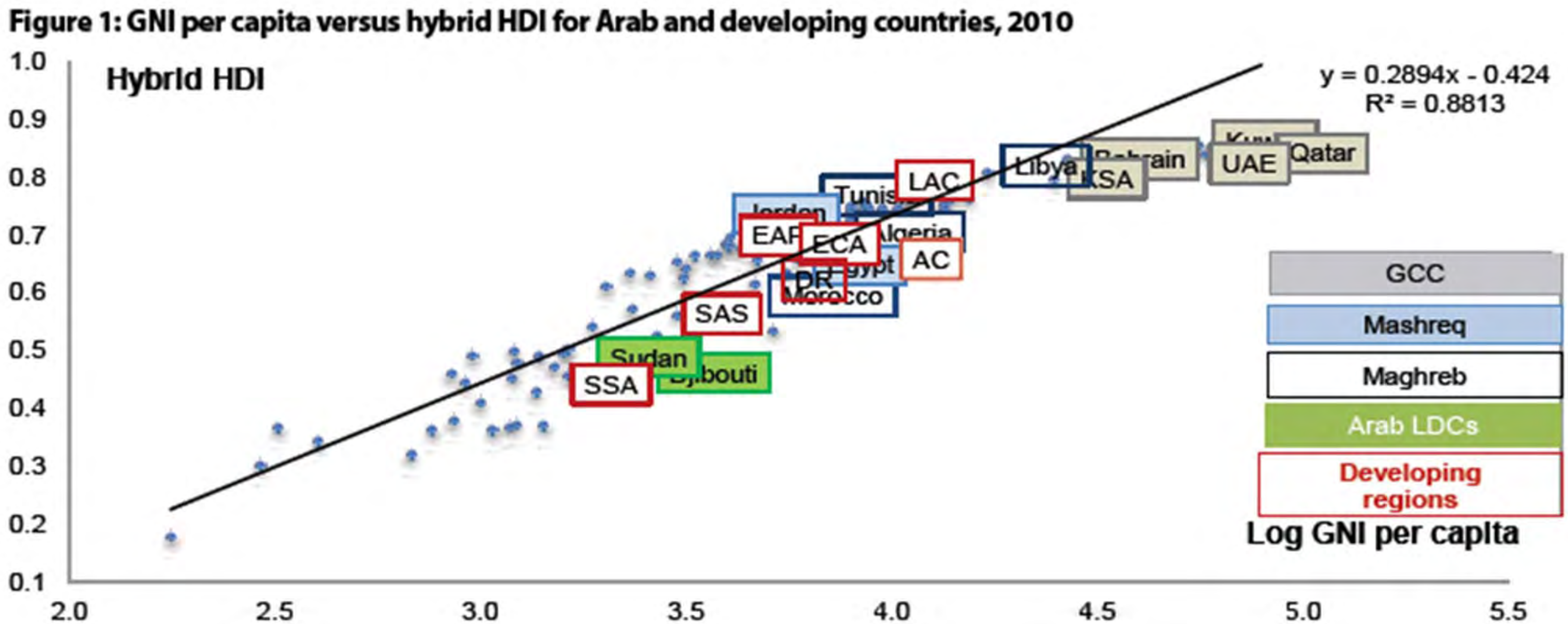


	Algeria	Bahrain	Egypt	Iran	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudia Arabia	Syria	Tunisia	UAE	Yemen
2012 Per Capita GDP	5,404	0	3,187	0	6,455	4,945	0	9,705	0	2,925	0	0	0	3,289	4,237	0	1,494
2012 Per Capita Wealth	6,619	29,395	4,850	5,921	0	8,252	81,330	22,300	11,295	7,006	27,979	114,66	21,823	3,870	14,250	91,018	2,165
2000 Per Capita GDP	1,727	11,928	1,510	1,537	1,086	1,764	19,787	5,335	6,549	1,276	9,062	29,914	9,354	1,180	2,245	34,476	550
2000 Per Capita Wealth	3,193	23,220	3,663	1,534	0	4,048	35,042	12,218	18,567	3,325	11,714	17,722	12,091	1,601	6,755	39,202	644

GDP Figures: "*GDP per Capita (current US$)*," *The World Bank*, accessed August 6, 2013
Wealth Figures: "Global Wealth Data Book 2012," Credit Suisse, October 2012, Accessed August 6, 2013, p. 33-36, p. 81-84

Regional and National differences in HDI and Per Capita Income

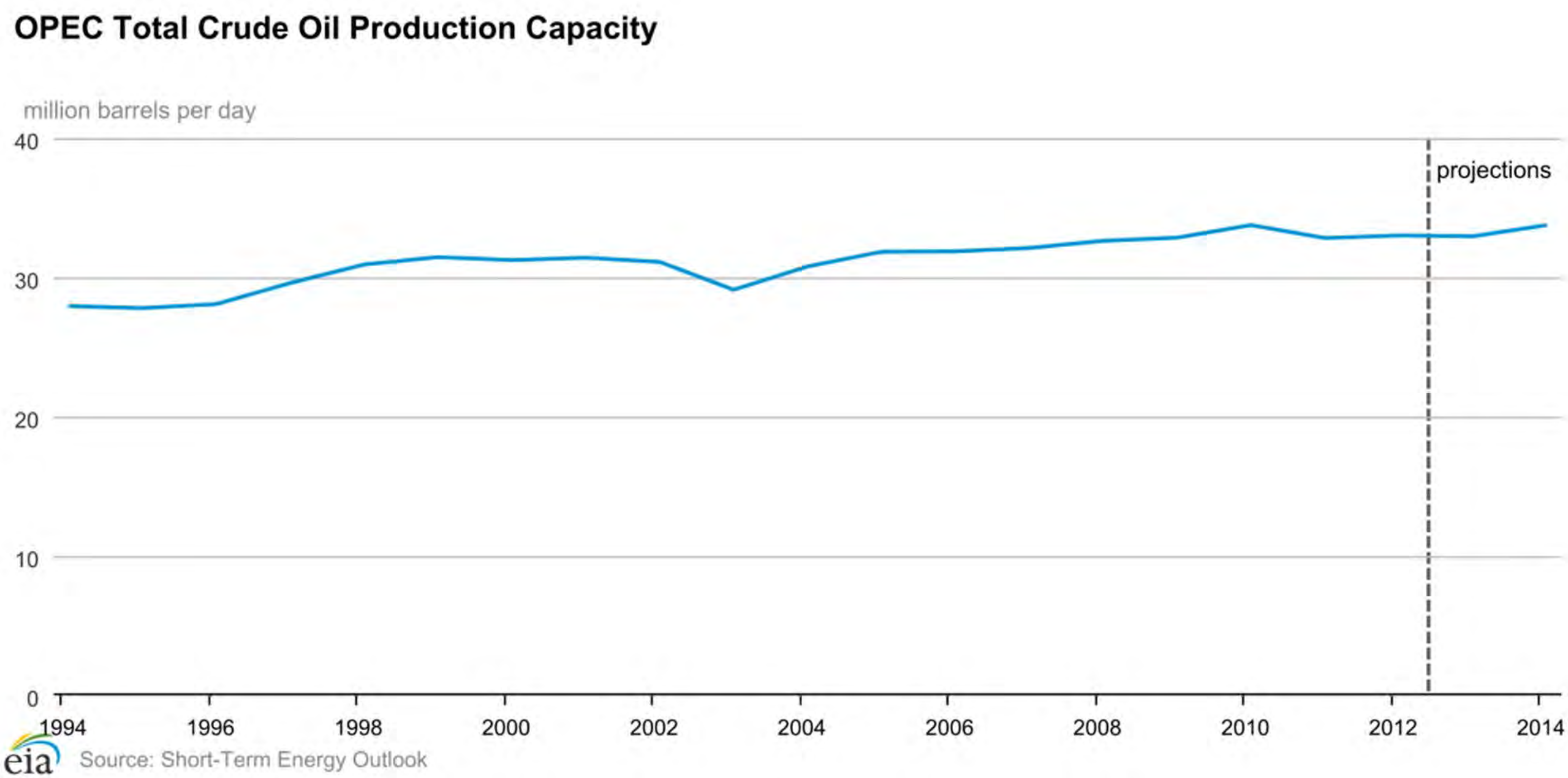
Figure 3



…all Arab countries, which have been identified by the global Human Development Report as top-movers, still lag behind on human development relative to their income levels. Simply put, most Arab countries could have attained higher levels of HDI had they been as effective as their peers in the developing world in implementing a human centred development path. This poor performance on human development, despite substantial investment in health and education, is arguably due to the impact of poor governance structures on the effectiveness of these expenditures. Poor accountability frameworks have led to high rates of corruption and disregard of quality issues. Ineffective or nonexistent parent-teacher associations and limited provision of funding for operations and maintenance of public assets have undermined the quality of education services in particular. In fact, many school facilities have been left in dilapidated conditions and with insufficient supplies of teaching aids..

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, p. 18.

The Real World Limits to Oil Production-I



Source: ***US Department of Energy, Energy Information Agency, Short Term Energy Outlook, August 2013,*** http://www.eia.gov/forecasts/steo/query/

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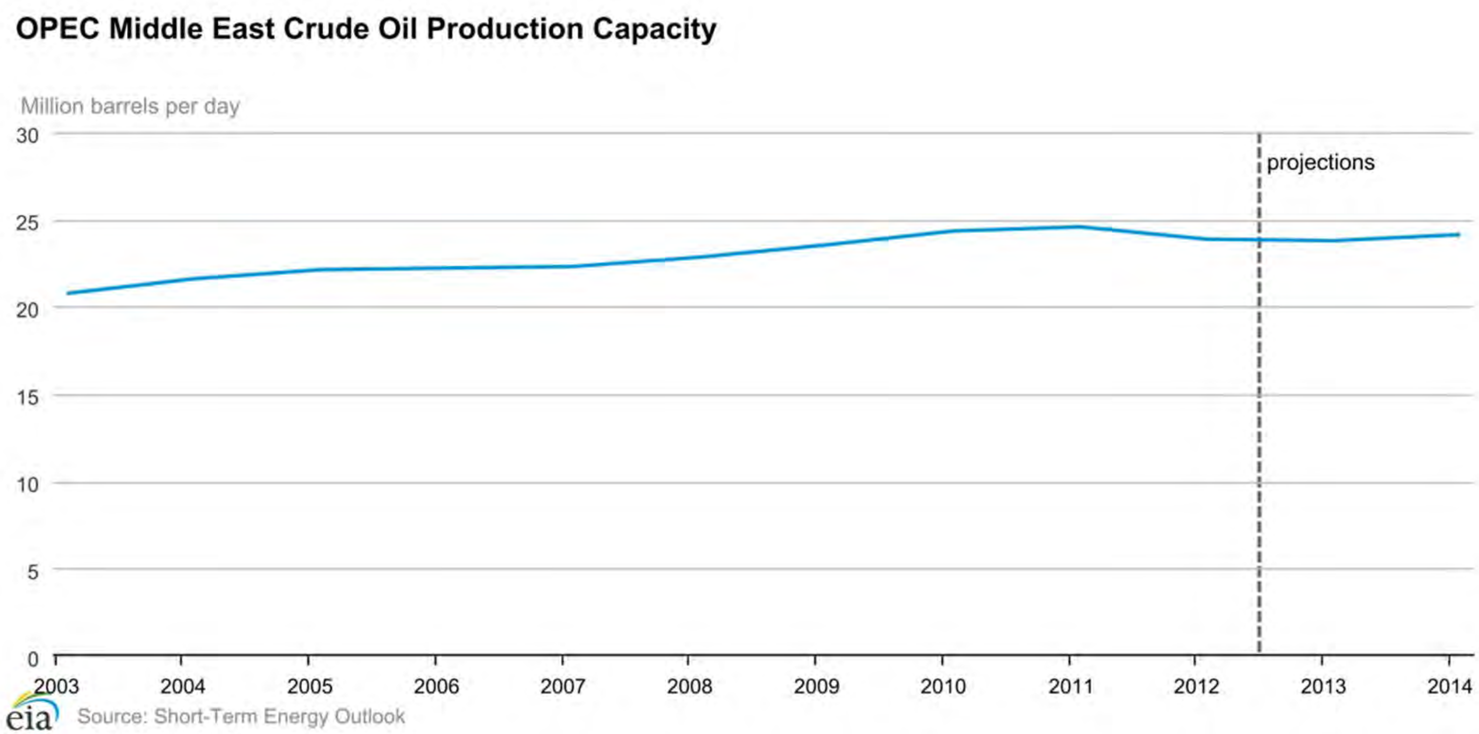
The Real World Limits to Oil Production-II



Source: ***US Department of Energy, Energy Information Agency, Short Term Energy Outlook, August 2013,*** http://www.eia.gov/forecasts/steo/query/

Figure 5

OPEC Net Oil Export Revenues

Available OPEC net oil export revenues

	Nominal (billion $)				Real (billion 2005$)			
Country	2012	2013	2014	Jan-Jun 2013	2012	2013	2014	Jan-Jun 2013
Algeria	$62	--	--	$29	$52	--	--	$24
Angola	$68	--	--	$33	$58	--	--	$28
Ecuador	$10	--	--	$5	$8	--	--	$4
Iran	--	--	--	--	--	--	--	--
Iraq	$83	--	--	$43	$71	--	--	$36
Kuwait	$88	--	--	$44	$75	--	--	$37
Libya	$51	--	--	$24	$43	--	--	$20
Nigeria	$93	--	--	$42	$79	--	--	$35
Qatar	$55	--	--	$26	$46	--	--	$22
Saudi Arabia	$311	--	--	$142	$265	--	--	$119
UAE	$100	--	--	$48	$85	--	--	$40
Venezuela	$62	--	--	$30	$52	--	--	$25
Available OPEC	$982	$940	$903	$466	$835	$788	$744	$391

Source: ***UAS Department of Energy, Energy Information Agency, July 22, 2013, accessed August 6, 2013***
http://www.eia.gov/countries/regions-topics.cfm?fips=OPEC&trk=c&scr=email

OPEC Per Capita Net Oil Export Revenues

OPEC per capita net oil export revenues

	Nominal ($)				Real (2005$)			
Country	2012	2013	2014	Jan-Jun 2013	2012	2013	2014	Jan-Jun 2013
Algeria	$1,740	--	--	$816	$1,480	--	--	$684
Angola	$5,002	--	--	$2,384	$4,254	--	--	$1,998
Ecuador	$683	--	--	$321	$581	--	--	$269
Iran	--	--	--	--	--	--	--	--
Iraq	$2,675	--	--	$1,349	$2,275	--	--	$1,131
Kuwait	$29,440	--	--	$14,362	$25,037	--	--	$12,037
Libya	$7,591	--	--	$3,572	$6,456	--	--	$2,994
Nigeria	$611	--	--	$274	$520	--	--	$229
Qatar	$54,071	--	--	$25,412	$45,984	--	--	$21,298
Saudi Arabia	$10,315	--	--	$4,662	$8,773	--	--	$3,907
UAE	$18,754	--	--	$8,744	$15,949	--	--	$7,328
Venezuela	$2,195	--	--	$1,060	$1,866	--	--	$888
OPEC	--	--	--	--	--	--	--	--

Source: ***US Department of Energy, Energy Information Agency, July 22, 2013, accessed August 6, 2013,*** ***http://www.eia.gov/countries/regions-topics.cfm?fips=OPEC***

Population Growth

Demographics Threaten the Stability of Many MENA States

Demographic Pressures

- Rapid population growth places additional strains on states already suffering from sluggish economic growth, and creates critical problems in terms of the future of the region's youth, its ability to gain productive employment, and social factors like marriage and child raising.
- The following tables illustrate how there has been massive population growth since 1950, and growth is projected to continue through at least 2030 and continue to have a major impact through 2050.
- What the tables cannot show is that this growth has led to major population movements, dislocation and hyperurbanization. It has created serious direct and indirect unemployment and jobs without meaningful productivity gain while creating social pressures to focus on male employment to the exclusion of women.
- It has also led to grossly swollen state sector employment, including inefficient state industries as well as distorted the employment levels in service industries.
- It has put broad pressure on the number of people working in agriculture at time when MENA countries need economies of scale and capital, not more farmers.
- At the same time, population growth has put a massive strain on both natural and government resources, including water, energy (including consumption of potential petroleum exports), education, and health.

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UNDP Estimate of Population Growth: 1970-2015

Country/Region	1970	1980	1990	2000	2005	Projected Est.		Average Annual Growth Rates			
						2010	2015	1970-80	1980-90	1990-00	2000-10
Algeria	13,746	18,811	25,283	30,506	32,855	35,423	38,088	3.2%	3.0%	1.9%	1.5%
Bahrain	220	347	493	650	728	807	882	4.7%	3.6%	2.8%	2.2%
Comoros	238	329	438	552	616	691	767	3.3%	2.9%	2.3%	2.3%
Djibouti	162	340	560	730	805	879	953	7.7%	5.1%	2.7%	1.9%
Egypt	35,575	44,433	57,785	70,174	77,154	84,474	91,778	2.2%	2.7%	2.0%	1.9%
Iraq	10,210	14,024	18,079	24,652	28,238	31,467	35,884	3.2%	2.6%	3.1%	2.5%
Jordan	1,623	2,225	3,254	4,853	5,566	6,472	6,957	3.2%	3.9%	4.1%	2.9%
KSA	5,745	9,604	16,259	20,808	23,613	26,246	28,933	5.3%	5.4%	2.5%	2.3%
Kuwait	744	1,375	2,143	2,228	2,700	3,051	3,378	6.3%	4.5%	0.4%	3.2%
Lebanon	2,443	2,785	2,974	3,772	4,082	4,255	4,426	1.3%	0.7%	2.4%	1.2%
Libya	1,994	3,063	4,365	5,346	5,923	6,546	7,158	4.4%	3.6%	2.0%	2.0%
Mauritania	1,149	1,525	1,988	2,604	2,985	3,366	3,732	2.9%	2.7%	2.7%	2.6%
Morocco	15,310	19,567	24,808	28,827	30,495	32,381	34,330	2.5%	2.4%	1.5%	1.2%
Oman	747	1,187	1,843	2,402	2,618	2,905	3,198	4.7%	4.5%	2.7%	1.9%
OPT	1,096	1,476	2,154	3,149	3,762	4,409	5,090	3.0%	3.9%	3.9%	3.4%
Qatar	111	229	467	617	885	1,508	1,630	7.5%	7.4%	2.8%	9.3%
Somalia	3,600	6,434	6,596	7,394	8,354	9,359	10,731	6.0%	0.2%	1.1%	2.4%
Sudan	15,039	20,509	27,091	34,904	38,698	43,192	47,730	3.2%	2.8%	2.6%	2.2%
Syria	6,371	8,971	12,721	16,511	19,121	22,505	24,494	3.5%	3.6%	2.6%	3.1%
Tunisia	5,127	6,457	8,215	9,452	9,878	10,374	10,884	2.3%	2.4%	1.4%	0.9%
UAE	225	1,015	1,867	3,238	4,089	4,707	5,193	16.3%	6.3%	5.7%	3.8%
Yemen	6,391	8,381	12,314	18,182	21,024	24,256	27,819	2.7%	3.9%	4.0%	2.9%
GCC	7,792	13,757	23,072	29,943	34,633	39,224	43,214	5.8%	5.3%	2.6%	2.7%
LDC	26,579	37,518	48,987	64,366	72,482	81,743	91,732	3.5%	2.7%	2.8%	2.4%
Maghreb	36,177	47,898	62,671	74,131	79,151	84,724	90,460	2.8%	2.7%	1.7%	1.3%
Mashreq	57,318	73,914	96,967	123,111	137,923	153,582	168,629	2.6%	2.8%	2.4%	2.2%
AC	127,866	173,087	231,697	291,551	324,189	359,273	394,035	3.1%	3.0%	2.3%	2.1%
EAP	971,537	1,200,000	1,300,000	1,500,000	1,500,000	1,600,000	1,600,000	2.1%	0.8%	1.4%	0.6%
LAC	286,472	362,655	442,310	521,228	556,512	588,649	618,486	2.4%	2.0%	1.7%	1.2%
SAS	283,267	355,774	439,591	517,193	554,079	589,615	622,911	2.3%	2.1%	1.6%	1.3%
SSA	294,963	389,754	518,053	674,842	764,328	863,314	970,173	2.8%	2.9%	2.7%	2.5%
DR	3,700,000	4,400,000	5,300,000	6,100,000	6,500,000	6,900,000	7,300,000	1.7%	1.9%	1.4%	1.2%

Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2008 Revision, http://esa.un.org/unpp. December 25, 2010

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, pp. 136.

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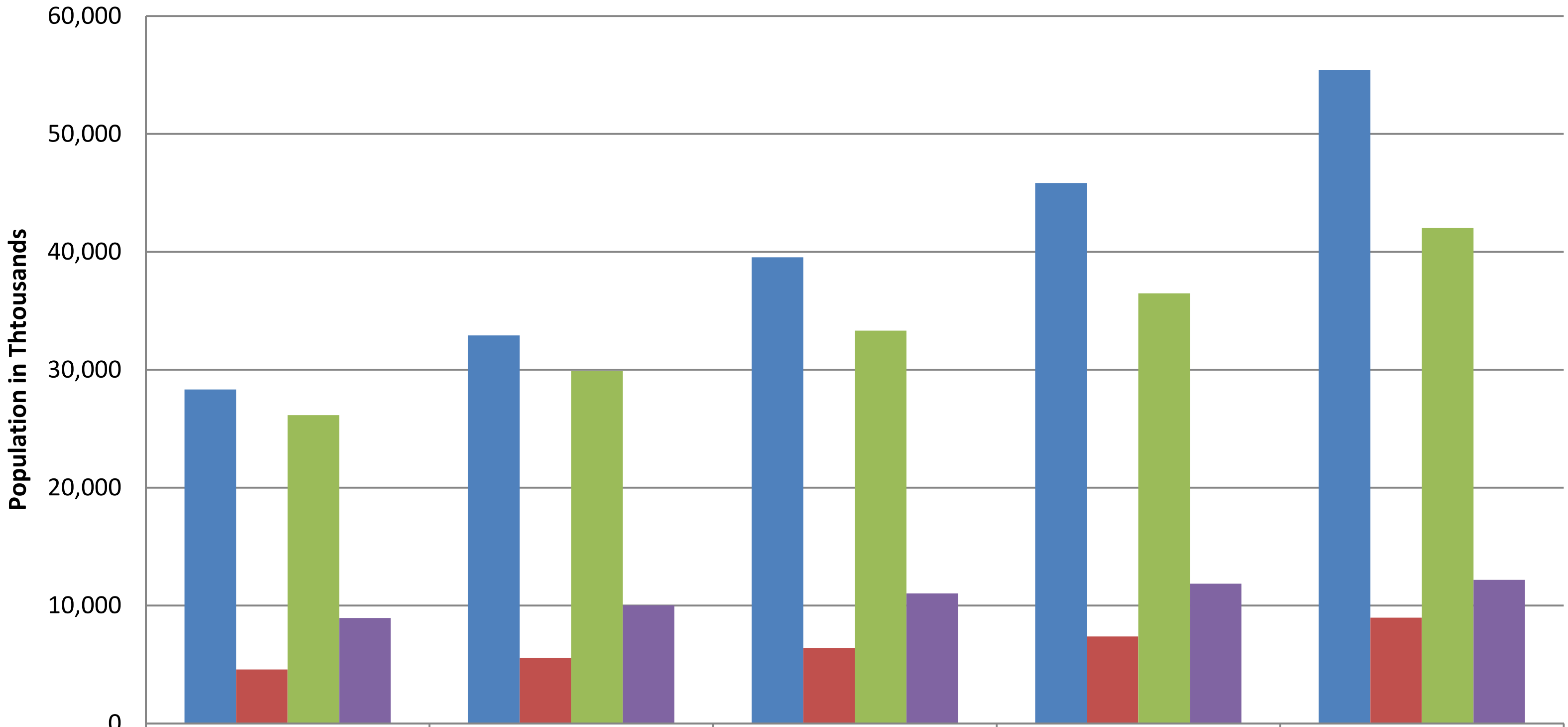
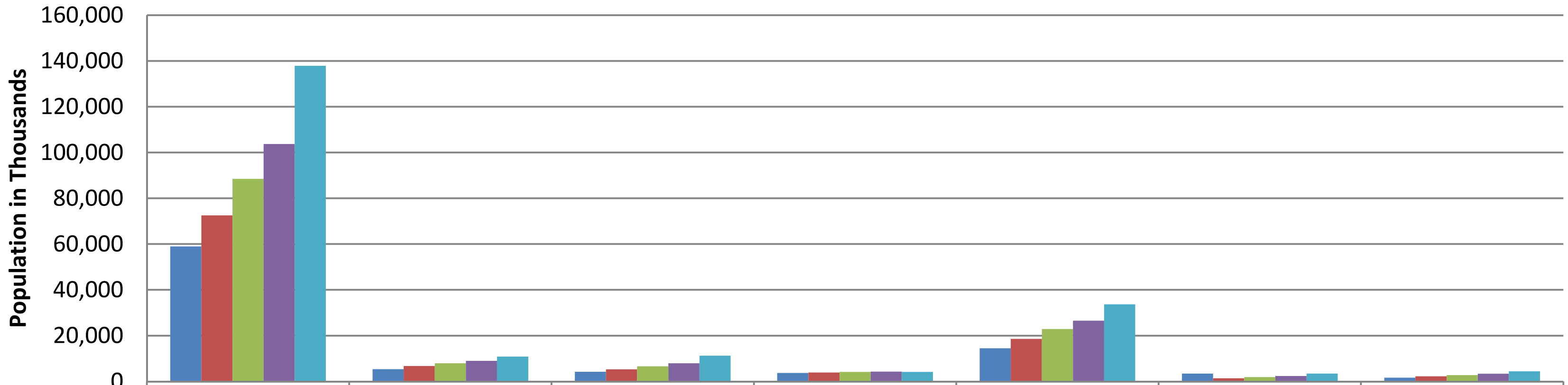
North African Demographic Pressure: 1995-2050



	1995	2005	2015	2025	2050
Algeria	28,322	32,918	39,542	45,841	55,445
Libya	4,584	5,570	6,412	7,375	8,971
Morocco	26,148	29,901	33,323	36,484	42,026
Tunisia	8,947	10,013	11,037	11,850	12,180

Source: United States Census Bureau, International Data Base, Accessed August 6, 2013.
http://www.census.gov/population/international/data/idb/region.php?N=%20Results%20&T=13&A=separate&RT=0&Y=2050&R=113&C=AG

Arab-Israeli Demographic Pressure: 1995-2050 (In Millions)



	Egypt	Israel	Jordan	Lebanon	Syria	Gaza Strip	West Bank
1995	58,945	5,353	4,176	3,654	14,449	3,393	1,621
2005	72,544	6,743	5,245	3,892	18,563	1,350	2,247
2015	88,487	7,935	6,623	4,151	22,879	1,869	2,785
2025	103,742	8,984	7,945	4,307	26,536	2,350	3,328
2050	137,873	10,828	11,243	4,155	33,658	3,393	4,376

Source: United States Census Bureau, International Data Base, Accessed August 6, 2013.
http://www.census.gov/population/international/data/idb/region.php?N=%20Results%20&T=13&A=separate&RT=0&Y=2050&R=124&C=AG

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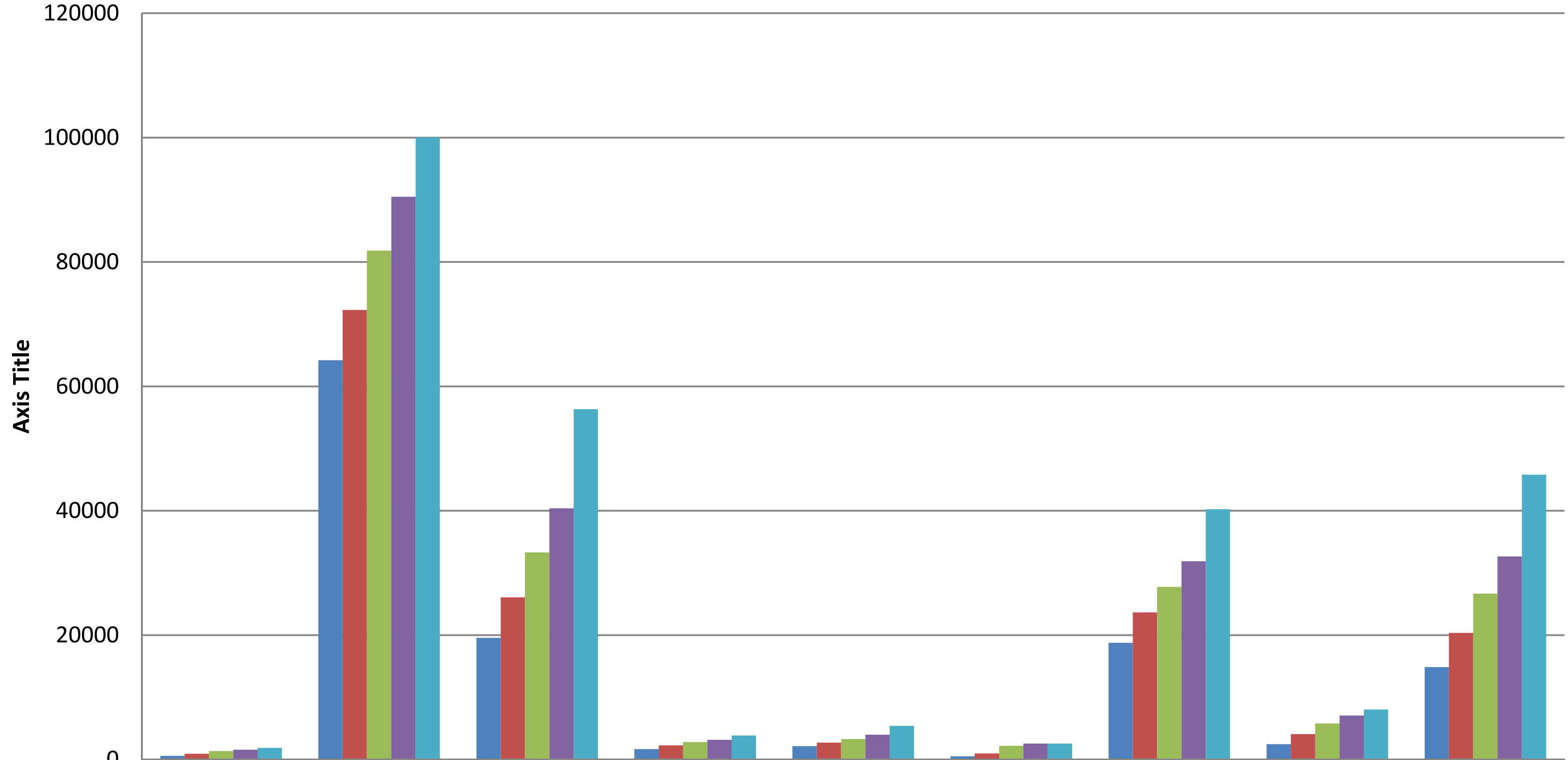
Gulf Demographic Pressure: 1995-2050



	Bahrain	Iran	Iraq	Kuwait	Oman	Qatar	Saudi Arabia	UAE	Yemen
1995	582	64,217	19,564	1,664	2,139	510	18,755	2,458	14,862
2005	916	72,283	26,076	2,257	2,697	973	23,642	4,087	20,345
2015	1,347	81,824	33,310	2,789	3,287	2,195	27,752	5,780	26,667
2025	1,580	90,481	40,387	3,169	3,981	2,563	31,877	7,063	32,650
2050	1,847	100,045	56,316	3,863	5,402	2,559	40,251	8,019	45,781

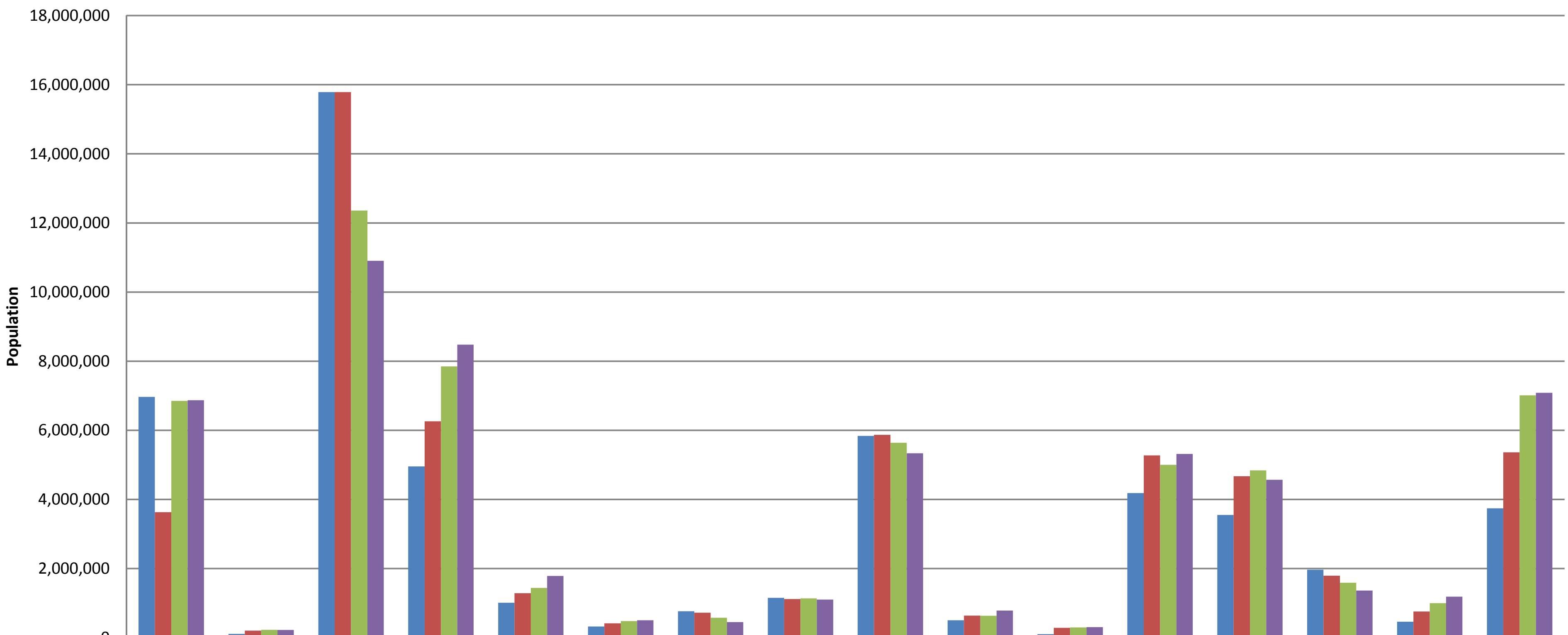
Source: United States Census Bureau, International Data Base, Accessed August 6, 2013; http://www.census.gov/population/international/data/idb/region.php?N=%20Results%20&T=13&A=separate&RT=0&Y=2050&R=124&C=AG;

"Youth Bulge"

The population data in the following tables shows just how critical the "youth bulge" now is in the MENA region even though population growth rates have dropped. The problem is now very much the problem of the "already born:"

- **Breakdown in education quality and its quality and relevance.**
- **Extremely young populations with major lag in jobs, marriage, and housing.**
- **Low expectations for the future.**
- **Closing windows of security and state sector employment.**
- **Major problems in saving and in funding business.**
- **Pressure to leave the land.**
- **Disguised unemployment and hollow jobs with no productivity gain or real career prospects and motivation.**
- **Dissatisfaction with failed governance and secular alternative, and cause of religious extremism.**
- **Cutting edge cause of pressure on ethnic, sectarian, and tribal discrimination, corruption, nepotism, and favoritism.**

MENA Youth (Ages 15-24) Through 2050



	Algeria	Bahrain	Iran	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE	Yemen
2000	6,967,518	108,706	15,787,023	4,955,982	1,008,623	321,496	763,606	1,151,346	5,838,114	501,867	97,606	4,184,317	3,550,333	1,964,486	459,824	3,743,744
2013	3,629,225	203,575	15,787,308	6,258,634	1,286,827	415,182	721,615	1,114,608	5,869,896	636,201	283,506	5,274,087	4,672,502	1,790,443	755,668	5,361,445
2025	6,850,359	225,008	12,357,856	7,849,603	1,438,401	479,848	573,986	1,134,985	5,639,624	632,650	296,020	5,000,591	4,838,393	1,586,751	998,228	7,012,091
2050	6,870,243	221,792	10,902,365	8,479,041	1,784,399	503,420	448,116	1,102,609	5,334,757	781,176	303,473	5,313,844	4,565,597	1,360,270	1,185,939	7,084,760

Source: U.S. Census Bureau, International Data Base, accessed August 6, 2013, http://www.census.gov/population/international/data/idb/informationGateway.php

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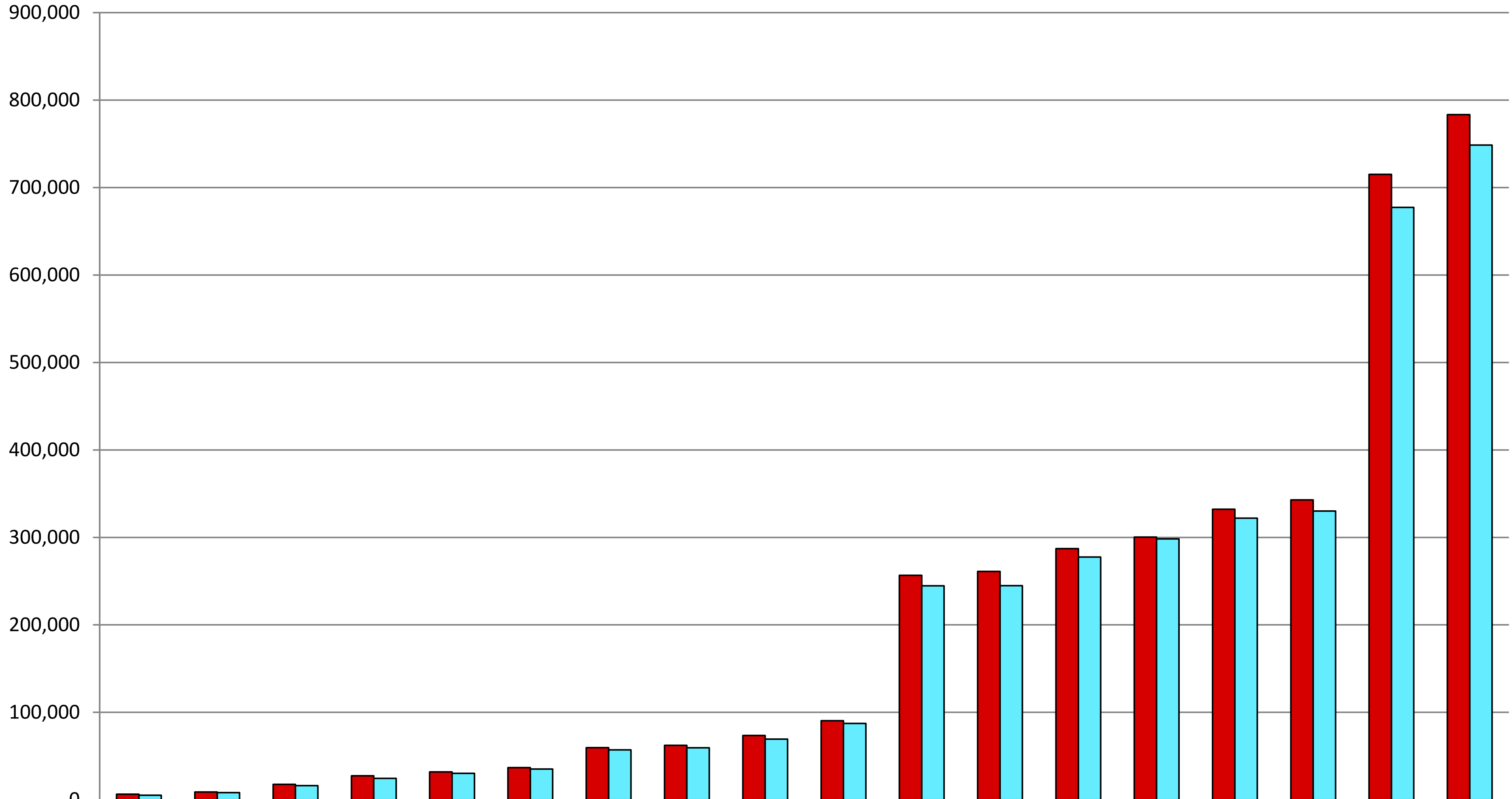
MENA Young Persons Entering Labor Force Each Year



	Qatar	Bahrain	Kuwait	UAE	Oman	Lebanon	Libya	Israel	Jordan	Tunisia	Syria	Saudi Arabia	Yemen	Morocco	Iraq	Algeria	Iran	Egypt
Men	6,429	8,988	17,653	27,439	31,959	36,856	59,547	62,304	73,574	90,436	256,698	261,105	287,141	300,327	332,194	342,895	715,111	783,405
Women	5,162	8,117	16,232	24,419	30,264	35,121	57,070	59,418	69,420	87,346	244,712	244,763	277,612	298,366	322,010	330,098	677,372	748,647

Source: CIA World Factbook, Accessed January 2011
https://www.cia.gov/library/publications/the-world-factbook/index.html

Youth and The Unemployment Challenge

Table 22. Unemployment rates, total unemployment for the age group (15+), 1990-2011

Country/ Region	Base Yr	Latest Yr	Total		Male		Female	
			Base	Latest	Base	Latest	Base	Latest
Algeria	2001	2008	27.3	11.3	26.6	11.19	31.4	12.05
Bahrain	1991	2001	6.4	5.5	5.2	4.1	11.8	10.5
Egypt	1998	2007	8.2	8.9	5.1	5.9	19.9	18.6
KSA	2002	2008	5.3	5.1	4.2	3.5	11.5	13.8
Kuwait	1995	2005	2.1	2.0	2.4	2.0	1.5	1.8
Lebanon	2004	2007	8.1	9.0	6.9	8.6	7.7	10.1
Morocco	1990	2009	15.8	10.0	14.2	9.8	20.4	10.5
Syria	2002	2010	11.7	8.4	8.3	5.7	24.1	22.5
Tunisia	1997	2011	15.9	18.3	15.5	15	17.3	27.4
UAE	1995	2008	1.8	4.0	1.7	2.0	2.4	12.0
Yemen	1994	1999	8.3	11.5	9.3	12.48	3.1	8.2
GCC			4.5	4.6	3.6	3.0	8.9	11.6
LDC			8.3	11.5	9.3	12.5	3.9	8.2
Maghreb			22.3	11.9	21.7	11.2	24.4	14.3
Mashreq			9.0	8.9	5.9	6.0	20.0	18.7
AC			12.2	9.3	10.4	7.7	18.9	15.5

Source: Kilmnet and UN Data and National Institute for Statistics for Tunisia

Table 23. Unemployment rates, total unemployment for the age group (15-24), 1990-2011

Country/ Region	Base Yr	Latest Yr	Total		Male		Female	
			Base	Latest	Base	Latest	Base	Latest
Algeria	2001	2008	47.8	23.8	48.8	23.5	49.9	25.4
Bahrain	1991	2001	25.4	20.1	22.4	17.2	33.9	27.0
Egypt	1998	2007	23.1	24.8	15.8	17.2	42.8	47.9
KSA	2002	2008	28.1	29.3	25.2	24.1	39.1	50.0
Kuwait	1995	2005	13.2	11.3	15.6	11.8	7.6	10.0
Lebanon	2004	2007	20.9	22.1	20.3	22.3	19.0	21.5
Morocco	1990	2009	31.1	21.9	30.9	22.8	31.6	19.4
Syria	2002	2010	26.3	19.1	21.4	13.1	38.9	49.1
Tunisia	1997	2011	31.9	42.3	33.3	43.2	29.0	18.0
UAE	1995	2008	6.3	12.1	6.4	7.9	5.7	21.8
Yemen	1994	1999	17.9	19.9	20.2	20.7	9.8	17.3
GCC			22.8	23.3	20.8	19.4	29.9	35.9
LDC			17.9	19.9	20.2	20.7	9.8	17.3
Maghreb			41.0	25.5	42.1	25.5	37.6	25.5
Mashreq			24.0	23.7	17.7	17.0	40.6	45.9
AC			29.2	23.8	26.4	20.4	37.0	35.2

Source: ibid
Note: For Algeria and Tunisia, share of male and female of total labour force and employed for latest year available was used to estimate the youth unemployment rate by gender for 2008 and 2011 respectively.

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, pp. 144.

Arab Development Challenges Report: Employment, Social Protection & Fiscal Policy

- **Employment gains despite demographic pressures**

  - **High average fertility rates** (3.1 children per woman) provide the basis for high population growth expectations

  - **The Arab region is going through a demographic transition, with more participants entering the labor force each year (in 2010, ages 15-64 made up 62.45% of the Arab Population)**

- **Employment in Arab countries** has averaged an impressive 3.3% annual growth rate, amongst the highest in developing regions. However, they also **exhibit one of the lowest labor force participation rates in the world** (due to low female participation rates)
- **The Arab region has one of the highest unemployment rates among developing regions— 9.3% (2001-11), vs. 6.6% for developing regions over the same period**. However, this rate has improved from the 1990s when it averaged 12%.
  - The unemployment rate in the GCC is roughly half that in Mashreq countries.
  - **Youth unemployment in the region, at 24%, is double the world average**.
  - While youth employment has been increasing, growth in the **youth population has been outpacing employment growth such that the employment/population ratio has declined from 27.1% to 24.3% (1997-2009), which is among the lowest rates in the world**.
- **The female unemployment rate is the highest in the world**. This is due to more females progressing through higher education and entering the labor force than before only to be faced with issues such as gender bias in hiring, for example.
- **There is an increase in the Arab region's informal job market** (i.e. jobs outside of social security programs; self employment was used as a proxy for measurement)
- **The education system fails to produce graduates with the requisite skills to find meaningful, productive jobs**

Source: UNDP (2011) "Arab Development Challenges Report: Towards the Developmental State in The Arab Region", P.17- 60, United Nations Development Programme, Regional Center for Arab States, Cairo; Azar, NBK, May 2012.

Demand Side Constraints to Arab Employment

“Arab unemployment is fundamentally a demand-side problem. […] the growth return of education is low since misguided policies do not enable the country to translate the accumulated knowledge into ideas, innovations, and new productive activities.”

Investment has failed to generate sufficient growth in the Arab region (gross fixed capital formation (GFCF), has increased slightly but total employment has remained constant), and this is due to the ineffectiveness of these investments to generate high skilled, meaningful output-contributing jobs. Low wage premiums also cause human capital flight, while remaining workers are often inadequately trained.

Expected requirements for solving the job creation deficit (excluding GCC) :

Scenario 1: keep unemployment in the Arab region constant with no change in labor force participation rate

Scenario 2: cut the unemployment rate by half in the Arab region

Scenario 3: cut the unemployment rate by half and increase female employment to 35%

	2011-2015		2011-2020		2011-2030	
	Jobs required in millions	GFCF required in $ millions	Jobs required in millions	GFCF required in $ millions	Jobs required in millions	GFCF required in $ millions
Scenario 1	6.1	292,800	15.4	739,200	24.7	1,185,600
Scenario 2	13.6	652,800	24.1	1,156,800	47.1	2,260,800
Scenario 3	28.6	1,372,800	40.8	1,958,400	91.8	4,406,400

Note: GFCF=gross fixed capital formation measured in 2005 constant prices; excludes costs of upgrading the conditions of the working poor; $48,000 average cost of creating one job

Source: UNDP (2011) “Arab Development Challenges Report: Towards the Developmental State in The Arab Region”, P.17-60, United Nations Development Programme, Regional Center for Arab States, Cairo; Azar, NBK, May 2012.

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The Job Creation Challenge: New Jobs Required

Table 24. Projected number of jobs required under the different scenarios in 2015, 2020 and 2030

Country/ Region	Year	Unemployment Rate	LFPR	Labour Force	No. of Unemployed	No. of Employed	Working-Age Pop.	Scenario (1)			Scenario (2)			Scenario (3)		
								2015	2020	2030	2015	2020	2030	2015	2020	2030
Algeria	2007	11.3	58.3	14,486	1,637	12,849	24,835	921	2,005	4,110	2,777	4,024	6,366	3,757	6,157	10,740
Bahrain	2001	5.5	65.4	314	17	296	480	38	83	143	63	110	173	103	199	327
Egypt	2008	9.4	48.8	27,411	2,573	24,838	56,183	2,119	5,012	10,658	5,004	8,227	14,403	8,629	16,801	32,636
Jordan	2004	12.9	49.3	2,040	263	1,777	4,139	169	525	1,197	475	940	1,699	761	1,829	3,729
KSA	2008	5.0	54.6	9,234	461	8,773	16,912	1,037	2,293	4,445	1,592	2,910	5,169	3,427	6,967	13,033
Kuwait	2005	2.0	69.4	1,428	28	1,400	2,059	141	311	587	176	349	630	287	595	1,093
Lebanon	2007	9.0	45.4	1,391	125	1,266	3,064	86	148	204	227	295	356	378	553	710
Mauritania	2000	20.6	68.5	1,030	212	818	1,505	149	351	776	471	715	1,227	584	982	1,816
Morocco	2008	10.0	52.3	11,982	1,199	10,783	22,910	714	1,455	2,728	2,030	2,868	4,268	3,079	5,006	8,277
Syria	2007	8.4	50.3	6,624	558	6,066	13,166	853	1,291	2,368	1,577	2,052	3,220	2,343	4,894	11,174
Tunisia	2005	14.2	47.7	3,503	499	3,004	7,344	172	308	511	752	907	1,139	1,029	1,404	1,962
UAE	2008	4.0	77.6	2,813	113	2,700	3,626	259	593	1,189	392	740	1,360	618	1,256	2,396
Yemen	2004	15.0	46.6	5,954	893	5,061	12,785	965	2,597	6,084	2,109	4,146	8,156	4,103	9,515	20,732
AC		9.7	52.9	88,210	8,578	79,632	169,009	7,623	16,972	34,999	17,644	28,283	48,167	29,097	56,158	108,627
GCC		4.5	61.1	13,788	619	13,170	23,077	1,475	3,280	6,364	2,222	4,109	7,333	4,435	9,017	16,849
LDC		15.8	49.8	6,984	1,106	5,879	14,290	1,114	2,948	6,859	2,580	4,862	9,383	4,687	10,497	22,548
Maghreb		11.1	54.7	29,971	3,335	26,636	55,090	1,807	3,768	7,349	5,558	7,798	11,773	7,865	12,567	20,980
Mashreq		9.4	49.0	37,466	3,519	33,947	76,552	3,227	6,975	14,427	7,284	11,514	19,678	12,110	24,077	48,250
AC excluding GCC		10.7	51.3	74,421	7,959	66,462	145,932	6,148	13,692	28,635	15,421	24,174	40,834	24,662	47,141	91,777

Source: Authors' estimates based on data from UNSD and Kilmnet, ILO
Notes: This table shows the projected number of jobs required under three different scenarios, scenario 1: if to keep unemployment rate constant, scenario 2: if to reach full employment, scenario 3: if to achieve full employment as well as higher female labour participation rate. Using projected rates of growth in working-age population by UNSD and holding constant the labour force participation rate and unemployment rate, we re-estimate the projected increase in the labour force and number of employed to reach the total number of jobs to be created under the aforementioned scenarios (For further details, Abu-Ismail, Abou Taleb, Olmsted and Moheiddin, 2010).

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, pp. 145.

The Job Creation Challenge: Cost of New Jobs

Country/ Region	Cost of New Job (000)	Cost for Scenario 1 (in billions)									Actual GFCF/ GFP 2009	Share of GFCF/GDP								
		Scenario 1			Scenario 2			Scenario 3				Scenario 1			Scenario 2			Scenario 3		
		2015	2020	2030	2015	2020	2030	2015	2020	2030		2015	2020	2030	2015	2020	2030	2015	2020	2030
Algeria	64	59	128	262	177	257	406	240	393	686	38.16	10.3	11.2	11.5	31.1	22.5	17.8	42.1	34.5	30.1
Bahrain	680	26	56	97	43	75	118	70	135	222	24.04	30.4	33.1	28.5	49.9	43.9	34.6	82.4	79.3	65.1
Egypt	36	77	183	389	182	300	525	315	613	1,190	18.31	12.5	14.7	15.7	29.4	24.2	21.2	50.7	49.4	48.0
Jordan	69	12	36	82	33	65	117	52	126	257	28.93	14.3	22.3	25.4	40.3	39.9	36.0	64.6	77.6	79.1
KSA	424	439	971	1,883	674	1,233	2,190	1,452	2,951	5,521	33.75	25.3	28.0	27.1	38.9	35.5	31.6	83.7	85.1	79.6
Kuwait	538	76	167	315	94	188	339	154	320	588	15.15	16.5	18.2	17.2	20.6	20.4	18.4	33.6	34.8	32.0
Lebanon	310	27	46	63	71	92	110	117	172	220	32.12	19.2	16.5	11.4	50.6	32.8	19.8	84.0	61.5	39.5
Mauritania	32	5	11	25	15	23	40	19	32	59	24.91	41.3	48.8	53.8	130.8	99.3	85.1	162.2	136.3	126.0
Morocco	106	75	154	288	214	303	450	325	528	874	31.58	23.0	23.5	22.0	65.4	46.2	34.4	99.3	80.7	66.7
Syria	30	25	38	70	47	61	96	70	146	332	29.33	14.6	11.0	10.1	26.9	17.5	13.7	40.0	41.8	47.7
Tunisia	156	27	48	80	117	141	177	160	219	306	24.09	15.2	13.7	11.3	66.6	40.2	25.2	91.1	62.2	43.4
UAE	662	171	392	787	260	490	900	409	832	1,586	39.82	19.0	21.8	21.8	28.8	27.2	25.0	45.4	46.1	44.0
Yemen	20	19	51	120	42	82	161	81	187	408	13.98	18.0	24.3	28.4	39.4	38.8	38.1	76.7	89.0	96.9
AC	133	1,038	2,283	4,463	1,969	3,308	5,630	3,464	6,653	12,249	30.60	19.3	21.2	20.7	36.6	30.7	26.1	64.3	61.8	56.9
GCC	490	712	1,588	3,083	1,071	1,985	3,547	2,085	4,238	7,917	32.52	22.4	25.0	24.2	33.7	31.2	27.9	65.6	66.6	62.2
LDC	21	24	63	145	57	105	200	100	219	467	15.07	20.4	26.7	31.0	48.6	44.8	42.8	85.3	93.7	99.8
Maghreb	91	161	330	630	509	701	1,034	725	1,140	1,865	33.85	15.0	15.4	14.7	47.4	32.7	24.1	67.6	53.1	43.4
Mashreq	47	141	303	605	333	517	848	554	1,056	2,000	22.95	13.9	14.9	14.9	32.8	25.5	20.9	54.6	52.0	49.3
AC excluding GCC	62	326	695	1,380	898	1,323	2,083	1,379	2,415	4,332	27.84	14.8	15.8	15.6	40.7	30.0	23.6	62.5	54.8	49.1

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, pp. 145.

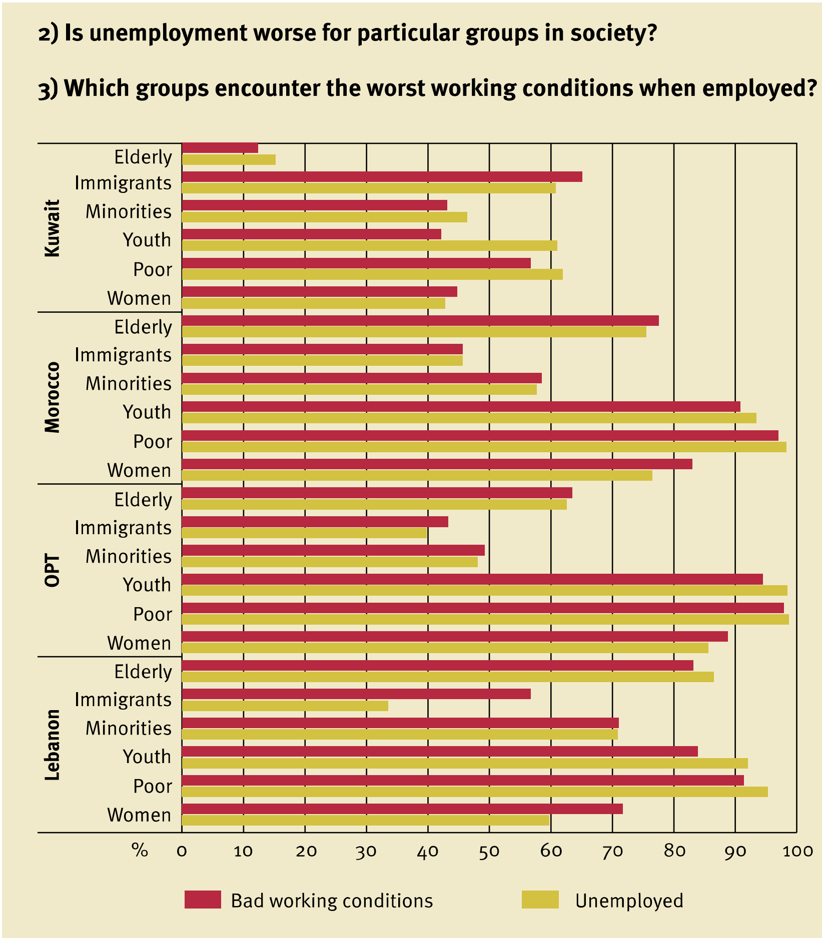
Unemployment and Underemployment are Broad Challenges

- **Governments often fail to report accurately. There are few reliable data on chronic employment, lack of real careers, crony-based employment, lack of productive employment for women.**

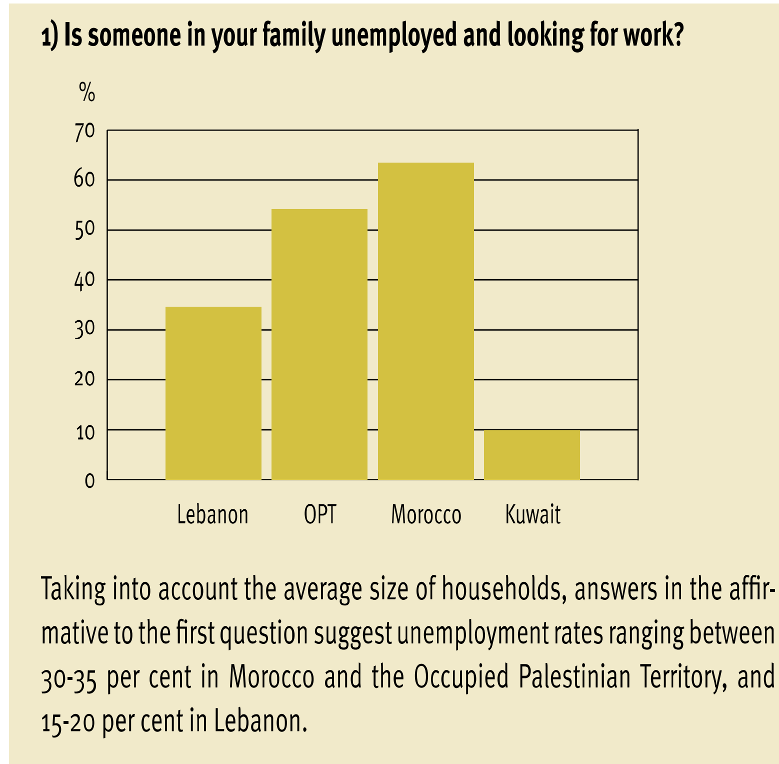
- **No credible data measure underemployment, lack of productivity gain, and impact on given classes, youth, and other key elements of society.**

- **Poverty data are essentially worthless. The threshold is set too low to be currently relevant and data are generally not reported or have no credible source.**

Perceptions of Unemployment in MENA



Percent Unemployed and Looking for Work



Source: Arab Development Report, 2009, p. 110.

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Perceptions of Personal Economic Situation in MENA

Middle East/N. Africa: Percent responding **Good**, all years measured

COUNTRY	2008	2009	2012	2013
Egypt	26	30	23	21
India	-	-	64	-
Israel	-	67	-	59
Jordan	31	37	33	30
Lebanon	31	32	26	30

Middle East/N. Africa: Percent responding **Bad**, all years measured

COUNTRY	2008	2009	2012	2013
Egypt	72	69	76	79
India	-	-	31	-
Israel	-	32	-	38
Jordan	68	63	64	69
Lebanon	67	67	73	70

Full question wording: Now thinking about your personal economic situation, how would you describe it - is it very good, somewhat good, somewhat bad or very bad?

Notes: Good combines "very good" and "somewhat good" responses. Bad combines "somewhat bad" and "very bad."

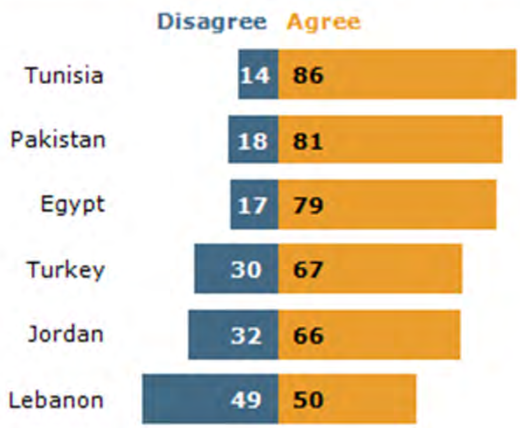
- The Pew Foundation, Global Attitudes Project, Global Indicators Database, Updated July 2013. http://www.pewglobal.org/database/indicator/1/group/6/ Accessed August 12, 2013.

Who Has a Better Life in This Country?

	Men	Women	(Vol) Same	DK
	%	%	%	%
Pakistan	42	14	38	5
Turkey	41	31	25	3
Egypt	36	13	47	4
Jordan	30	22	43	6
Tunisia	28	41	29	2
Lebanon	19	32	45	4

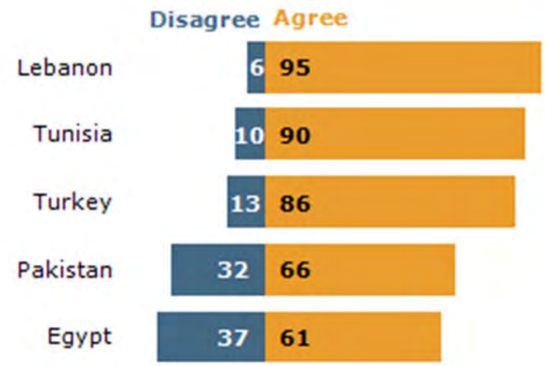
PEW RESEARCH CENTER Q5.

When Jobs Are Scarce, Men Should Have More Right to a Job



PEW RESEARCH CENTER Q86b.

Women Should Be Able to Work Outside the Home



Data for Jordan not shown due to administrative error.

PEW RESEARCH CENTER Q86a.

The Pew Research Center, Global Attitudes Project, July 10, 2012, http://www.pewglobal.org/2012/07/10/most-muslims-want-democracy-personal-freedoms-and-islam-in-political-life/, accessed August 12, 2013

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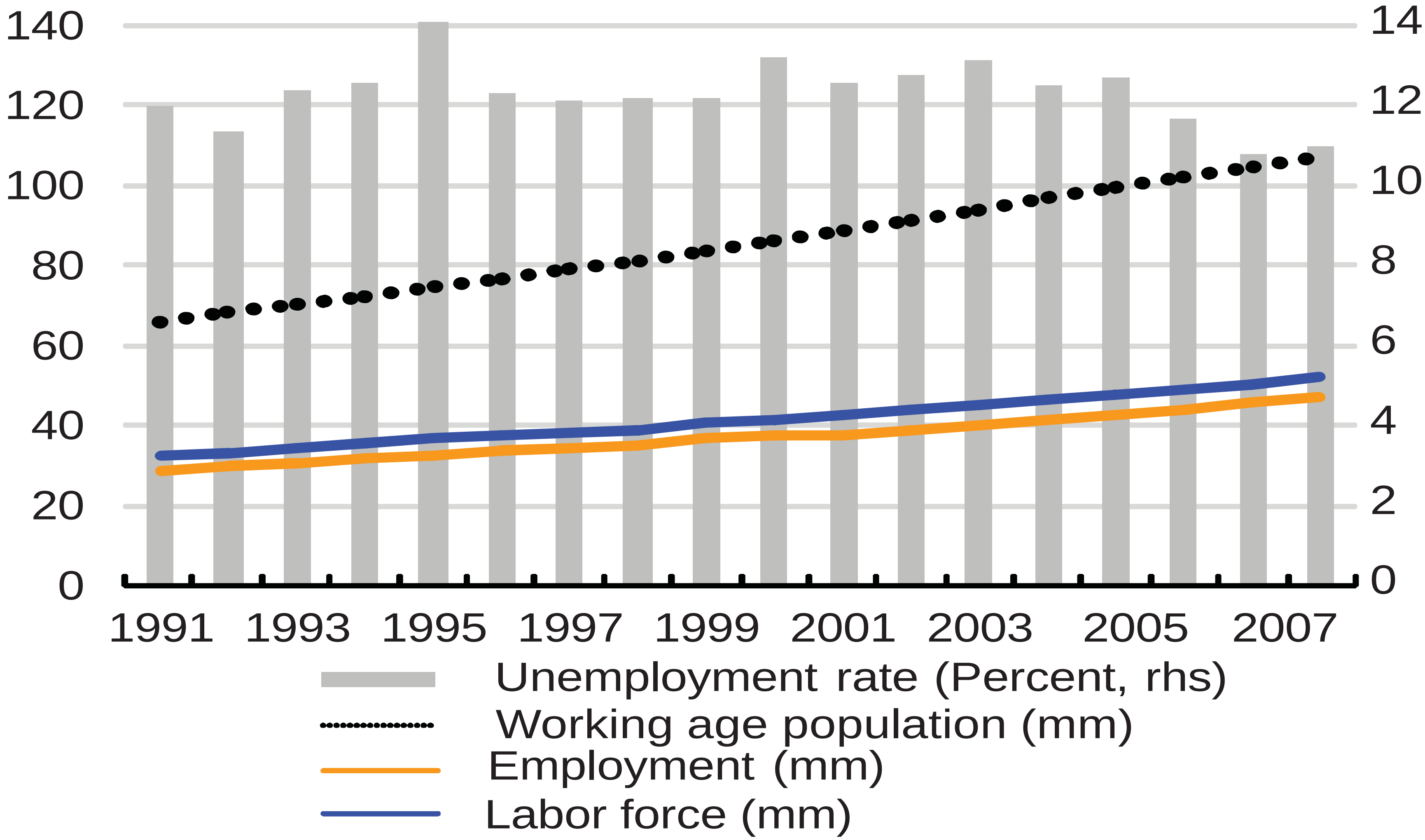
MENA Demographics and Unemployment



Source: IMF, *World Economic and Financial Surveys, Regional Economic Outlook, Middle East and Central Asia*, October 2010, p. 37

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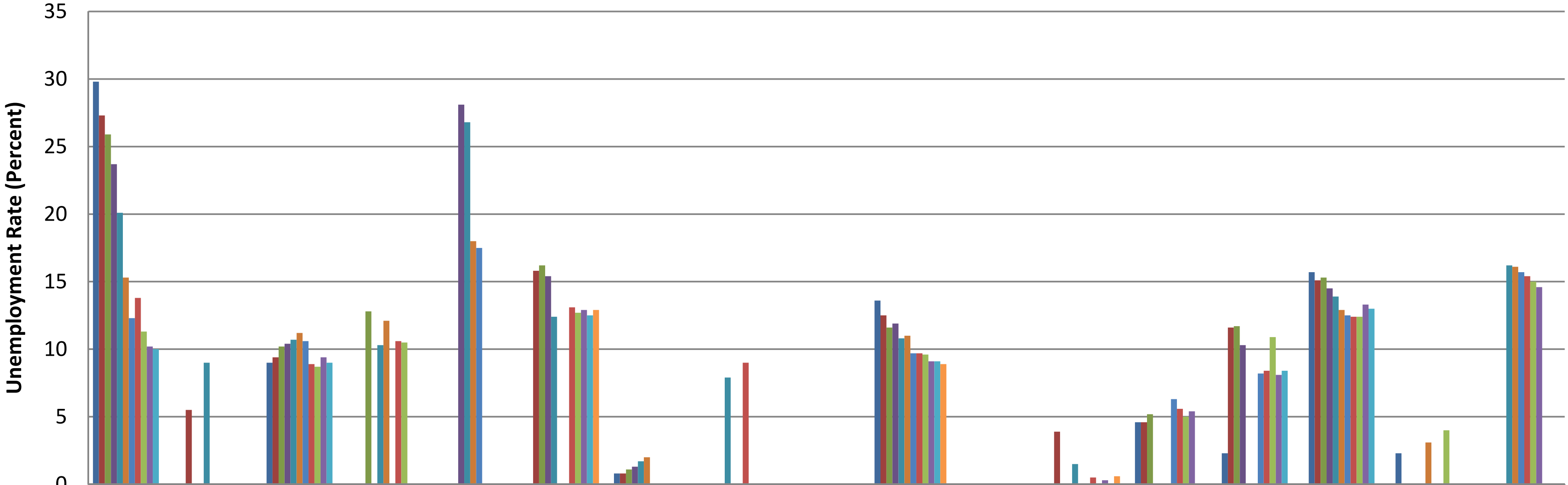
Official Unemployment Rates



	Algeria	Bahrain	Egypt	Iran	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudia Arabia	Syria	Tunisia	UAE	Yemen
2000	29.8	0	9	0	0	0	0.8	0	0	13.6	0	0	4.59	2.3	15.7	2.3	0
2001	27.3	5.5	9.4	0	0	15.8	0.8	0	0	12.5	0	3.9	4.59	11.6	15.1	0	0
2002	25.9	0	10.2	12.8	0	16.2	1.1	0	0	11.6	0	0	5.19	11.7	15.3	0	0
2003	23.7	0	10.4	0	28.1	15.4	1.3	0	0	11.9	0	0	0	10.3	14.5	0	0
2004	20.1	9	10.7	10.3	26.8	12.4	1.7	7.9	0	10.8	0	1.5	0	0	13.9	0	16.2
2005	15.3	0	11.2	12.1	18	0	2	0	0	11	0	0	0	0	12.9	3.1	16.1
2006	12.3	0	10.6	0	17.5	0	0	0	0	9.7	0	0	6.3	8.2	12.5	0	15.7
2007	13.8	0	8.9	10.6	0	13.1	0	9	0	9.7	0	0.5	5.59	8.4	12.4	0	15.4
2008	11.3	0	8.7	10.5	0	12.7	0	0	0	9.6	0	0	5	10.9	12.4	4	15
2009	10.2	0	9.4	0	0	12.9	0	0	0	9.1	0	0.3	5.4	8.1	13.3	0	14.6
2010	10	0	9	0	0	12.5	0	0	0	9.1	0	0	0	8.4	13	0	0
2011	0	0	0	0	0	12.9	0	0	0	8.9	0	0.6	0	0	0	0	0
2012	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: The World Bank, dataBank, Accessed August 7, 2013. http://databank.worldbank.org/ddp/home.do?Step=3&id=4

A Very Young Population, a "Youth Bulge," and Underemployment are Key Threats to Stability

Massive pressure on education, jobs, marriage, housing, low to mid-income families, and perceptions about governance, fairness and corruption

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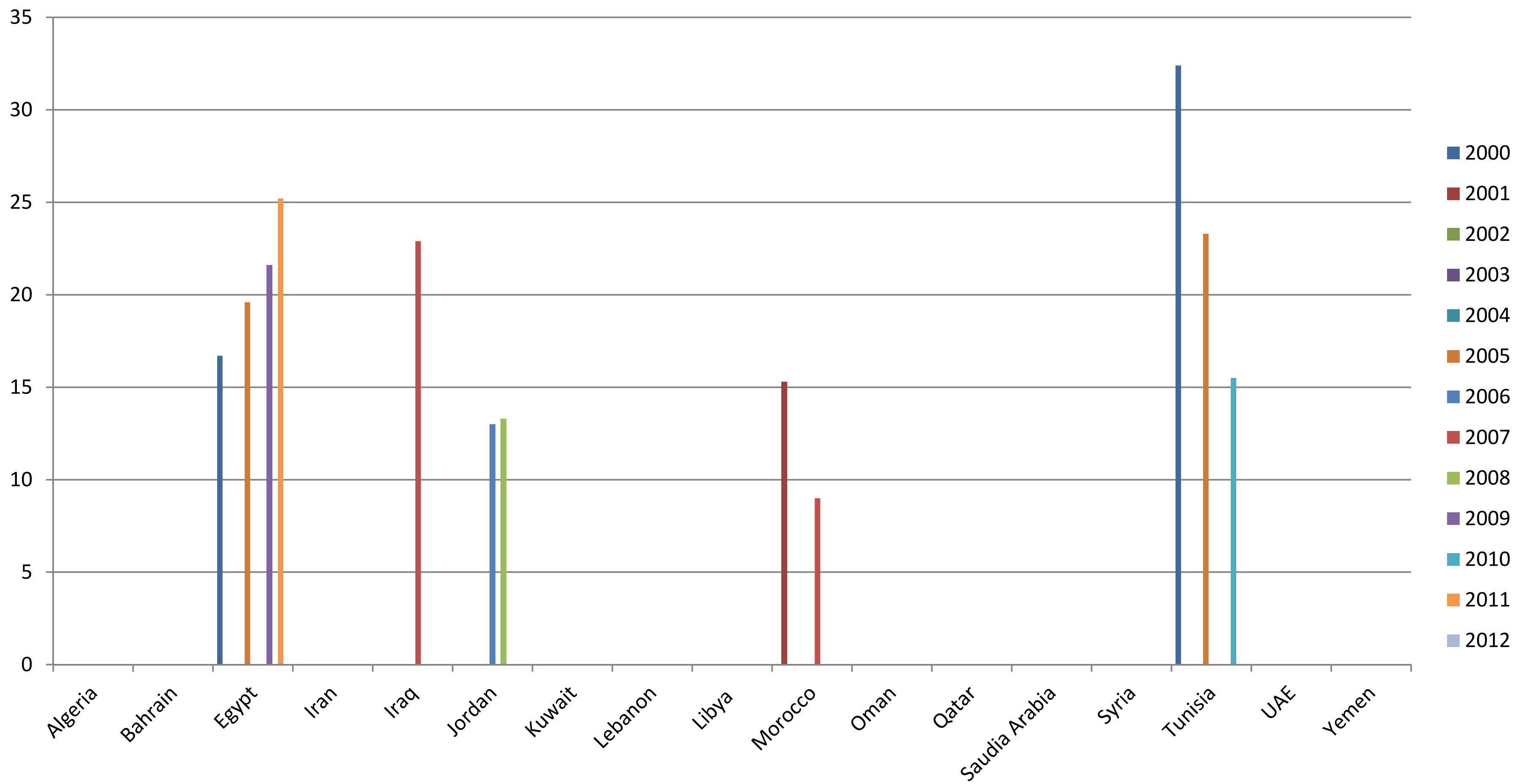
Population Below Poverty Line
(In Percent)



Source: World Bank, dataBank, Accessed August 8, 2012
Note: Not all poverty figures are available.

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Poverty Trends by Region and MENA Country

Table 5-4 Incidence of income poverty – world regions compared, 1981-2005 (percentage living below two dollars a day)

Region	1981	1984	1987	1990	1993	1996	1999	2002	2005
East Asia and Pacific	92.6	88.5	81.6	79.8	75.8	64.1	61.8	51.9	38.7
Of which China	97.8	92.9	83.7	84.6	78.6	65.1	61.4	51.2	36.3
Eastern Europe and Central Asia	8.3	6.5	5.6	6.9	10.3	11.9	14.3	12	8.9
Latin America and Caribbean	22.5	25.3	23.3	19.7	19.3	21.8	21.4	21.7	16.6
Middle East and North Africa	26.7	23.1	22.7	19.7	19.8	20.2	19	17.6	16.9
South Asia	86.5	84.8	83.9	82.7	79.7	79.9	77.2	77.1	73.9
Of which India	86.6	84.8	83.8	82.6	81.7	79.8	78.4	77.5	75.6
Sub-Saharan Africa	74	75.7	74.2	76.2	76	77.9	77.6	75.6	73
Total	69.2	67.4	64.2	63.2	61.5	58.2	57.1	53.3	47
Arab countries (MENA without Iran)	32	28.52	26.51	22.45	24.42	24.59	23.23	20.8	20.37

Source: Chen and Ravallion 2007.

Note: The Arab countries aggregate includes the following countries: Algeria, Djibouti, Egypt, Jordan, Morocco, Tunisia and Yemen.

Table 5-5 The incidence of (extreme) poverty based on national lower poverty lines (1991-1999 and 1999-2006)

Country	Survey year	Poverty incidence (%)	Pop. average (1995-2000) in millions	Estimated number of poor (millions)	Survey year	Poverty incidence (%)	Pop. average (2000-2005) in millions	Estimated number of poor (millions)
Lebanon	1997	10	3.6	0.4	2005	7.97	3.9	0.3
Egypt	1999	16.7	63.6	10.6	2005	19.6	69.7	13.7
Jordan	1997	15	4.6	0.7	2002	14.2	5.2	0.7
Syria	1997	14.3	15.6	2.2	2004	11.4	17.7	2.1
Algeria	1995	14.1	29.4	4.1	2000	12.1	31.7	3.8
Morocco	1991	13.1	27.9	3.7	1999	19	29.7	5.6
Tunisia	1995	8.1	9.3	0.8	2000	4.1	9.8	0.4
MICs		14.6	153.9	22.4		15.9	167.6	26.6
Mauritania	1996	50	2.4	1.2	2000	46	2.8	1.3
Yemen	1998	40.1	16.9	6.8	2006	34.8	19.6	6.8
LICs		41.4	19.2	8		36.2	22.4	8.1
Total		17.6	173.1	30.4		18.3	190	34.7

Source: UNDP/AHDR calculations based on World Bank 2007, 2008; UNDP 2005, 2007, 2008. (See Statistical references).

Source: Arab Development Report, 2009, p. 113.

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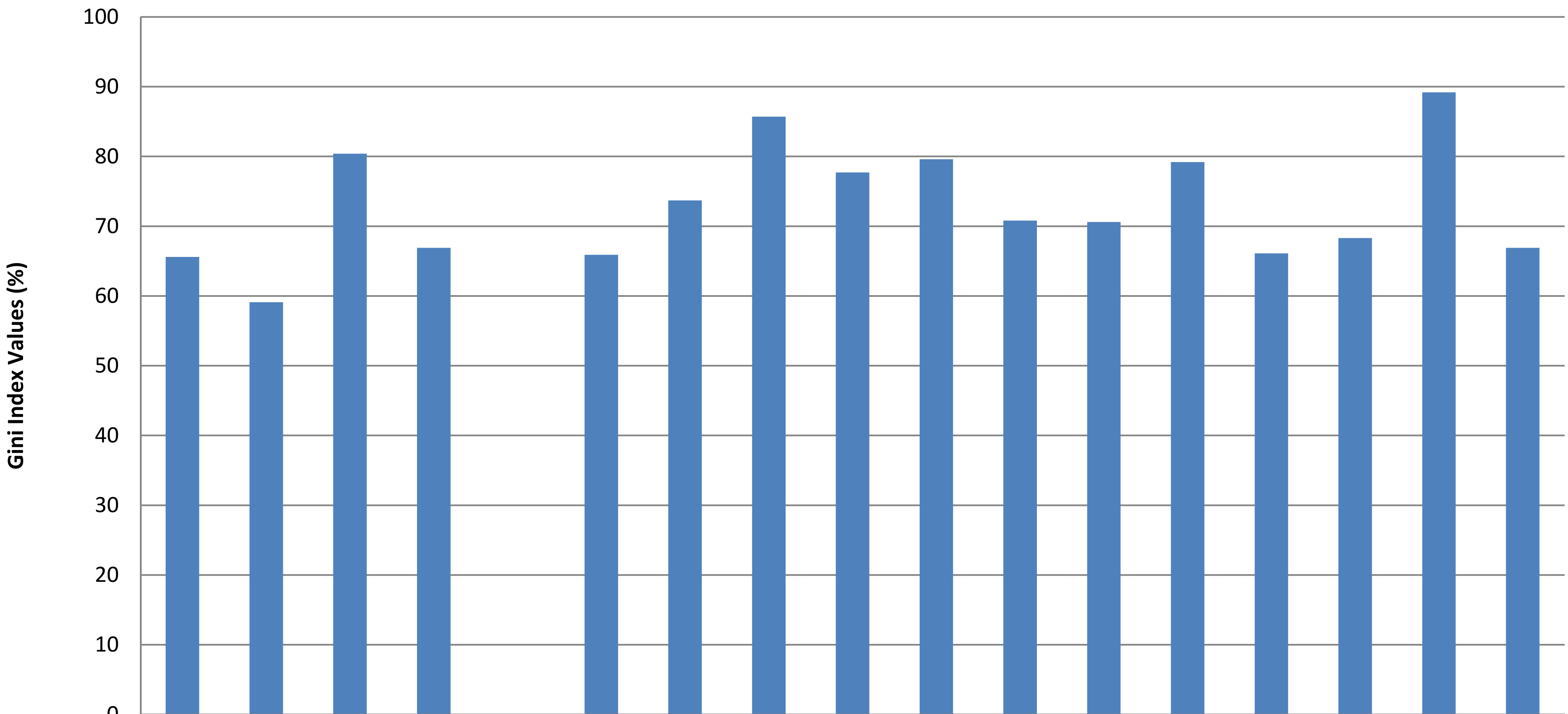
Gini Index



	Algeria	Bahrain	Egypt	Iran	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudia Arabia	Syria	Tunisia	UAE	Yemen
Gini Index	65.6	59.1	80.4	66.9	0	65.9	73.7	85.7	77.7	79.6	70.8	70.6	79.2	66.1	68.3	89.2	66.9

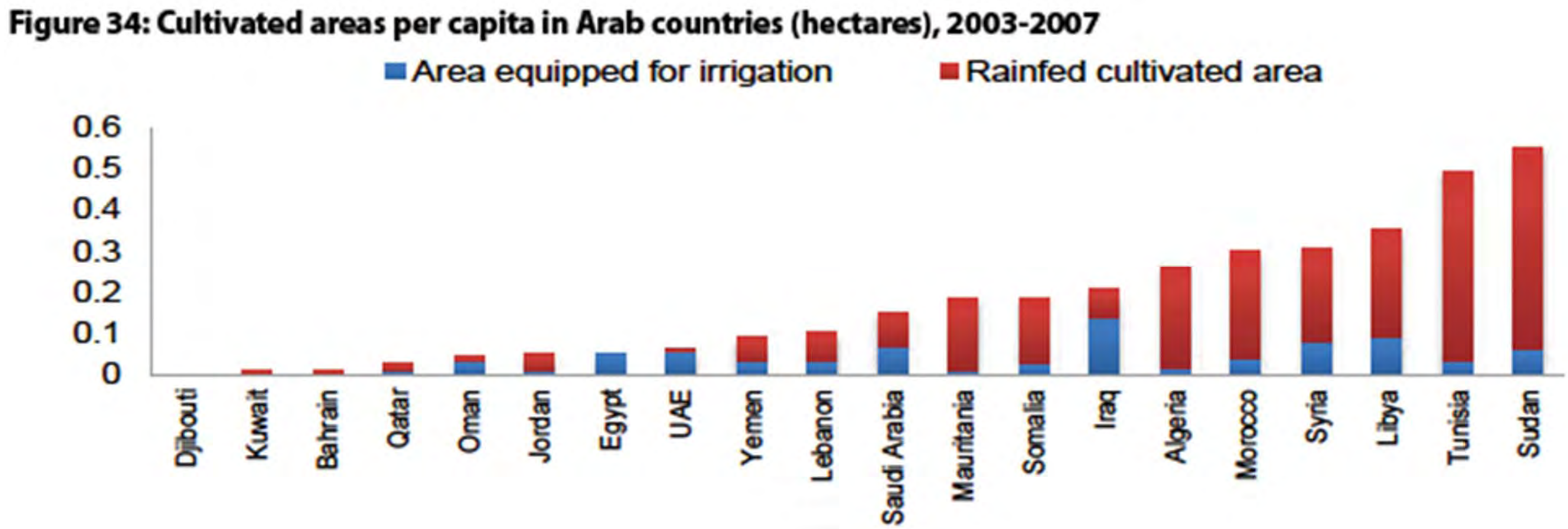
The GINI Index is a measure of statistical dispersion developed by the Italian statistician and sociologist Corrado Gini that measures the inequality among levels of income. The index is measured between 0% and 100%. 0% indicates a society in which all individuals have the same income, 100% indicates that all national wealth is concentrated into one individual

Credit Suisse, Credit Suisse Research Institute, *Global Wealth Databook 2012*. p. 93-96. Accessed August 8, 2013
https://publications.credit-suisse.com/tasks/render/file/index.cfm?fileid=88EE9D2B-83E8-EB92-9D5E0AB7A9A266A9

Like Poverty, Food Supply and Costs Are a Serious Issue and Key Cause of Instability

Some estimates indicate the the region has an exceptionally high spending on food as a percent of total income

The "Food Gap" in Arab States: Cultivated Areas Per Capita

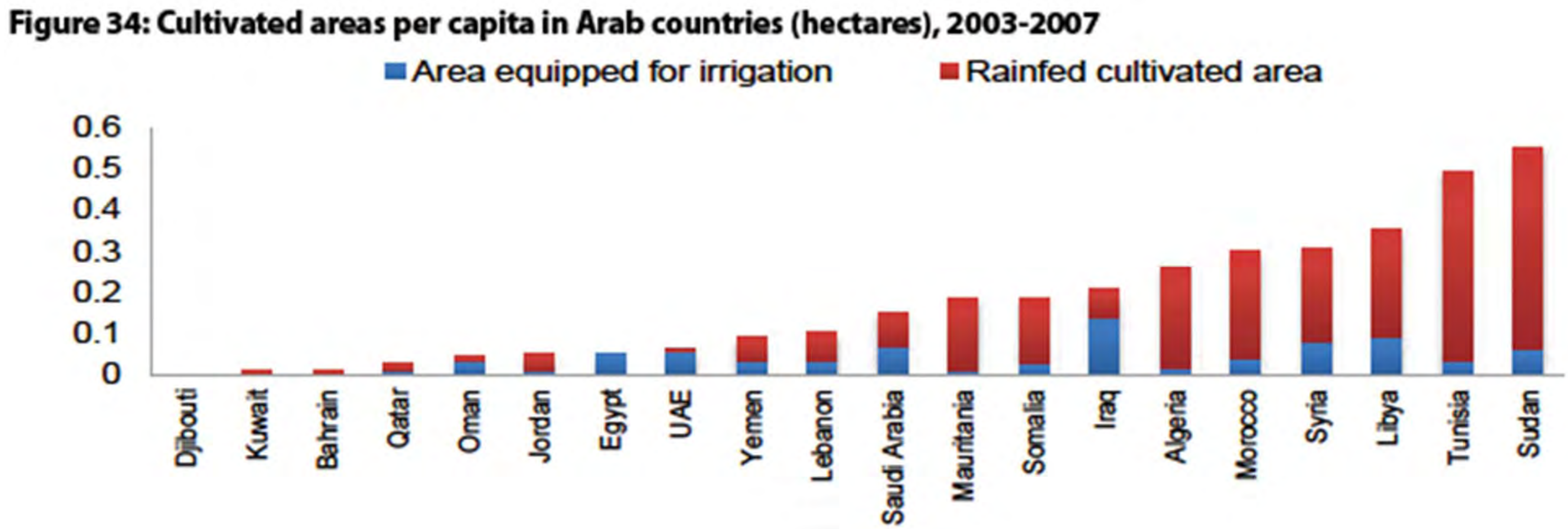


Falling mostly within the arid and semi-arid rainfall zones and with limited agricultural potential resources, most Arab countries have attempted to increase their agricultural production with improvement in productivity, intensive farming, extensive use of water resources for irrigation, and expansion of cultivated areas including the fragile rain-fed soils at the expenses of rangeland areas. While this extensive use of land and water has accentuated the fragility of the natural resource base, increase of the cultivated areas has been modest. Moreover, demographic growth, combined with urban expansion, has led to a dramatic decrease in per capita land and water availability in all countries of the region.

…In the agricultural sector where the majority of the poor reside, irrigation water subsidies have been justified on the grounds that they provide aid to the poor. However, newly accumulated data reveals that the poor in the agrarian sector, like their counterparts in urban centers, do not necessarily benefit from such policies. In Egypt, 75% of water subsidies benefits the richest 50% of households, whereas only 25% benefits the poorest 50%. These findings indicate that irrigation subsidies are not justified as a policy instrument for the redistribution of income. The main beneficiaries of subsidies are the rich, not the poor.

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, p. 53.

The "Water Gap" in Arab States: Renewable Water Per Capita



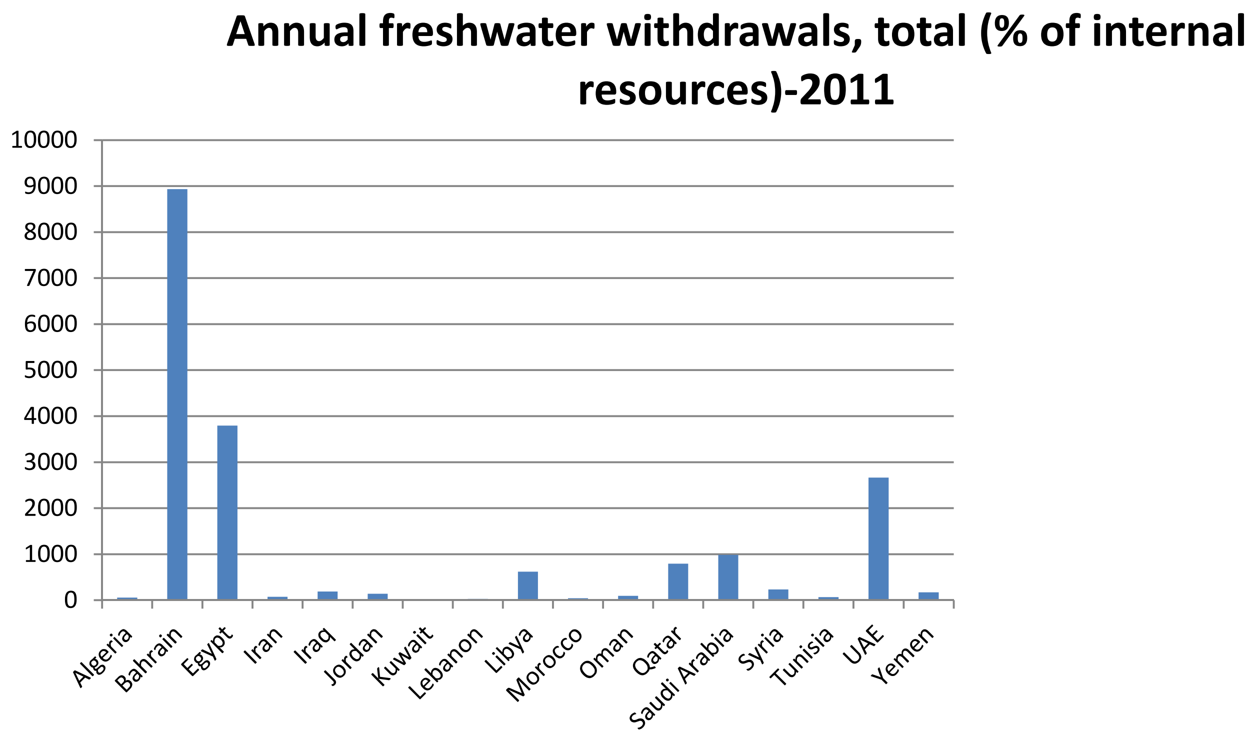
More than arable land, …scarcity of water constitutes the most important constraint to agricultural production and food security in the region. Population increase conjugated with overexploitation of water resources, especially groundwater, has resulted in a sharp drop of available water. At the regional level, total renewable water per capita decreased from 3035 m3 in 1958-1962 to 973 m3 in 2003-2007. This low level makes the Arab region the most water scarce in the world (world average is about 7,000 m3 per capita).

While Morocco and Egypt are below the scarcity level of 1,000 cubic meters per person per year, 12 other countries, including Tunisia and Algeria, are in a state of "water crisis" (less than 500). Of these countries, 8 are in a state of "absolute scarcity' with less than 165 cubic meters per capita (including Jordan, Libya, Yemen and the high income countries of the GCC).Thus, only 3 countries in the region (Iraq, Sudan and Somalia) can be considered as having a sufficient level of water to meet their needs (more than 1,700 cubic meters per person).

Water per capita is about 100 cubic meters per year in Yemen, which is less than 10% of the average for Arab countries and less than 2% of the world average. With no significant perennial sources of surface water, Yemen relies almost exclusively on over-exploitation of groundwater. Water from the shallow aquifers is extracted at a rate that exceeds the recharge from the limited rainfall. The rate of depletion has accelerated over the last three decades due to the introduction of tube-well technology and pump-sets. According to the World Bank Assessment, groundwater is being mined at such a rate that large parts of the rural economy could disappear within a generation.

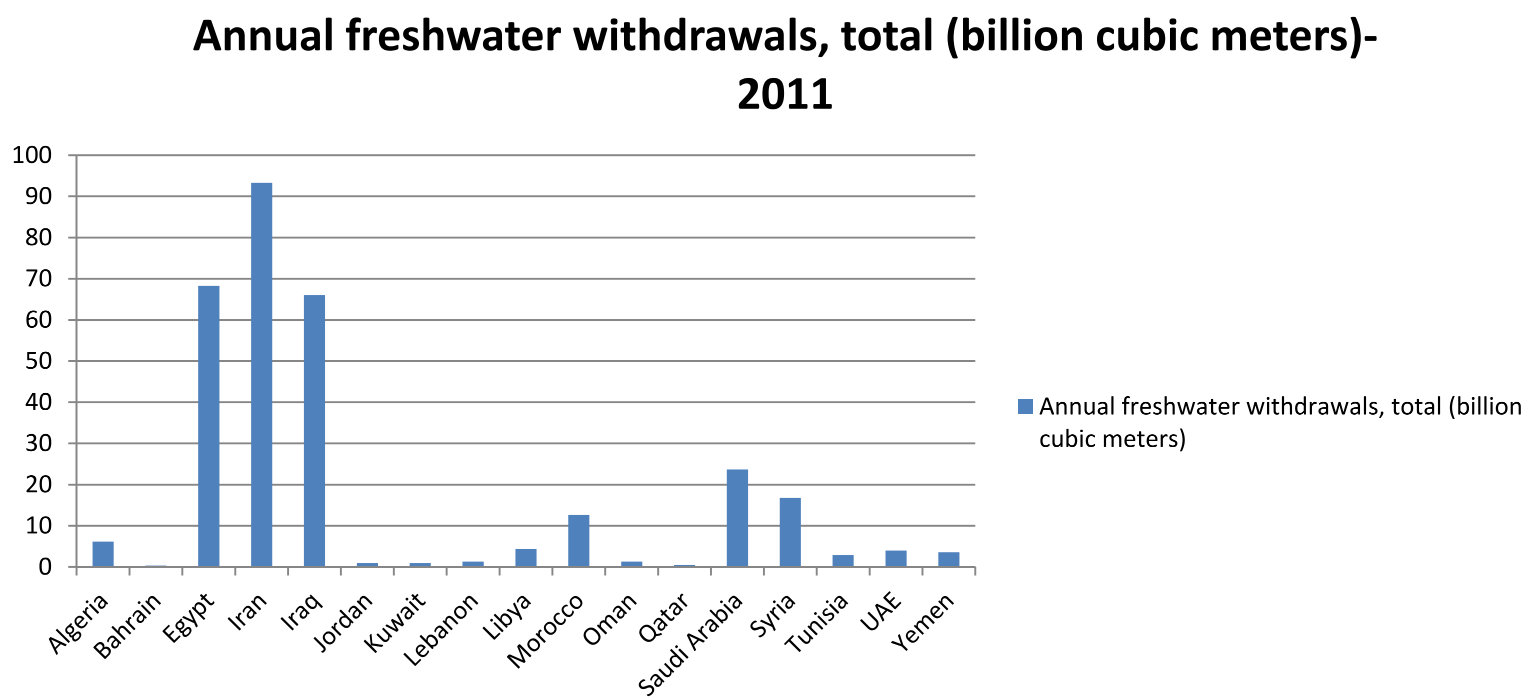
UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, p. 53.

The "Water Gap" in Arab States: Annual Fresh Water Use-I



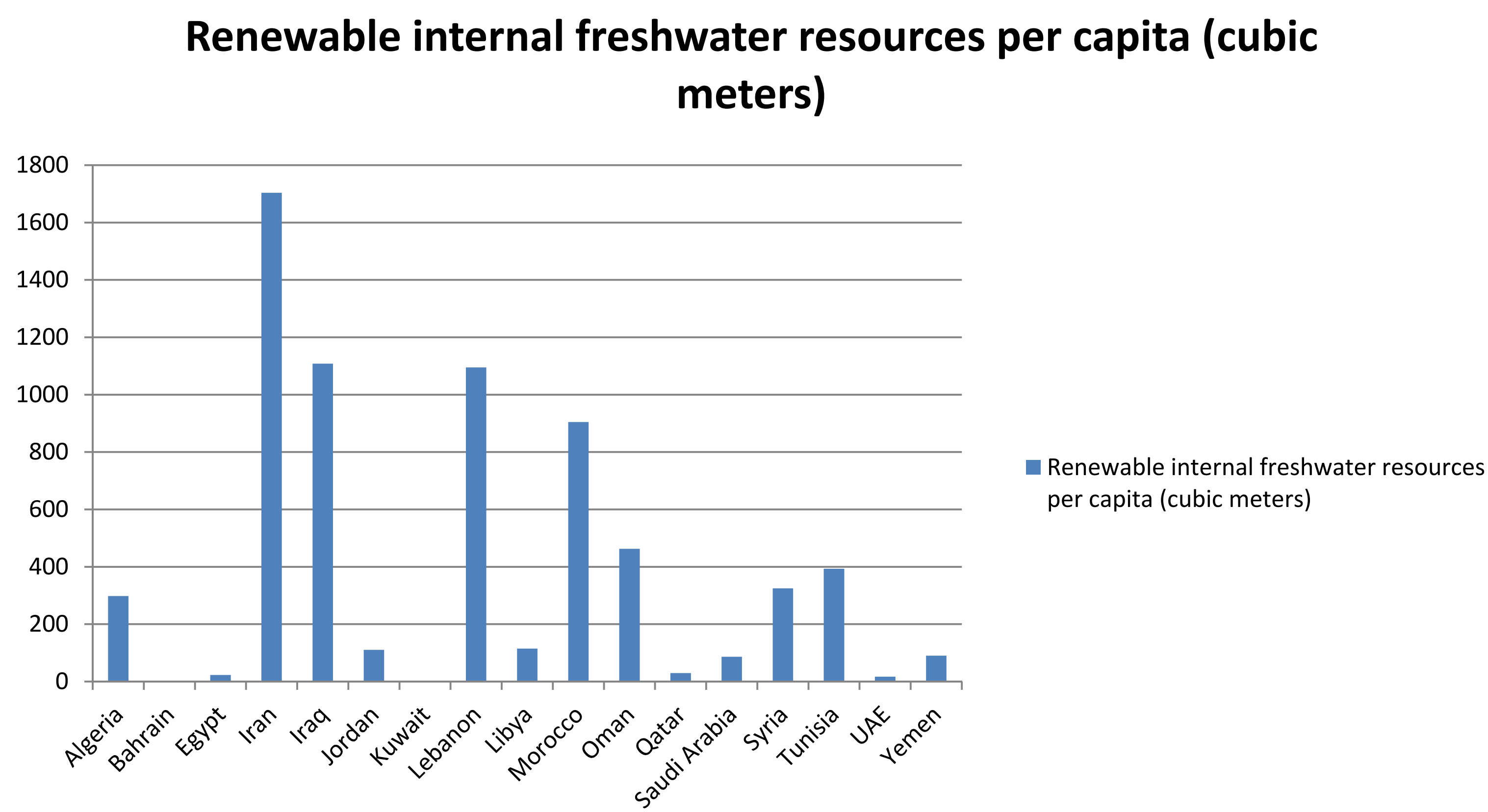
The World Bank, dataBank, Accessed August 12, 2013. http://databank.worldbank.org/ddp/home.do?Step=3&id=4

The “Water Gap” in Arab States: Annual Fresh Water Use-II

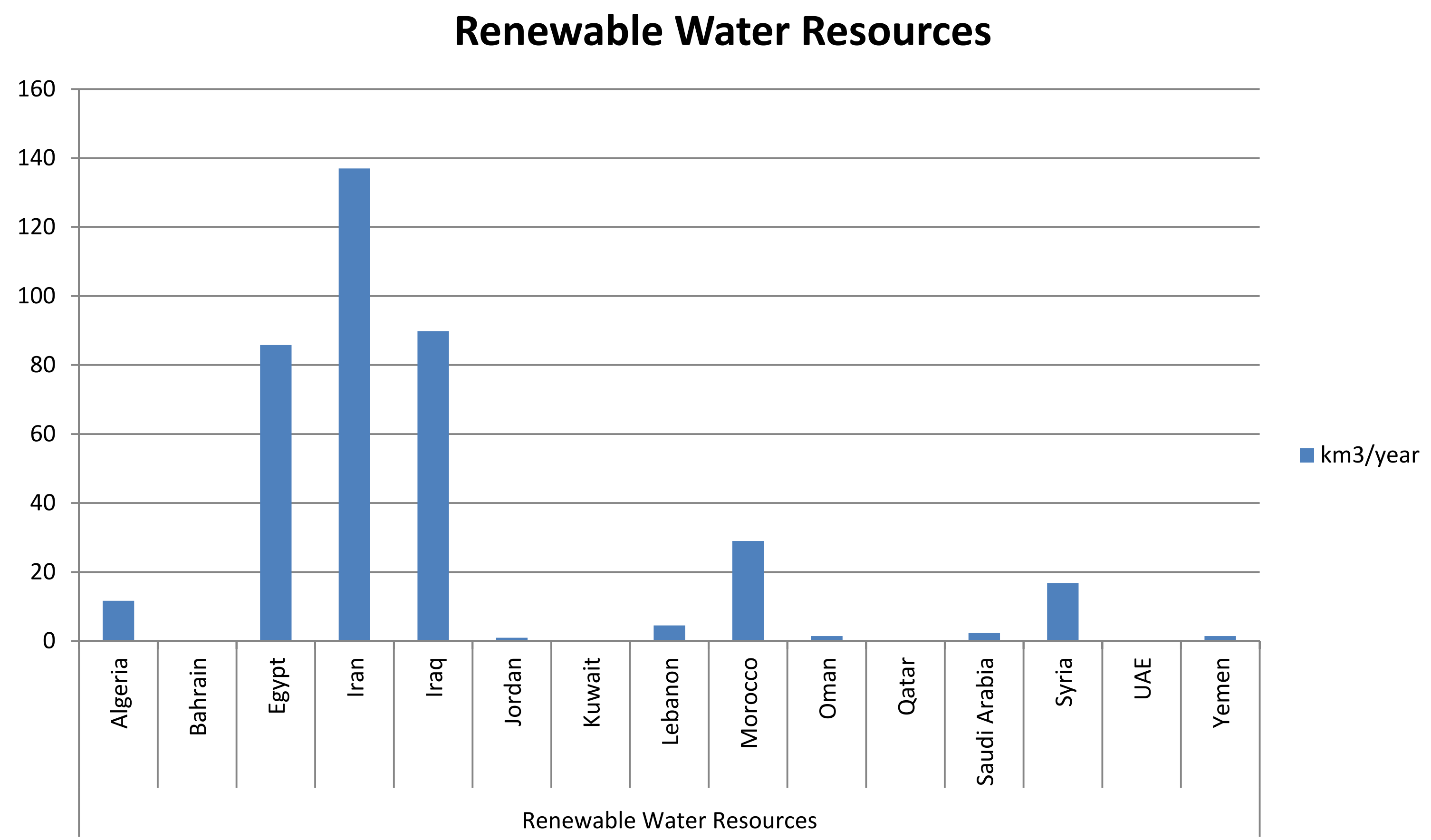


The World Bank, dataBank, Accessed August 12, 2013. http://databank.worldbank.org/ddp/home.do?Step=3&id=4

The “Water Gap” in Arab States: Renewable Internal Freshwater Per Capita



The World Bank, dataBank, Accessed August 12, 2013. http://databank.worldbank.org/ddp/home.do?Step=3&id=4



Food and Agriculture Organization of the United Nations, "Computation of long-term annual renewable water resources by country," Last Updated August 1st 2013. Data drawn from individual country reports, i.e. http://www.fao.org/nr/water/aquastat/data/wrs/readPdf.html?f=WRS_YEM_en.pdf. Accessed August 13, 2013.

Undernourished by MENA Country

World Region/Subregion/country	Number of people undernourished							Proportion of undernourished in total population						
	1990–1992	1999–2001	2004–2006	2007–2009	2010–2012	Change so far	Progress towards WFS target [a]	1990–1992	1999–2001	2004–2006	2007–2009	2010–2012	Change so far	Progress towards MDG target [a]
	(millions)					(%)		(%)					(%)	
Western Asia	**8**	**13**	**16**	**18**	**21**	**146.6**	▲	**6.6**	**8.0**	**8.8**	**9.4**	**10.1**	**53.0**	
Iraq	2	5	6	8	9	334.9	▲	10.9	19.0	23.1	25.9	26.0	138.5	
Jordan	< 0.5	< 0.5	ns	ns	ns	na	na	6.7	6.1	< 5	< 5	< 5	na	
Kuwait	1	ns	ns	ns	ns	na	na	28.7	1.5	0.9	1.1	1.7	na	
Lebanon	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	
Saudi Arabia	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	
Syrian Arab Republic	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	
Turkey	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	
United Arab Emirates	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	
Yemen	4	5	7	7	8	124.3	▲	28.6	30.4	31.7	30.6	32.4	13.3	
AFRICA	**175**	**205**	**210**	**220**	**239**	**36.8**	▲	**27.3**	**25.3**	**23.1**	**22.6**	**22.9**	**–16.1**	
Northern Africa	**5**	**5**	**5**	**4**	**4**	**–2.5**	◀▶	**3.8**	**3.3**	**3.1**	**2.7**	**2.7**	**–28.9**	
Algeria	1	2	ns	ns	ns	na	na	5.2	5.8	< 5	< 5	< 5	na	
Egypt	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	
Libya	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	
Morocco	2	2	2	2	2	–1.5	◀▶	7.1	6.2	5.2	5.2	5.5	–22.5	
Tunisia	ns	ns	ns	ns	ns	na	na	< 5	< 5	< 5	< 5	< 5	na	

UN WFP/FAO, *The State of Food Insecurity in the World*, Last updated January 2013. http://www.fao.org/docrep/016/i3027e/i3027e06.pdf

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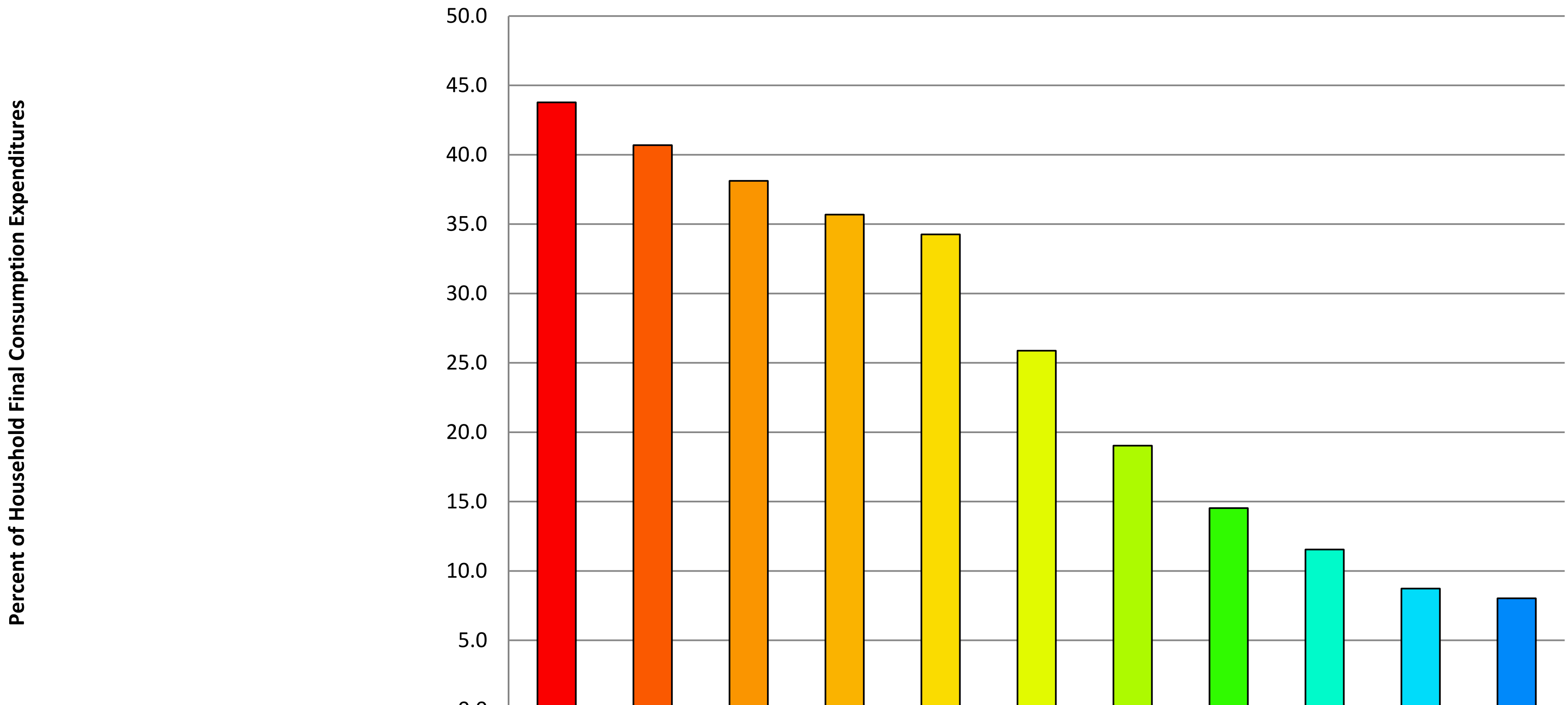
Percent of Household Final Consumption: Expenditures Spent on Food Consumed at Home, 2009



	Algeria	Jordan	Egypt	Tunisia	Qatar	Iran	Kuwait	Bahrain	Morocco	United Arab Emirates	Saudi Arabia
Percent of Household Final Consumption Expenditures Spent on Food Consumed at Home: 2009	43.8	40.7	38.1	35.7	34.3	25.9	19.0	14.5	11.5	8.7	8.0

Source: U.S. Department of Agriculture, Economic Research Service; "Food, CPI, Prices and Expenditures: Expenditure Tables," July 2011. http://www.census.gov/compendia/statab/cats/international_statistics.html

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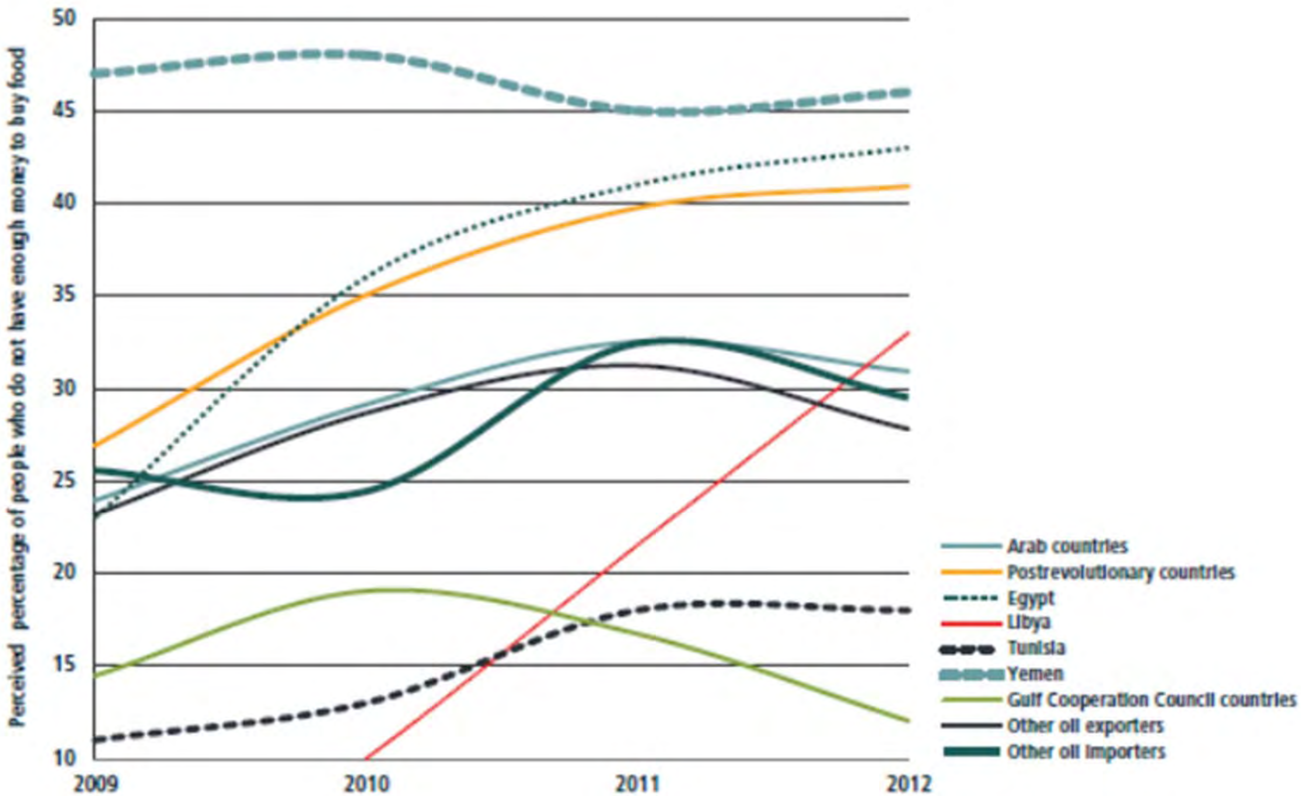
Perception of Food Insecurity in Arab Countries 2009-2012



Source: Authors' representation based on data from Gallup World Poll, "WorldView," https://worldview.gallup.com/signin/login.aspx, accessed January 11, 2013.

Notes: Postrevolutionary countries include Egypt, Libya, Tunisia, and Yemen. Gulf Cooperation Council countries include Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. Other oil-exporting countries include Algeria, Iraq, and Sudan. Other oil-importing countries are Comoros, Djibouti, Jordan, Lebanon, Mauritania, Morocco, Somaliland (a region within Somalia), Syria, and West Bank and Gaza. Data for groups of countries are weighted by country population size. No estimates are available for Libya for 2009 and 2011. Estimate for Morocco is for 2008, not 2009.

Clemens Breisinger, "Beyond the Arab Awakening: From revolution to food security and development," presented at the University of Hohenheim-Food Security Seminar Series, April 18, 2013. Accessed August 13, 2013.
https://fsc.unihohenheim.de/fileadmin/einrichtungen/fsc/FSC_in_Dialog/previous_FSC_in_dialog/2013/Breisinger_Food_Security_Seminar.pdf

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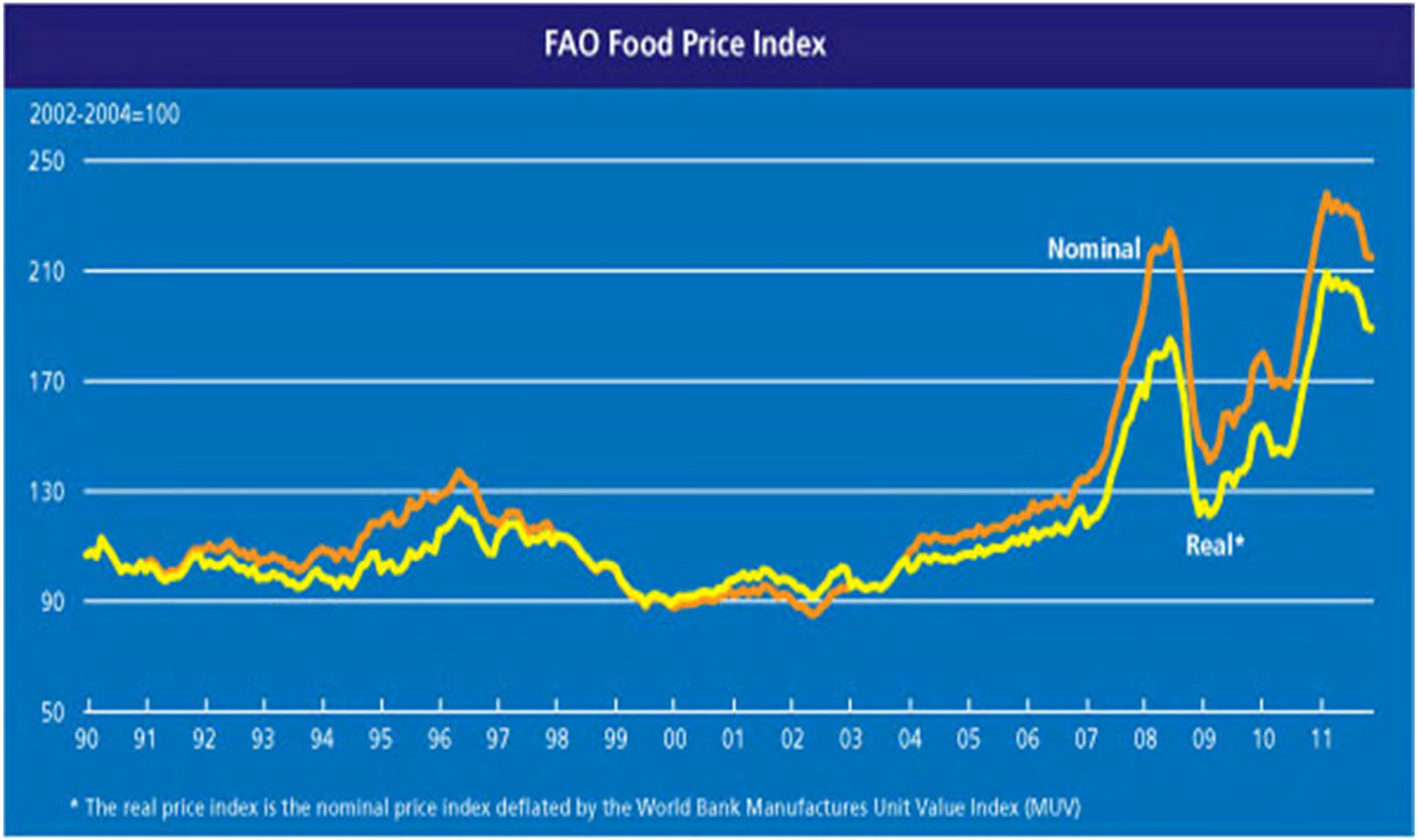
Peaks in Food Prices



Source: Food and Agriculture Organization of the United Nations, Food Price Index, Accessed January 2011.
http://www.fao.org/worldfoodsituation/wfs-home/foodpricesindex/en/

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Soaring Food Prices and Poverty: Egypt as a Case Study-I

As rising global food prices continue to threaten to push millions of people into extreme poverty, Egypt grapples with an insurmountable budget burden against the threat of further unrest and bread riots, lest it discontinue the food and fuel subsidies on which the livelihoods of so many Egyptians depend. As one of the largest importers of food, namely the largest importer of wheat in the world, Egypt is among the countries with the highest level of spending on food subsidies. Thus, in the context of the 'silent tsunami' of the 2008 crisis, preceded by the devaluation of the Egyptian currency, staggering inflation rates, with Egypt recording one of the highest increases in food prices in the world, the rising importance of food subsidies became inevitable. During this time, the purchasing power of poor households decreased by 10% (in 2007); an extreme poverty rate which stood at 16.7 in 2000 reached 19.6% by 2004/5 and 21.6% by 2008/9.

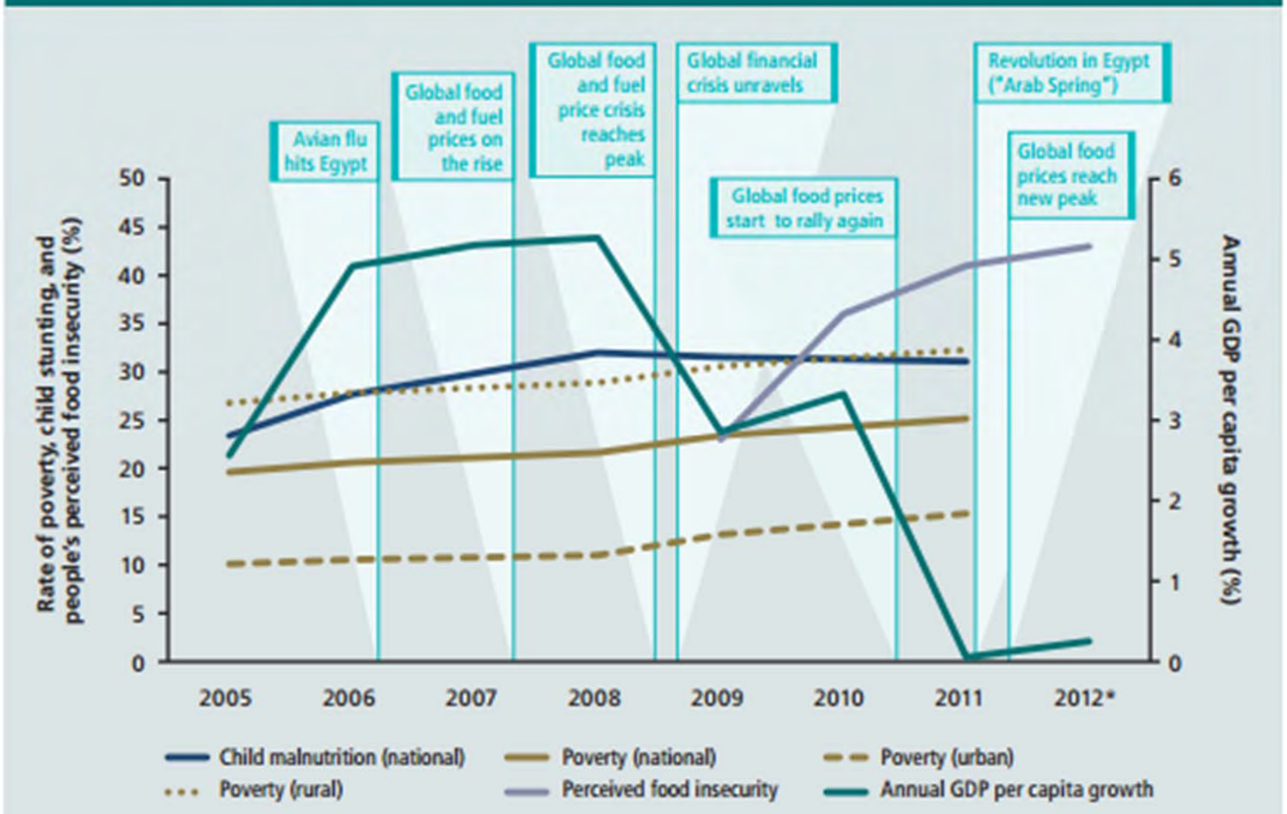
The increase in consumer food prices in Egypt was far from a simple transmission of international food prices. Paradoxically, the prices of local products experienced even a greater increase than imported products. The highest increases were recorded for dairy products (82%), fruits (139%) and vegetables (102%), the three food groups in which Egypt is actually self-sufficient. This had large negative ramifications on the composition and quality of the Egyptians' diet. The poor who were disproportionately affected by this price rise, shifted their consumption increasingly towards cereals such as subsidized bread.

As a result, Egyptians have witnessed a remarkable increase in their dietary caloric intake over the recent years, but the nutritional value has decreased markedly as the composition of this energy supply has been overwhelmingly dominated by cereals, making up 60 percent of the Daily Energy Supply (DES) in Egypt (according to HIES data). As subsidized foods consist mainly of energy-dense and micronutrient poor commodities (sugar, oil, bread), micronutrient deficiency, in other words hidden hunger, still remains a serious problem. The prevalence of obesity in adults has become very high, especially amongst women. In addition, according to WHO, one in every two children under the age of five suffers from some degree of anemia and the share of stunted children, an indication of chronic malnutrition, is increasing at an alarming rate.

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, p. 56.

Soaring Food Prices and Poverty: Egypt as a Case Study-II

FIGURE 1 Overview of key food security and development indicators in Egypt, 2005–2012



Source: Authors' representation based on Demographic and Health Surveys; Household Income, Expenditure and Consumption Survey; Gallup World View data; Ministry of Finance, *Financial Monthly* (January 2013), www.mof.gov.eg/MOFGallerySource/English/Reports/monthly/2013/Jan2013/a-b.pdf; and Economist Intelligence Unit, *Country Report: Egypt* (January 2013). *Projected for annual GDP per capita growth.

International Food Policy Research Institute, "Tackling Egypt's Rising Food Insecurity in a Time of Transition," World Food Program, May 2013. http://www.ifpri.org/sites/default/files/publications/ifpriwfppn_egypt.pdf Accessed August 13, 2013

The "Energy Curse"

Economics, Demographics, Subsidies, Poor Governance, and State Barriers to Effective Investment and Resource Development Form a Threat to Energy Export Income and MENA Stability

A Broader View of the MENA "Energy Curse"

- **Classic Problems are:**
  - **State drive by export revenues, not broad social and economic needs.**
  - **Gross distortion of development coupled to finite life of resource**
  - **Rentier creation of disguised unemployment coupled to major population increases**
- **2011 Arab Development Report adds:**
  - **Massive waste through subsidies coupled to steadily growing loss of export capability.**
  - **Major opportunity cost coupled to loss of incentive for efficiency, global competitiveness.**
  - **Compounds job creation problems, disguised unemployment.**
  - **Energy subsidies come as cost of education, health and development.**
  - **Massive increase in pollution**.

Arab Development Challenges Report: Growth and Structural Transformation

Volatile and oil-led growth perpetuate structural retardation

Average annual real GDP per capita growth rates during 1970-2009 reached 2% per annum for the Arab region, with the overall pattern of growth in the region dependent on oil and its price.

Structural economic problems in the Arab world include:

- **Stagnating agricultural and manufacturing sectors**
- **A rapidly expanding services sector (mainly low value-added activities) at the expense of more productive sectors—Arab states are the least industrialized among developing regions**
- **An overwhelming dependence on the oil sector, which exposes Arab economies to volatile oil markets**

Creation of highly productive jobs has also been hindered by the above structural problems:

- **Mining has a high share of output, but a low share of employment**
- **Low value added services have become the main employers of labor and contributors to output**

Production and exports are concentrated in low value-added goods and services

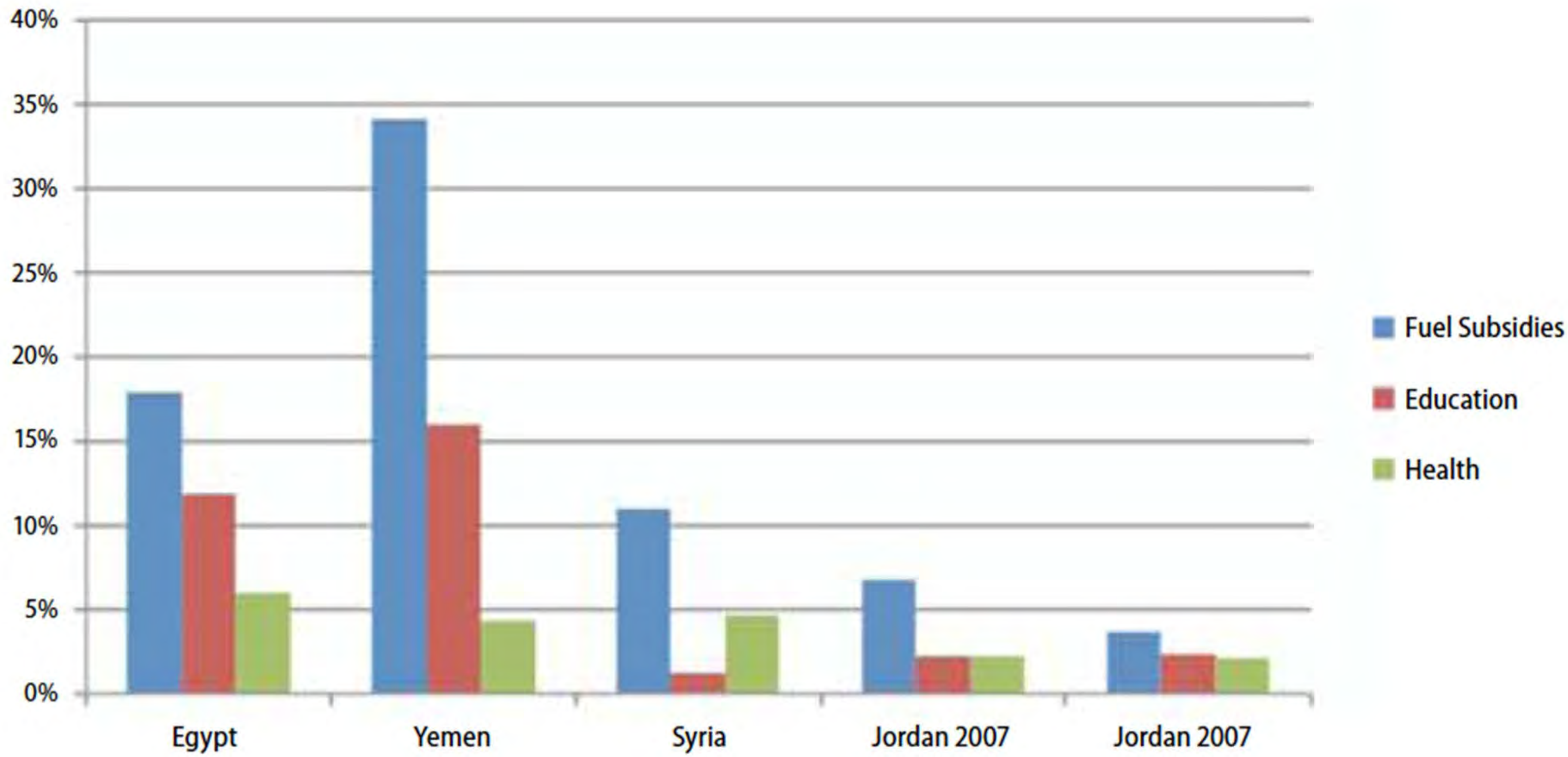
The region has failed to develop its trading capabilities within the global market:

- **Exports are still simple, primary products**
- **Imports, on the other hand, are very diversified**

The region is the least industrialized among developing regions, due to a weak manufacturing sector that produces low value-added petroleum and food-derived products and a services sector that is similarly engaged in low value output rather than higher value more specialized services such as communications or finance.

Source: UNDP (2011) "Arab Development Challenges Report: Towards the Developmental State in The Arab Region", P.17-60, United Nations Development Programme, Regional Center for Arab States, Cairo; Azar, NBK, May 2012.

MENA Self-Inflicted Energy Wounds: Energy Subsidies vs. the Public Interest

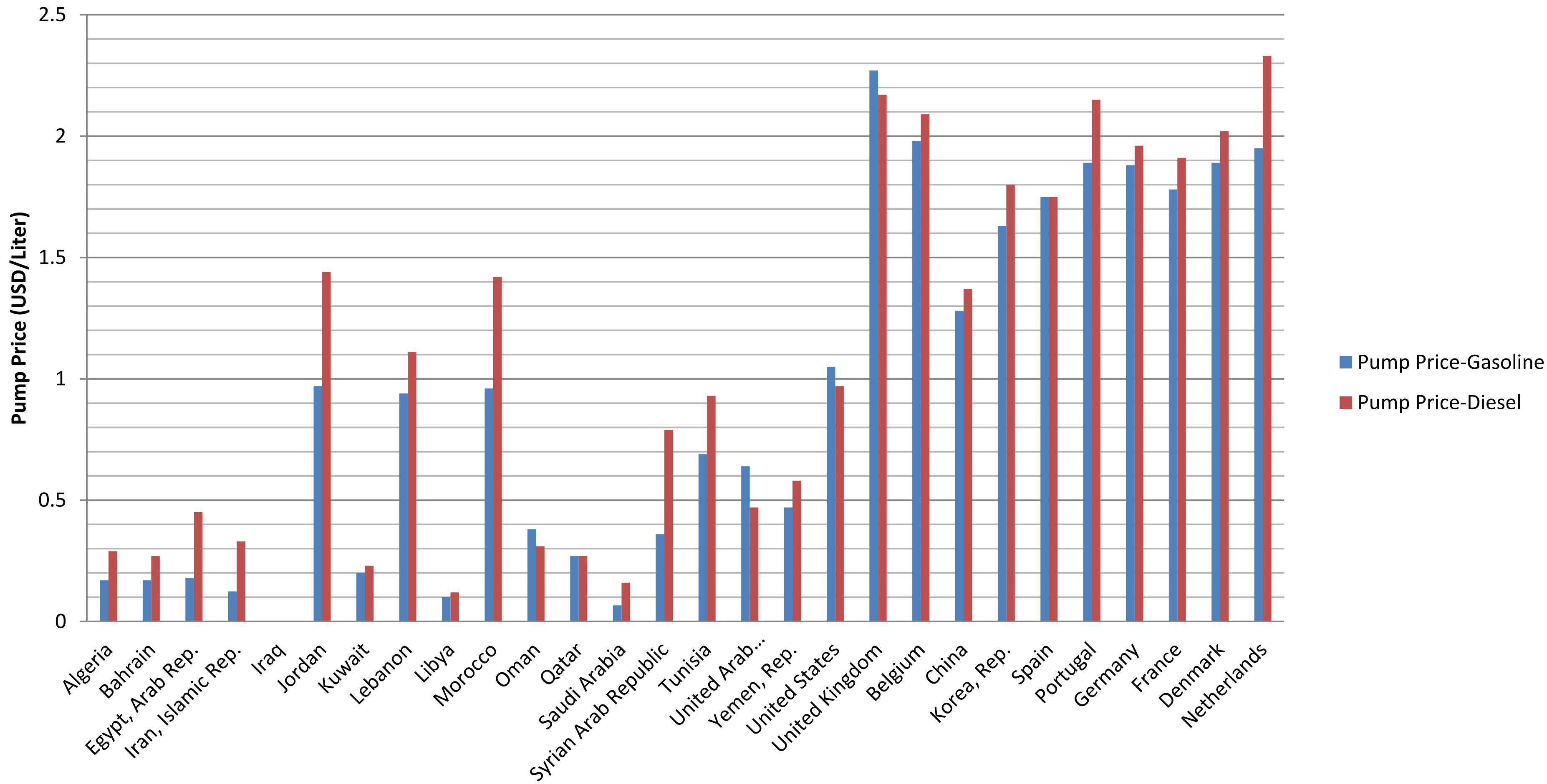


Source: Egypt: World Bank (2011); Yemen: Breisinger et al (2011), Authors' own calculations; Syria: IMF (2010a), MEES, World Bank (2011); Jordan: IMF (2010b), World Bank (2011).

Source: Bassam Fattouh & Laura El-Katiri, *Energy Subsidies in the Arab World*, Arab Development Report, UNDP, 2012, p. 49

MENA Self-Inflicted Energy Wounds: Gas and Diesel Prices

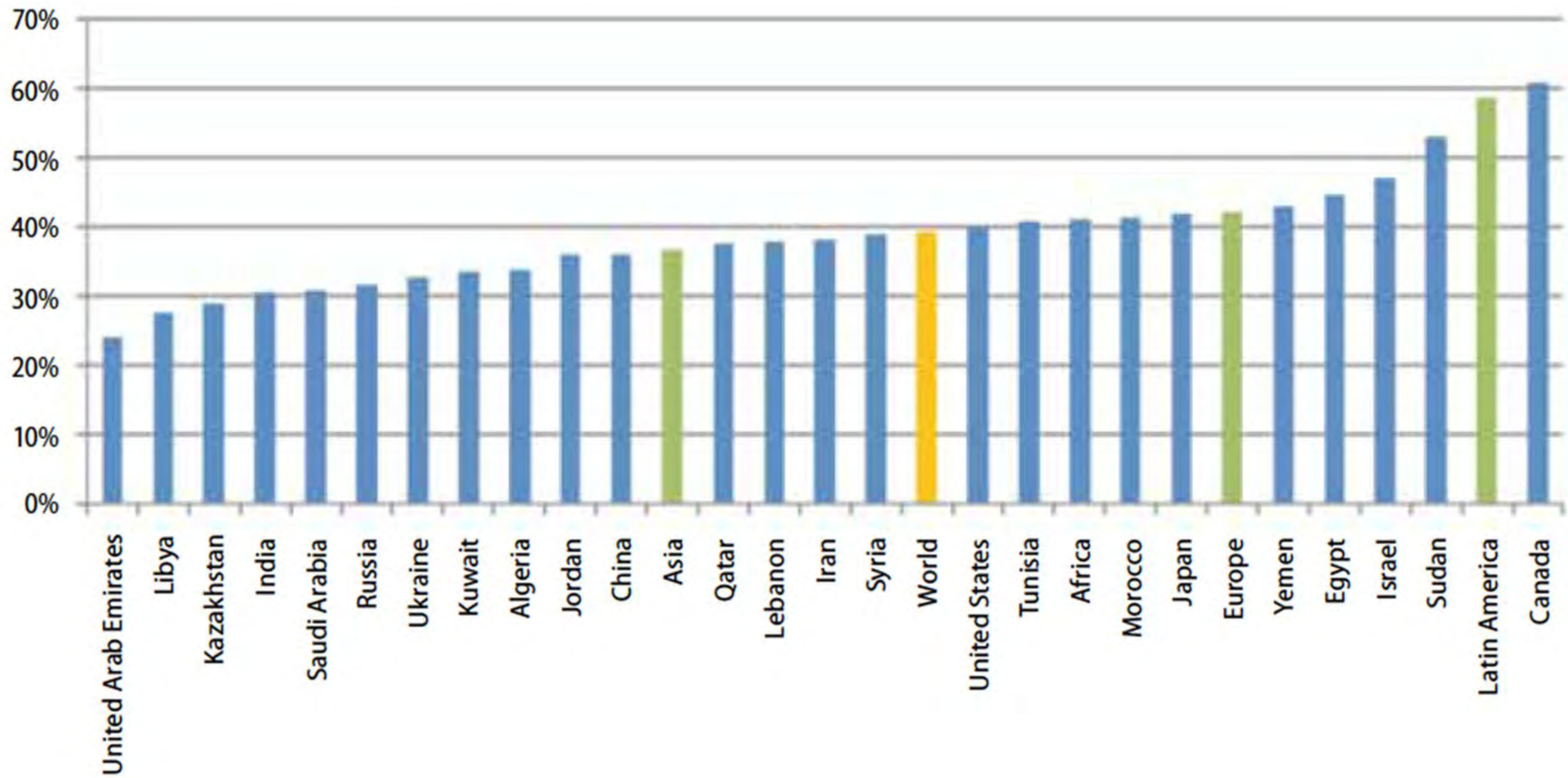
Average Retail Prices for Gasoline and Diesel in Selected Arab, OECD, and Non-OECD Countries-2012



The World Bank, dataBank, Accessed August 12, 2013. http://databank.worldbank.org/ddp/home.do?Step=3&id=4

MENA Self-Inflicted Energy Wounds: Efficiency in Power Generation

FIGURE 5: ENERGY EFFICIENCY IN POWER GENERATION IN SELECTED ARAB, OECD, AND NON-OECD COUNTRIES (%), 2009



Source: ABB, Trends in Global Energy Efficiency 2011

Source: Bassam Fattouh & Laura El-Katiri, *Energy Subsidies in the Arab World*, Arab Development Report, UNDP, 2012, p. 26

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Ethnic, Sectarian, and Tribal Differences: "Clash Within A Civilization"

Not a "clash between civilizations," but a struggle within the Arab and Islamic worlds

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Ethnic, Sectarian, Tribal, and Regional Differences

- No real census efforts, Deal with key divisions through denial or dishonest, politicized estimates
- Deep and growing divisions at sectarian extremes, Sunni and Shi’ite.
- Tribal, sectarian, ethnic, and linguistic differences tend to cluster, and reflect government favoritism and wealth/income differences.
- Over-reliance on foreign labors often a critical problem. Denies jobs to native population that needs them, eliminates growth of a work ethic asnd meaningful social role for others.
- Mixed record in both correcting historical problems and offering clear path of hope for the future.
- Tensions made worse by resource and demographic pressures.
- Violent extremism feeds on these differences.

Key Ethnic and Sectarian Differences by Country: North Africa

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Algeria

Ethnicity: Arab-Berber 99%, European less than 1% (*note:* almost all Algerians are Berber in origin, not Arab; the minority who identify themselves as Berber live mostly in the mountainous region of Kabylie east of Algiers; the Berbers are also Muslim but identify with their Berber rather than Arab cultural heritage; Berbers have long agitated, sometimes violently, for autonomy; the government is unlikely to grant autonomy but has offered to begin sponsoring teaching Berber language in schools)

Religion: Sunni Muslim (state religion) 99%, Christian and Jewish 1%

Language: Arabic (official), French, Berber dialects

Libya

Ethnicity: Berber and Arab 97%, other 3% (includes Greeks, Maltese, Italians, Egyptians, Pakistanis, Turks, Indians, and Tunisians)

Religion: Sunni Muslim 97%, other 3%

Language: Arabic, Italian, English, all are widely understood in the major cities.

Morocco

Ethnicity: Arab-Berber 99.1%, other 1%

Religion: Muslim 98.7%, Christian 1.1%, Jewish 0.2% (about 600,000)

Language: Hassaniya Arabic, Moroccan Arabic, Berber dialects, French often the language of business, government, and diplomacy.

Tunisia

Ethnicity: Arab 98%, European 1%, Jewish and other 1%.

Religion: Muslim 98%, Christian 1%, Jewish and other 1%.

Language : Arabic (official and one of the languages of commerce), French (commerce).

CIA World Factbook, accessed August 16, 2013

Key Ethnic and Sectarian Differences by Country: Egypt & Levant - I

Egypt

Ethnicity 99.6%, other 0.4% (2006 census)

Religion: Muslim (mostly Sunni) 90%, Coptic 9%, other Christian 1%

Language: Arabic (official), English and French widely understood by educated classes

Israel

Ethnicity: Jewish 76.4% (of which Israel-born 67.1%, Europe/America-born 22.6%, Africa-born 5.9%, Asia-born 4.2%), non-Jewish 23.6% (mostly Arab.) Approximately 325,500 Israeli settlers live in the West Bank (2011 est.); approximately 18,700 Israeli settlers live in the Golan Heights (2011 est.); approximately 186,929 Israeli settlers live in East Jerusalem (2010) IDPs: 150,000-420,000 (Arab villagers displaced from homes in northern Israel) (2007)

Religion: Jewish 75.5%, Muslim 16.8%, Christian 2.1%, Druze 1.7%, other 3.9% (2008)

Language: Hebrew (official), Arabic (used officially for Arab minority), English (most commonly used foreign language).

Gaza Strip

Ethnicity: Palestinian Arab: 1,763,387 (July 2013 est.)

Religion: Muslim (predominantly Sunni) 99.3%, Christian 0.7%

Language: Arabic, Hebrew (spoken by many Palestinians), English (widely understood).

West Bank

Ethnicity: 2,676,740 (July 2013 est.) Palestinian Arab and other 83%, Jewish 17%.

Religion: Muslim 75% (predominantly Sunni), Jewish 17%, Christian and other 8%.

Language : Arabic, Hebrew (spoken by Israeli settlers and many Palestinians), English (widely understood).

CIA World Factbook, accessed August 16, 2013

Key Ethnic and Sectarian Differences by Country: Egypt & Levant - II

Jordan

Ethnicity: Arab 98%, Circassian 1%, Armenian 1%. Note: Jordan has been the recipient of refugees from countries around the MENA region: 1,979,580 Palestinian refugees (UNRWA-2011); 63,037 Iraqi refugees (2012); 515,068 Syrian refugees (2013).

Religion: Muslim (mostly Sunni) 90%, Coptic 9%, other Christian 1%

Language: Arabic (official), English (widely understood among upper and middle classes)

Lebanon

Ethnicity: Arab 95%, Armenian 4%, other 1% *note:* many Christian Lebanese do not identify themselves as Arab but rather as descendants of the ancient Canaanites

Religion: Muslim 59.7% (Shia, Sunni, Druze, Isma'ilite, Alawite or Nusayri), Christian 39% (Maronite Catholic, Greek Orthodox, Melkite Catholic, Armenian Orthodox, Syrian Catholic, Armenian Catholic, Syrian Orthodox, Roman Catholic, Chaldean, Assyrian, Copt, Protestant), other 1.3%. *note:* 17 religious sects recognized

Language: Arabic (official), French, English, Armenian.

Syria

Ethnicity: Arab 90.3%, Kurds, Armenians, and other 9.7%. *note:* approximately 18,700 Israeli settlers live in the Golan Heights (July 2011 est.)

Religion: Sunni Muslim (Islam - official) 74%, other Muslim (includes Alawite, Druze) 16%, Christian (various denominations) 10%, Jewish (tiny communities in Damascus, Al Qamishli, and Aleppo)

Language: Arabic (official), Kurdish, Armenian, Aramaic, Circassian (widely understood); French, English (somewhat understood).

CIA World Factbook, accessed August 16, 2013

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Key Ethnic and Sectarian Differences by Country: Gulf & Arabia - I

Bahrain

Ethnicity: Bahraini 62.4%, non-Bahraini 37.6% (2001 census). Population 1,281,332, includes 235,108 non-nationals (July 2013 est..)

Religion: Muslim (Shia and Sunni – no break out) 81.2%, Christian 9%, other 9.8% (2001 census)

Language: Arabic (official), English, Farsi, Urdu.

Iran

Ethnicity Persian 61%, Azeri 16%, Kurd 10%, Lur 6%, Baloch 2%, Arab 2%, Turkmen and Turkic tribes 2%, other 1%

Religion: Muslim 98% (Shia 89%, Sunni 9%), other (includes Zoroastrian, Jewish, Christian, and Baha'i) 2%

Language: Persian and Persian dialects 58%, Turkic and Turkic dialects 26%, Kurdish 9%, Luri 2%, Balochi 1%, Arabic 1%, Turkish 1%, other 2%.

Iraq

Ethnicity: Arab 75%-80%, Kurdish 15%-20%, Turkoman, Assyrian, or other 5%

Religion: Muslim 97% (Shia 60%-65%, Sunni 32%-37%), Christian or other 3%

note: while there has been voluntary relocation of many Christian families to northern Iraq, recent reporting indicates that the overall Christian population may have dropped by as much as 50 percent since the fall of the Saddam Hussein regime in 2003, with many fleeing to Syria, Jordan, and Lebanon

Language: Arabic (official), Kurdish (official in Kurdish regions), Turkoman (a Turkish dialect), Assyrian (Neo-Aramaic), Armenian.

CIA World Factbook, accessed August 16, 2013

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Key Ethnic and Sectarian Differences by Country: Gulf & Arabia - II

Kuwait

Ethnicity: Kuwaiti 45%, other Arab 35%, South Asian 9%, Iranian 4%, other 7%. Population is 2,695,316 (July 2013 est.,) includes 1,291,354 non-nationals

Religion: Muslim 85% (Sunni 70%, Shia 30%), other (includes Christian, Hindu, Parsi) 15%

Language: Arabic (official), English widely spoken.

Oman

Ethnicity: Arab, Baluchi, South Asian (Indian, Pakistani, Sri Lankan, Bangladeshi), African. Population is 3,154,134, includes 577,293 non-nationals (July 2013 est.).

Religion: Ibadhi Muslim 75%, other (includes Sunni Muslim, Shia Muslim, Hindu) 25%

Language: Arabic (official), English commonly used as a second language

Qatar

Ethnicity: Arab 40%, Indian 18%, Pakistani 18%, Iranian 10%, other 14%

Religion: Muslim 77.5%, Christian 8.5%, other 14% (2004 census)

Language: Arabic (official), English commonly used as a second language.

Saudi Arabia

Ethnicity: Arab 90%, Afro-Asian 10%. Population is 26,939,583 , includes 5,576,076 non-nationals (July 2013 est.). About 80% of the 7.7 million labor force is non-national (2010 est.)

Religion: Muslim 100%

Language: Arabic (official).

CIA World Factbook, accessed August 16, 2013

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Key Ethnic and Sectarian Differences by Country: Gulf & Arabia - III

UAE

Ethnicity: Ethnicity is Emirati 19%, other Arab and Iranian 23%, South Asian 50%, other expatriates (includes Westerners and East Asians) 8% (1982). Population is 5,148,664 . Note: estimate is based on the results of the 2005 census that included a significantly higher estimate of net immigration of non-citizens than previous estimates (July 2011 est.); less than 20% are UAE citizens (1982)

Religion: Muslim 96% (Shia 16%), other (includes Christian, Hindu) 4%

Language: Arabic (official), Persian, English, Hindi, Urdu.

Yemen

Ethnicity: predominantly Arab; but also Afro-Arab, South Asians, Europeans

Religion: Muslim including Shaf'i (Sunni) and Zaydi (Shia), small numbers of Jewish, Christian, and Hindu

Language: Arabic (official)

CIA World Factbook, accessed August 16, 2011

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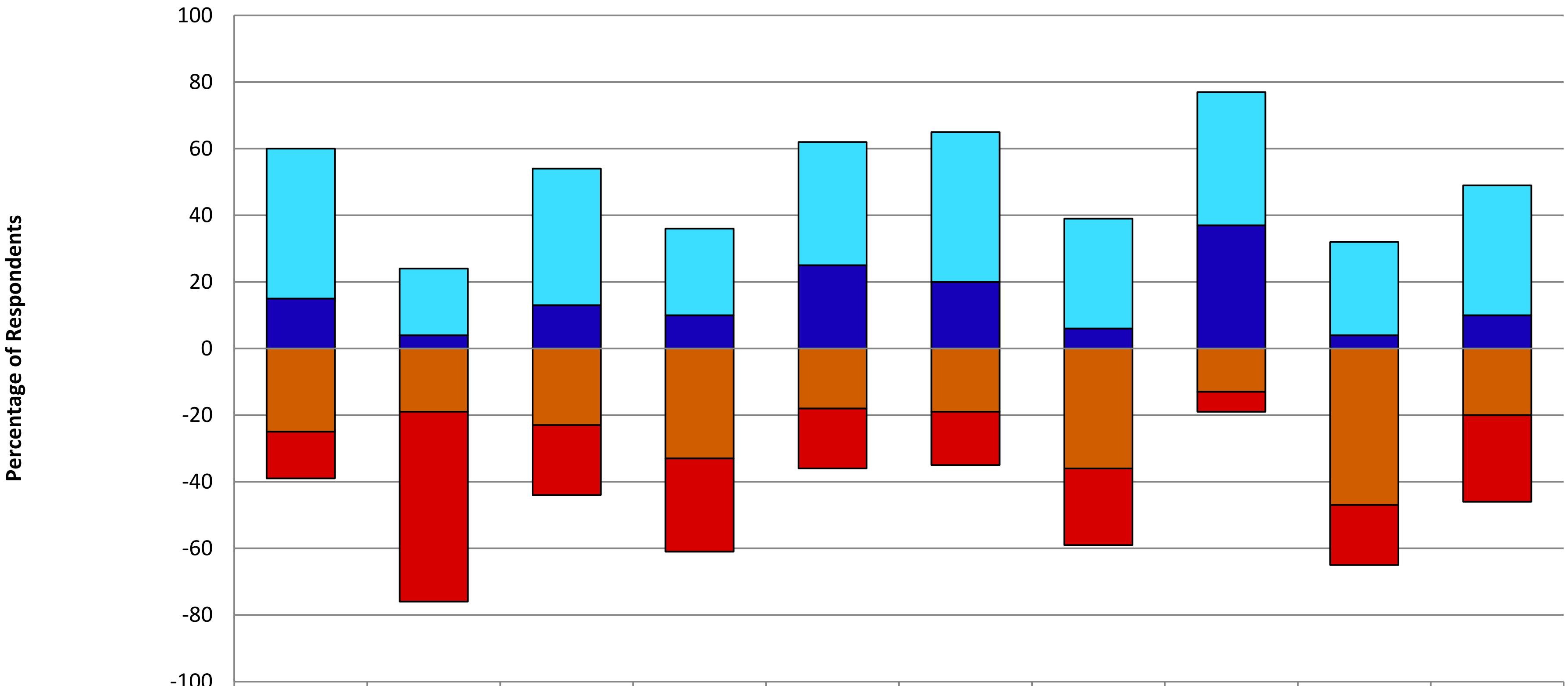
Popular Perceptions of Equal Treatment from Fellow Citizens

(in %)

	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
To a great extent	15	4	13	10	25	20	6	37	4	10
To a medium extent	45	20	41	26	37	45	33	40	28	39
To a limited extent	25	19	23	33	18	19	36	13	47	20
To no extent	14	57	21	28	18	16	23	6	18	26
I don't know/ declined to answer	1	0	2	4	2	1	2	4	2	4

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 8.

Popular Perception of Equal Treatment From Fellow Citizens



	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
Not At All	-14	-57	-21	-28	-18	-16	-23	-6	-18	-26
To a Limited Extent	-25	-19	-23	-33	-18	-19	-36	-13	-47	-20
To a Medium Extent	45	20	41	26	37	45	33	40	28	39
To a Great Extent	15	4	13	10	25	20	6	37	4	10

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 8.

Secularism vs. Religion vs. "Justice" vs. Other Ideological Issues

- Failure of secular options: practical and ideological.
- Combination of repression, economic pressure, youth bulge.
- Danger of religious extremism.
- Building on violence: Arab-Israeli issue, local conflicts, Iraq, counterterrorism.
- Uncertain role of education and clergy.
- "Justice" issue.

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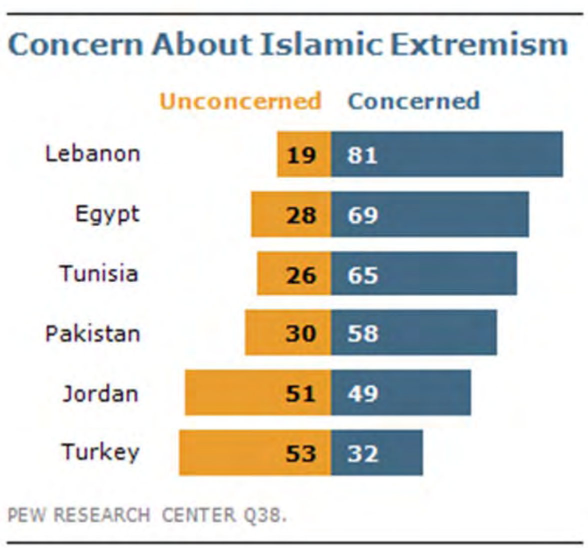
Concerns of Islamic Extremism



Extremism Concerns Steady, Except in Turkey

% Concerned

	2006	2008	2009	2010	2011	2012
	%	%	%	%	%	%
Lebanon	--	78	79	80	78	81
Egypt	68	72	62	61	65	69
Tunisia	--	--	--	--	--	65
Pakistan	74	72	79	65	63	58
Jordan	69	61	44	44	48	49
Turkey	46	41	47	43	52	32

PEW RESEARCH CENTER Q38.

The Pew Research Center, Global Attitudes Project, July 10, 2012, http://www.pewglobal.org/2012/07/10/most-muslims-want-democracy-personal-freedoms-and-islam-in-political-life/, accessed August 12, 2013

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Views of Hamas and Hezbollah

Rating Hamas

	Fav %	Unfav %	DK %
Tunisia	50	31	20
Jordan	44	53	3
Egypt	39	56	5
Lebanon	30	67	2
Christian	*14*	*84*	*1*
Shia	*58*	*42*	*0*
Sunni	*28*	*65*	*7*
Pakistan	15	12	73
Turkey	10	65	25

PEW RESEARCH CENTER Q8p.

Rating Hezbollah

	Fav %	Unfav %	DK %
Tunisia	46	33	21
Lebanon	40	60	0
Christian	*33*	*67*	*0*
Shia	*94*	*6*	*0*
Sunni	*5*	*94*	*1*
Jordan	29	70	1
Egypt	20	75	6
Pakistan	15	11	74
Turkey	6	71	24

PEW RESEARCH CENTER Q8q.

The Pew Research Center, Global Attitudes Project, July 10, 2012, http://www.pewglobal.org/2012/07/10/most-muslims-want-democracy-personal-freedoms-and-islam-in-political-life/, accessed August 12, 2013

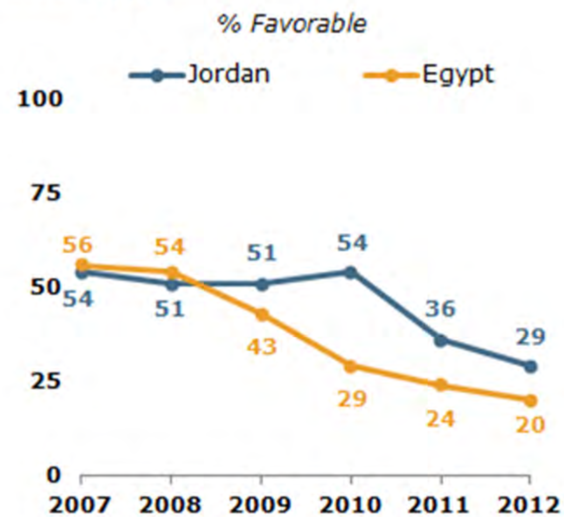
Views of Hamas Over Time

% Favorable

	2007 %	2008 %	2009 %	2010 %	2011 %	2012 %
Tunisia	--	--	--	--	--	50
Jordan	62	55	56	60	47	44
Egypt	49	42	52	47	45	39
Lebanon	25	25	30	34	34	30
Pakistan	43	18	14	18	11	15
Turkey	14	6	5	9	10	10

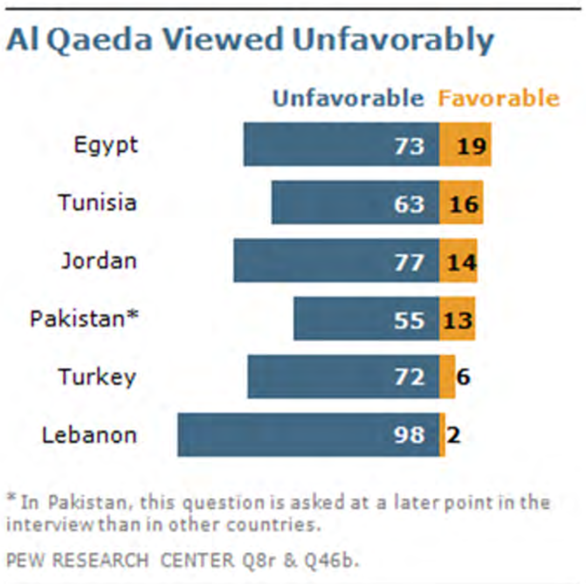
PEW RESEARCH CENTER Q8p.

Hezbollah Losing Favor in Jordan and Egypt



PEW RESEARCH CENTER Q8q.

Views of Al Qaeda and the Taliban



Rating the Taliban

	Fav %	Unfav %	DK %
Egypt	19	76	6
Pakistan*	13	66	20
Tunisia	12	59	28
Jordan	10	81	10
Turkey	7	69	24
Lebanon	2	97	1

* In Pakistan, this question is asked at a later point in the interview than in other countries.

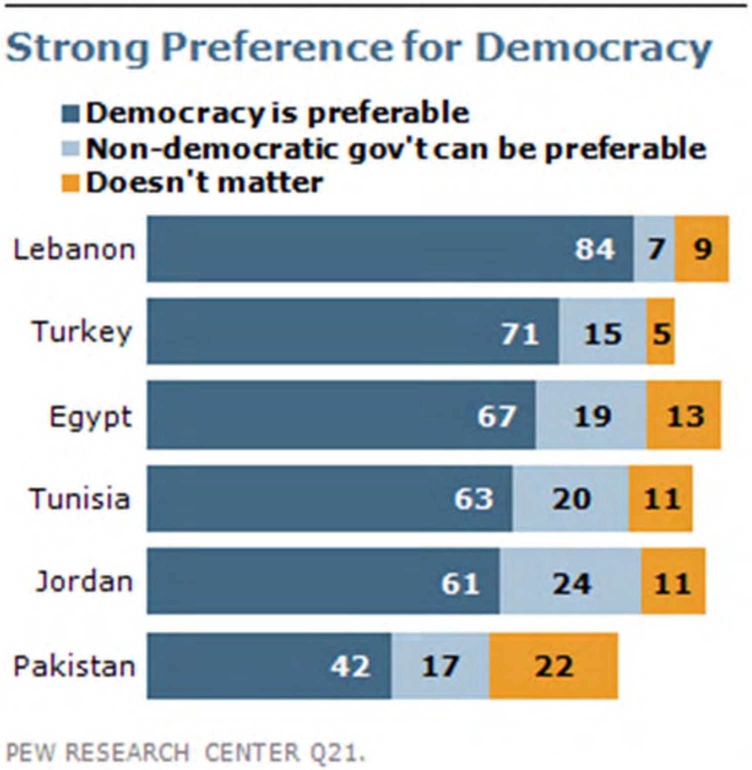
PEW RESEARCH CENTER Q8x & Q46d.

The Pew Research Center, Global Attitudes Project, July 10, 2012, http://www.pewglobal.org/2012/07/10/most-muslims-want-democracy-personal-freedoms-and-islam-in-political-life/, accessed August 12, 2013

Rapid Social Change and Uncertainty and Risk

Past social norms, social stability, status, roles, and leadership elites often replaced by constant change in unstable socially anonymous conditions

Public Support for Democracy



What is Important in a Democracy?

	Lebanon	Turkey	Pakistan	Jordan
% Very important	%	%	%	%
Prospering economy	90	74	54	70
Free elections	89	73	63	56
Freedom of religion	87	68	63	60
Political stability	90	61	46	65
Equal rights for women	76	65	60	48
Free speech	87	68	56	40
Small gap between rich and poor	89	71	49	42
Uncensored media	73	62	28	44
Uncensored access to internet	66	56	20	31

A modified version of this question was asked in Egypt and Tunisia.

PEW RESEARCH CENTER Q22a-i.

The Pew Research Center, Global Attitudes Project, July 10, 2012, http://www.pewglobal.org/2012/07/10/most-muslims-want-democracy-personal-freedoms-and-islam-in-political-life/, accessed August 12, 2013

Public Support for Islam in Politics and Law

Islam Plays a Large and Positive Role in Politics

	Islam plays a...	*And this is...**	
	Large role	**Good**	**Bad**
	%	%	%
Tunisia	84	82	11
Egypt	66	61	30
Turkey	64	57	33
Pakistan	62	79	13
Lebanon	61	43	36
Jordan	31	48	46

* Percentages among those who say Islam plays a large role.

PEW RESEARCH CENTER Q62 & Q63.

Many Believe Quran Should Hold Sway Over Laws

	Laws should...			
	Strictly follow the Quran	**Follow the values and principles of Islam**	**Not be influenced by the Quran**	**DK**
	%	%	%	%
Pakistan	82	15	0	2
Jordan	72	26	1	1
Egypt	60	32	6	3
Tunisia	23	64	12	2
Turkey	17	44	27	13
Lebanon	17	35	42	7

PEW RESEARCH CENTER Q39.

The Pew Research Center, Global Attitudes Project, July 10, 2012, http://www.pewglobal.org/2012/07/10/most-muslims-want-democracy-personal-freedoms-and-islam-in-political-life/, accessed August 12, 2013

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Excessive Security, Weak Rule of Law, and Sometimes Repression

Problems threaten stability and often the regime as much as the people

Civil Challenges to Stability

- **Rigid and/or Repressive Regimes; Lack of Peaceful Civil and Political Alternatives.**
- **Problems with Security Forces Police and Rule of Law.**
- **Ethnic, Sectarian, Tribal, and Regional Differences.**
- **Major Demographic Pressures – Youth Bulge.**
- **Social Change, Hyperurbanization, Media, Education**
- **Economic Pressures.**
- **Uncertain Governance: Services, Education, Health, Utilities (power, water, sewers/garbage)**
- **Secularism vs. Religion vs. “Justice” vs. Other Ideological Issues**

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Rigid and/or Repressive Regimes; Lack of Peaceful Civil and Political Alternatives

- Democracy and freedom of expression are only one set of issues.
- Elitism, corruption, concentration of wealth, failures of government services are critical.
- So are:
  - Lack of proper training and equipment at all levels of police and justice system, grossly inadequate pay.
  - Favoritism, cronyism, oligarchy, age.
  - Misuse of courts, police, and security services.
  - Misuse of detention, confessions-based justice, extreme interrogation.
  - Restrictions on freedom of expression and travel.
  - Failure to fund key governance: Services, Education, Health, Utilities (power, water, sewers/garbage)

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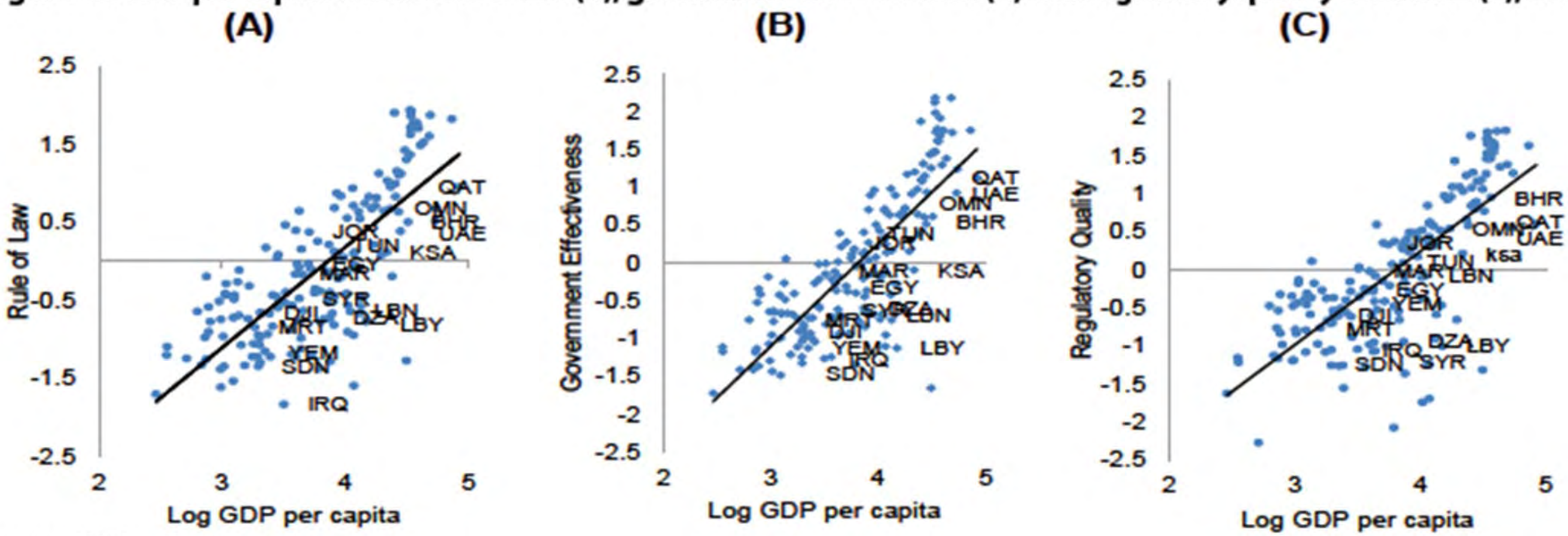
UNDP Estimate of Interaction Between Income, Governance, Rule of Law and Regulation

Figure 40: GDP per capita versus rule of law (A), government effectiveness (B) and regulatory quality estimates (C), 2009



Source: WDI online datasets.
Note: Arab Countries included are Algeria, Bahrain, Djibouti, Egypt, Iraq, Jordan, Lebanon, Libya, Mauritania, Morocco, Oman, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, UAE and Yemen.

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, p. 66

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Personal Happiness with Current Situation in MENA Countries

Extremely Satisfied	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Mental wellbeing	62	74	49	62	67	52	55	72	58	53	63	68	74	45
Relationship with family	52	57	57	49	51	55	49	53	61	56	53	42	56	53
Current physical health	43	54	44	44	41	36	38	51	44	41	40	42	47	35
Independence to take own decisions	42	50	36	44	39	36	38	44	40	40	40	37	43	36
Support received from family	36	37	41	32	29	39	34	36	46	48	39	27	35	44
Freedom to socialize (i.e. make friends)	35	38	33	36	32	35	41	40	35	30	29	35	41	32
Freedom of expression	34	37	21	37	30	31	32	38	36	35	29	24	40	29
Freedom to follow one's beliefs	29	28	37	27	27	33	35	23	37	33	28	32	34	34
Financial independence	24	24	22	26	23	25	18	20	26	30	28	20	22	19
Opportunities to socialize	23	24	20	24	21	21	26	27	22	20	19	22	25	20
Current standard of living	17	18	19	20	10	16	7	15	20	22	18	12	14	17

Figures listed are those that responded with "extremely satisfied." All figures presented as percentages.

"Happiness Survey in Middle East and North Africa," survey conducted by Bayt and YouGov, July 2013. p. 10
http://img.b8cdn.com/images/uploads/article_docs/bayt_happiness_0713_17650_EN.pdf Accessed August 13, 2013

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Factors Contributing to Stress in MENA Countries

Q. Which of the following reasons do you believe contribute towards the stress in your life?

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Increasing cost of living	73	74	55	75	83	63	78	62	65	65	68	77	76	74
Current economic situation of the country where I live in	54	37	32	74	70	25	72	41	19	12	19	82	72	17
Work related issues	47	53	52	40	48	51	50	50	64	56	52	33	42	60
Current political situation of the country where I live	46	29	51	71	32	24	76	17	6	8	17	86	59	5
Inability to maintain a good work/life balance	43	38	48	42	39	44	54	35	44	50	47	31	36	50
Demands of the family	39	33	41	40	44	37	26	44	41	34	43	30	32	36
The physical environment and surrounding (i.e. weather conditions, ever changing infrastructure, etc.)	26	19	24	27	18	38	17	20	18	26	36	26	19	23
Need to keep up with technological changes	16	28	11	18	16	8	6	15	25	11	15	23	12	10
Inability to meet new people and make new friends	16	16	22	14	12	19	11	15	20	18	23	13	7	19
Other	6	7	7	5	6	11	6	7	11	10	10	3	6	10
Don't know/ Not sure	2	4	2	1	2	3	0	5	3	3	3	2	2	3

"Happiness Survey in Middle East and North Africa," survey conducted by Bayt and YouGov, July 2013. p. 29
http://img.b8cdn.com/images/uploads/article_docs/bayt_happiness_0713_17650_EN.pdf Accessed August 13, 2013

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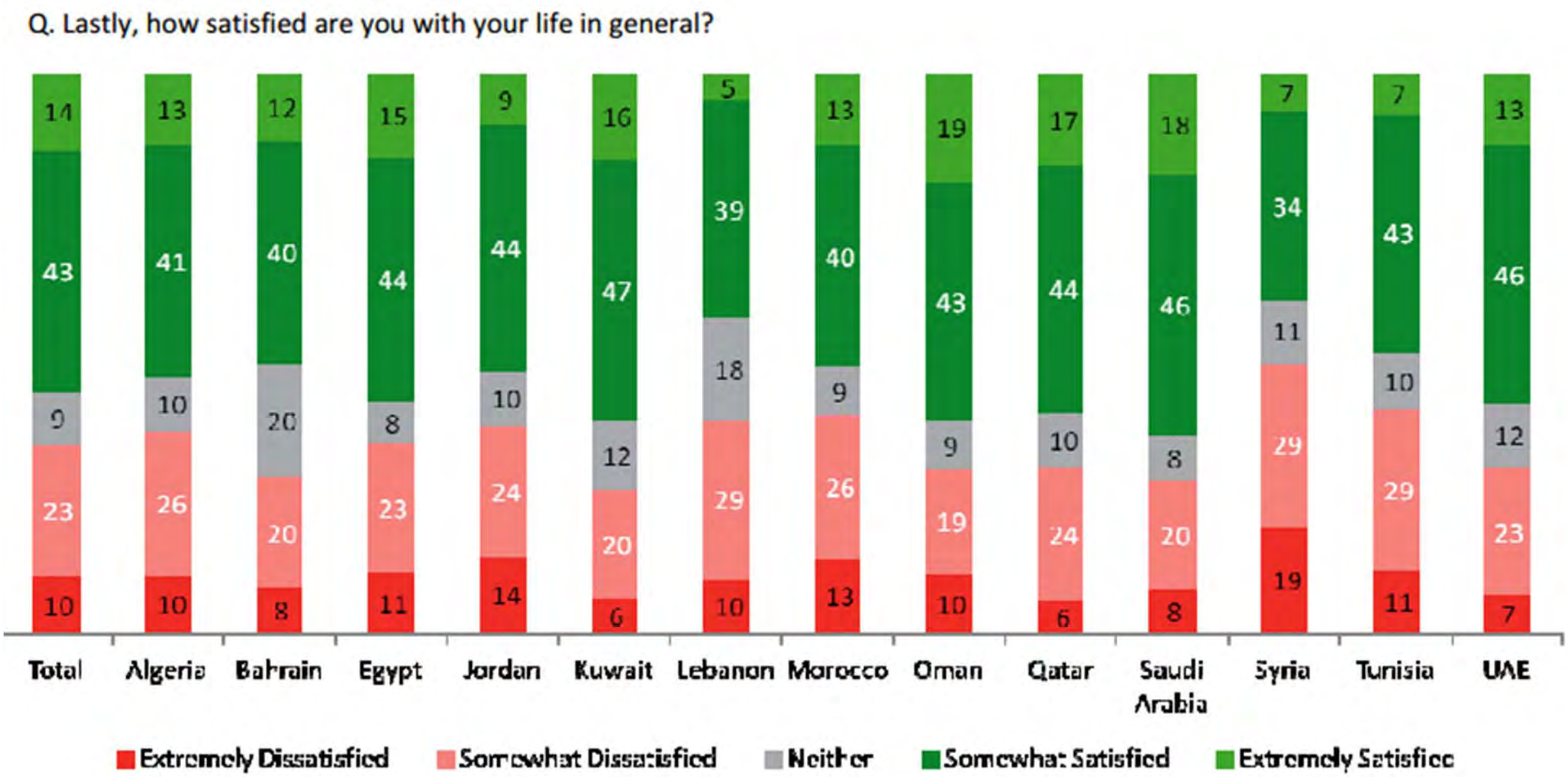
General Satisfaction with Country of Residence in MENA-I

Q. Which of the following do you consider the top 5 most important factors that impact your general happiness levels in your country of residence? (Please select up to 5)

	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE
General safety and security	65	66	48	63	67	62	63	63	66	72	62	79	67	71
Leading a stable financial life	63	61	62	65	63	60	59	62	55	61	63	71	63	58
Employment opportunities	51	51	51	49	51	53	54	58	41	53	50	51	63	54
Low cost of living	41	38	35	43	44	37	43	40	33	29	39	51	54	32
Stability of political environment	41	39	34	44	41	32	50	32	37	33	42	54	40	37
Attitude and behavior of people in general	37	33	46	41	32	42	34	33	36	37	33	26	33	39
Availability of utilities	35	33	34	38	32	36	32	26	38	37	36	34	28	31
Ability to maintain healthy personal relationships with family and friends	32	37	40	29	33	34	27	37	39	39	28	26	29	35
Access to healthcare facilities	27	25	28	24	25	33	27	29	33	37	29	16	21	30
Availability of entertainment avenues (malls, parks, etc.)	21	23	28	16	23	26	16	19	23	28	25	18	23	26
Opportunities to socialize	18	16	20	16	17	23	23	21	20	18	16	16	17	22
Availability of public transport facilities	18	22	15	18	16	16	13	17	15	15	16	17	16	20
General infrastructure	14	14	16	12	16	12	10	18	21	10	18	15	18	18
Other	5	4	4	5	5	4	8	5	4	5	6	3	3	3

"Happiness Survey in Middle East and North Africa," survey conducted by Bayt and YouGov, July 2013. p. 26
http://img.b8cdn.com/images/uploads/article_docs/bayt_happiness_0713_17650_EN.pdf Accessed August 13, 2013

General Satisfaction with Country of Residence in MENA-II



	Extremely Dissatisfied	Somewhat Dissatisfied	Neither	Somewhat Satisfied	Extremely Satisfied
Total	10	23	9	43	14
Algeria	10	26	10	41	13
Bahrain	8	20	20	40	12
Egypt	11	23	8	44	15
Jordan	14	24	10	44	9
Kuwait	6	20	12	47	16
Lebanon	10	29	18	39	5
Morocco	13	26	9	40	13
Oman	10	19	9	43	19
Qatar	6	24	10	44	17
Saudi Arabia	8	20	8	46	18
Syria	19	29	11	34	7
Tunisia	11	29	10	43	7
UAE	7	23	12	46	13

"Happiness Survey in Middle East and North Africa," survey conducted by Bayt and YouGov, July 2013. p. 33
http://img.b8cdn.com/images/uploads/article_docs/bayt_happiness_0713_17650_EN.pdf Accessed August 13, 2013

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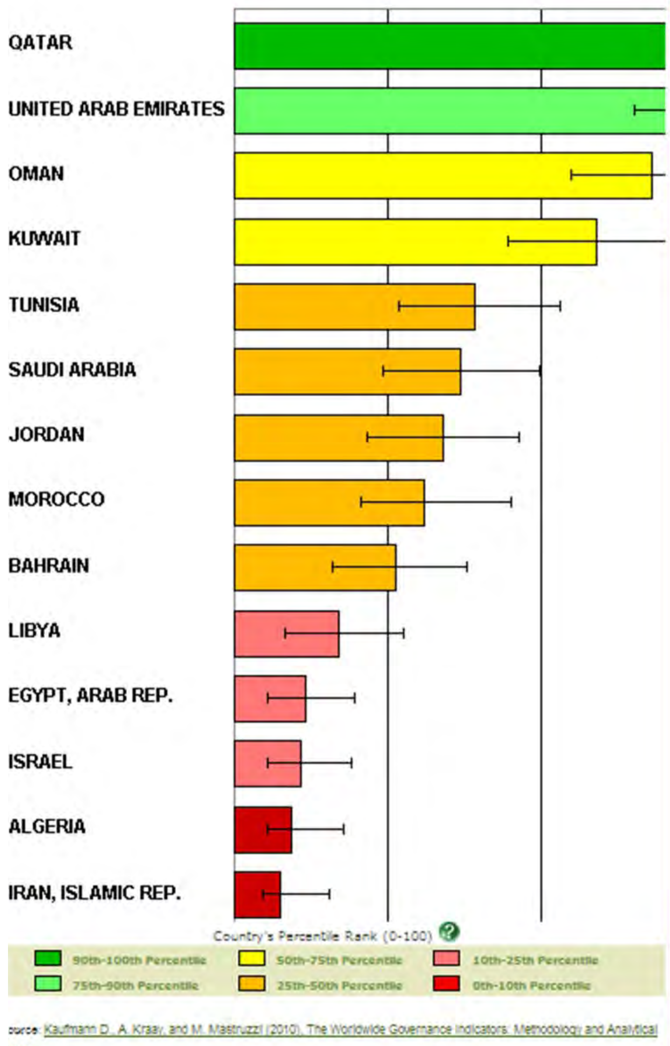
Figure 60

Political Stability (by world percentile)-2011



Country	Sources	Year	Percentile Rank (0-100)	Governance Score (-2.5 to +2.5)	Standard Error
ALGERIA	7	2011	9.4	-1.35	0.24
BAHRAIN	7	2011	26.4	-0.64	0.24
EGYPT, ARAB REP.	7	2011	11.8	-1.29	0.24
IRAN, ISLAMIC REP.	7	2011	7.5	-1.45	0.24
IRAQ	5	2011	3.8	-1.95	0.27
ISRAEL	8	2011	10.8	-1.30	0.24
JORDAN	8	2011	34.0	-0.42	0.24
KUWAIT	7	2011	59.0	+0.33	0.24
LEBANON	7	2011	6.6	-1.55	0.24
LIBYA	6	2011	17.0	-1.01	0.25
MOROCCO	6	2011	31.1	-0.47	0.25
OMAN	7	2011	67.9	+0.62	0.24
QATAR	7	2011	90.6	+1.21	0.25
SAUDI ARABIA	6	2011	36.8	-0.30	0.25
SYRIAN ARAB REPUBLIC	7	2011	4.7	-1.84	0.24
TUNISIA	7	2011	39.2	-0.23	0.24
UNITED ARAB EMIRATES	8	2011	77.4	+0.96	0.24
YEMEN, REP.	7	2011	1.9	-2.29	0.24

Expand All | Collapse All

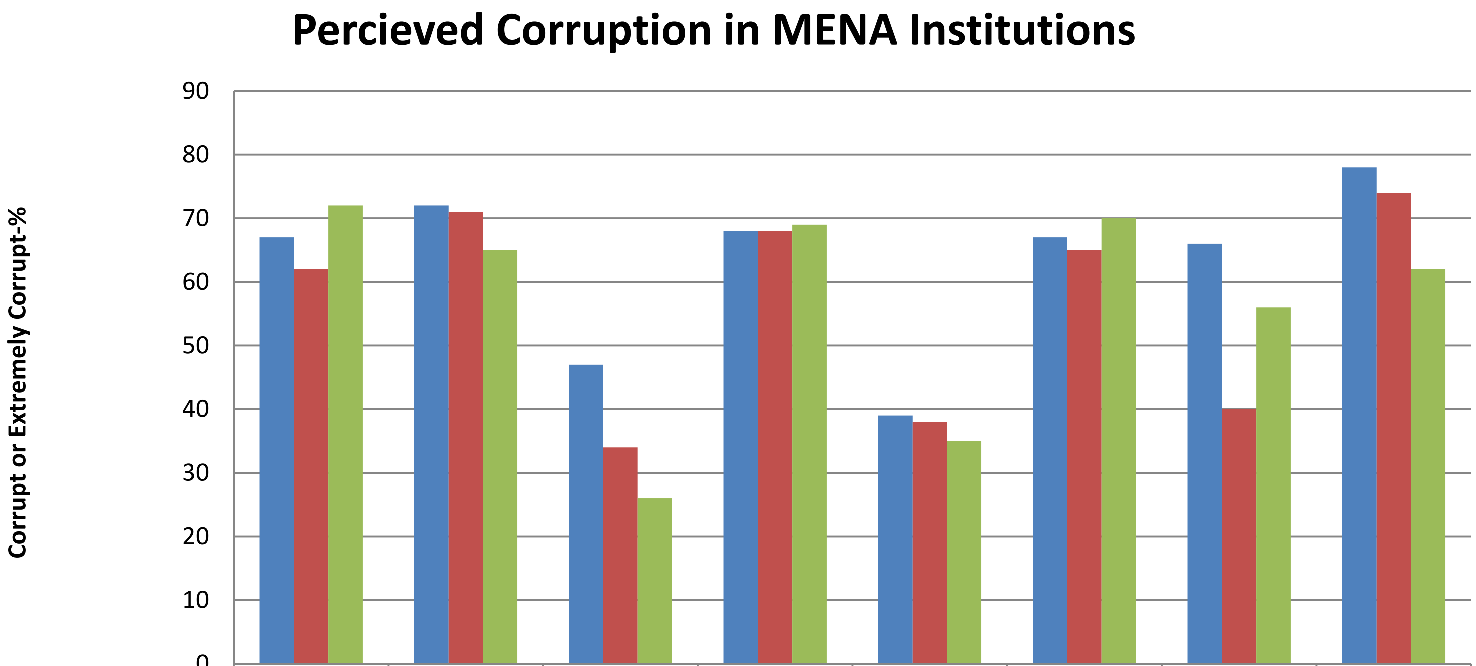
90th-100th Percentile | 50th-75th Percentile | 10th-25th Percentile
75th-90th Percentile | 25th-50th Percentile | 0th-10th Percentile

Source: Kaufmann D., A. Kraay, and M. Mastruzzi (2010), The Worldwide Governance Indicators: Methodology and Analytical

Political stability and Absence of Violence "measures the perceptions of the likelihood that the government will be destabilized or overthrown by unconstitutional or violent means, including domestic violence and terrorism." Higher rankings show more political stability.

The World Bank, World Governance Indicators Project, Accessed August 12, 2013
http://info.worldbank.org/governance/wgi/mc_chart.asp

Corruption in MENA Civil Institutions



	Algeria	Egypt	Iraq	Lebanon	Libya	Morocco	Tunisia	Yemen
Political Parties	67	72	47	68	39	67	66	78
Parliament/Legislature	62	71	34	68	38	65	40	74
Legal System/Judiciary	72	65	26	69	35	70	56	62

Transparency International, Global Corruption Barometer 2013, http://www.transparency.org/research/gcb/, Accessed August 13, 2013

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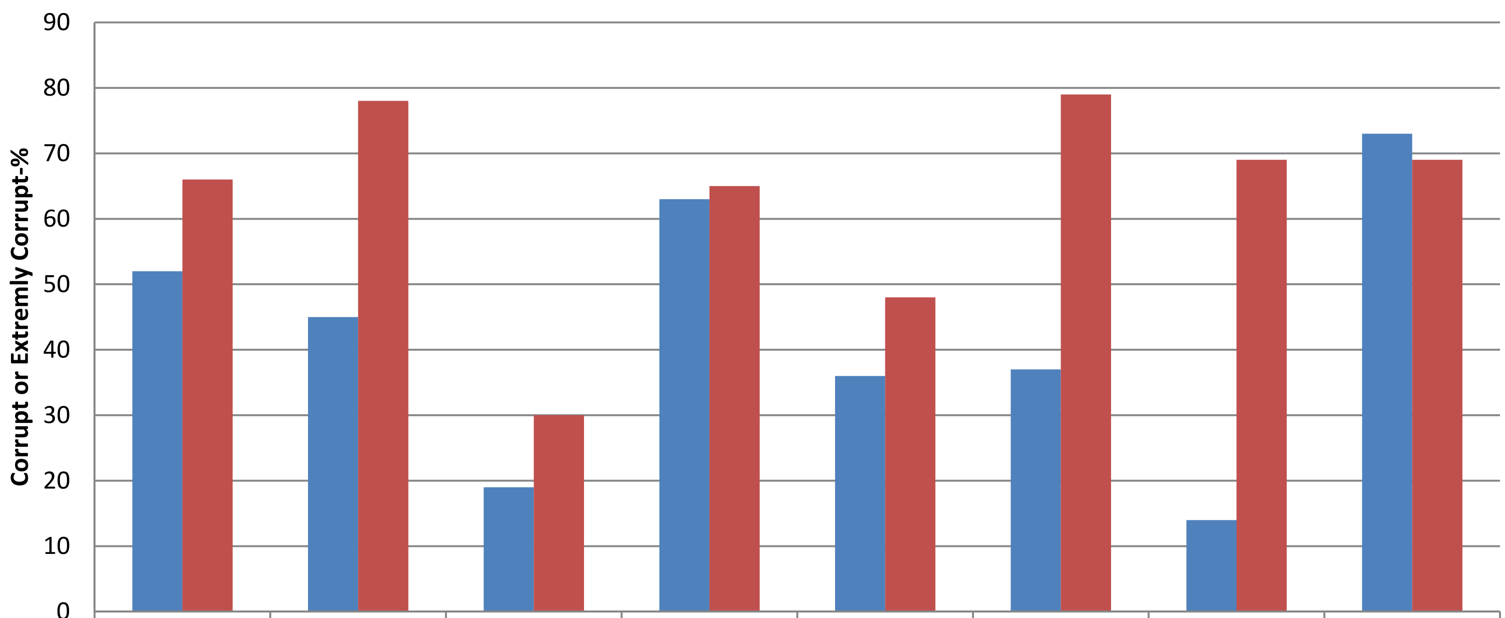
Corruption in MENA Military/Police Institutions

Percieved Corruption in MENA Institutions



	Algeria	Egypt	Iraq	Lebanon	Libya	Morocco	Tunisia	Yemen
Military	52	45	19	63	36	37	14	73
Police	66	78	30	65	48	79	69	69

Transparency International, Global Corruption Barometer 2013, http://www.transparency.org/research/gcb/, Accessed August 13, 2013

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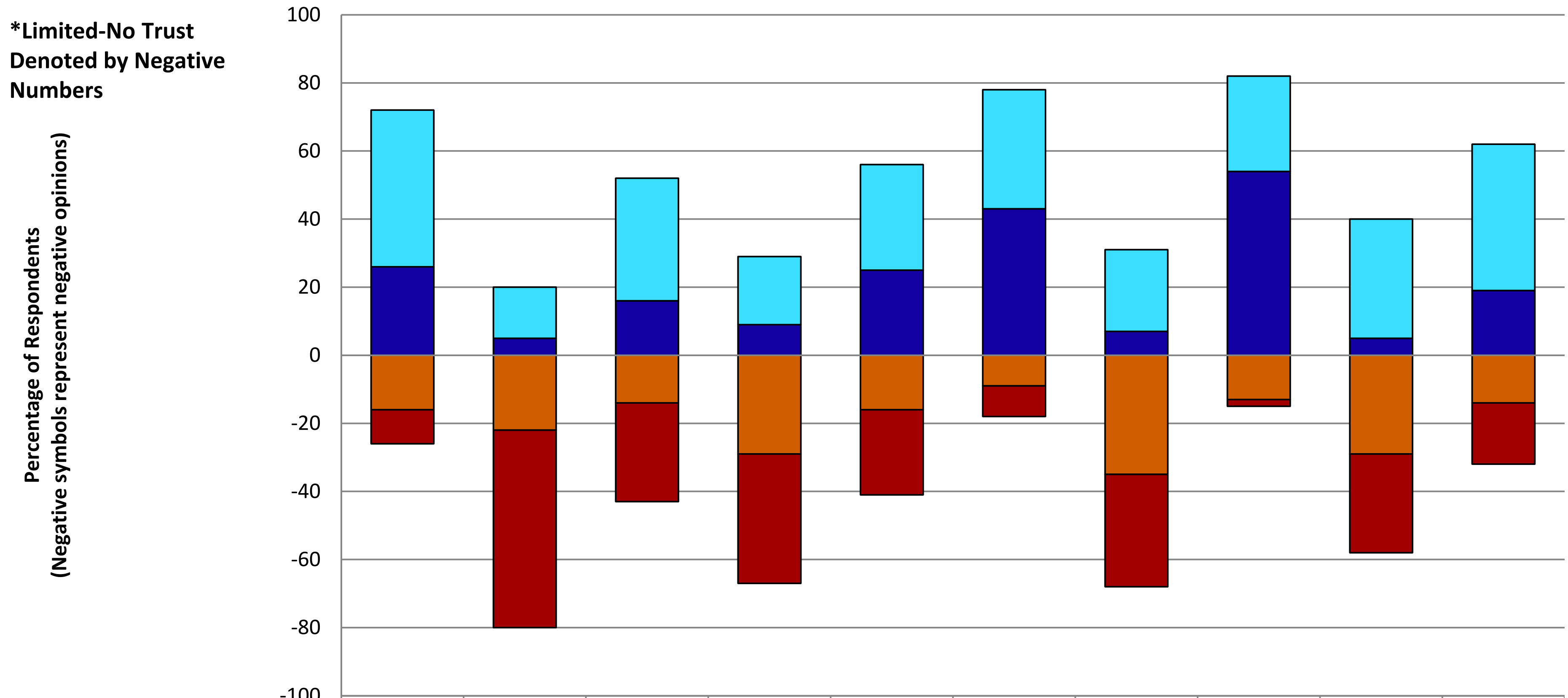
Popular Perceptions of State Institutions:

Popular Trust in the Government (Cabinet)



	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I absolutely do not trust it	-10	-58	-29	-38	-25	-9	-33	-2	-29	-18
I trust it to a limited extent	-16	-22	-14	-29	-16	-9	-35	-13	-29	-14
I trust it to a medium extent	46	15	36	20	31	35	24	28	35	43
I trust it to a great extent	26	5	16	9	25	43	7	54	5	19

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 3.

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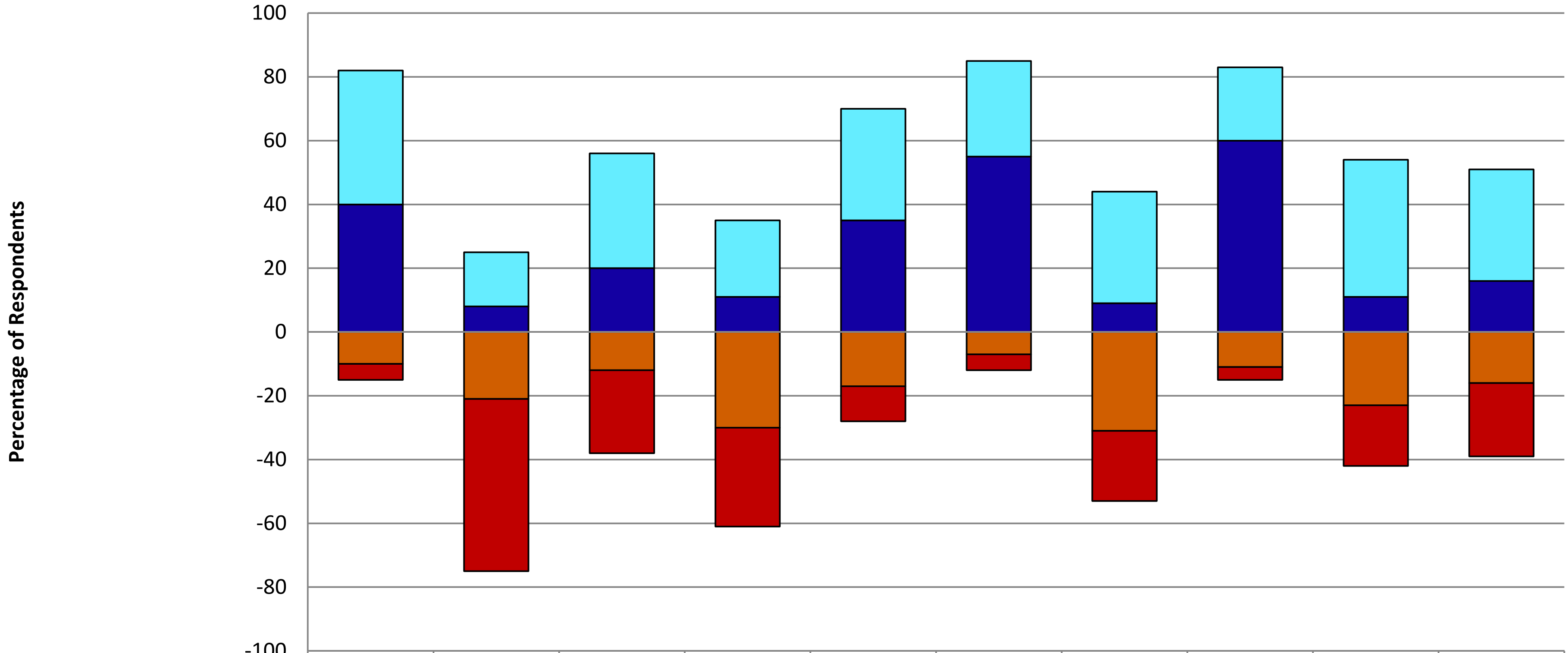
Popular Perceptions of State Institutions:

Popular Trust in the Judiciary

***Limited-No Trust Denoted by Negative Numbers**



	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I absolutely do not trust it	-5	-54	-26	-31	-11	-5	-22	-4	-19	-23
I trust it to a limited extent	-10	-21	-12	-30	-17	-7	-31	-11	-23	-16
I trust it to a medium extent	42	17	36	24	35	30	35	23	43	35
I trust it to a great extent	40	8	20	11	35	55	9	60	11	16

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 4.

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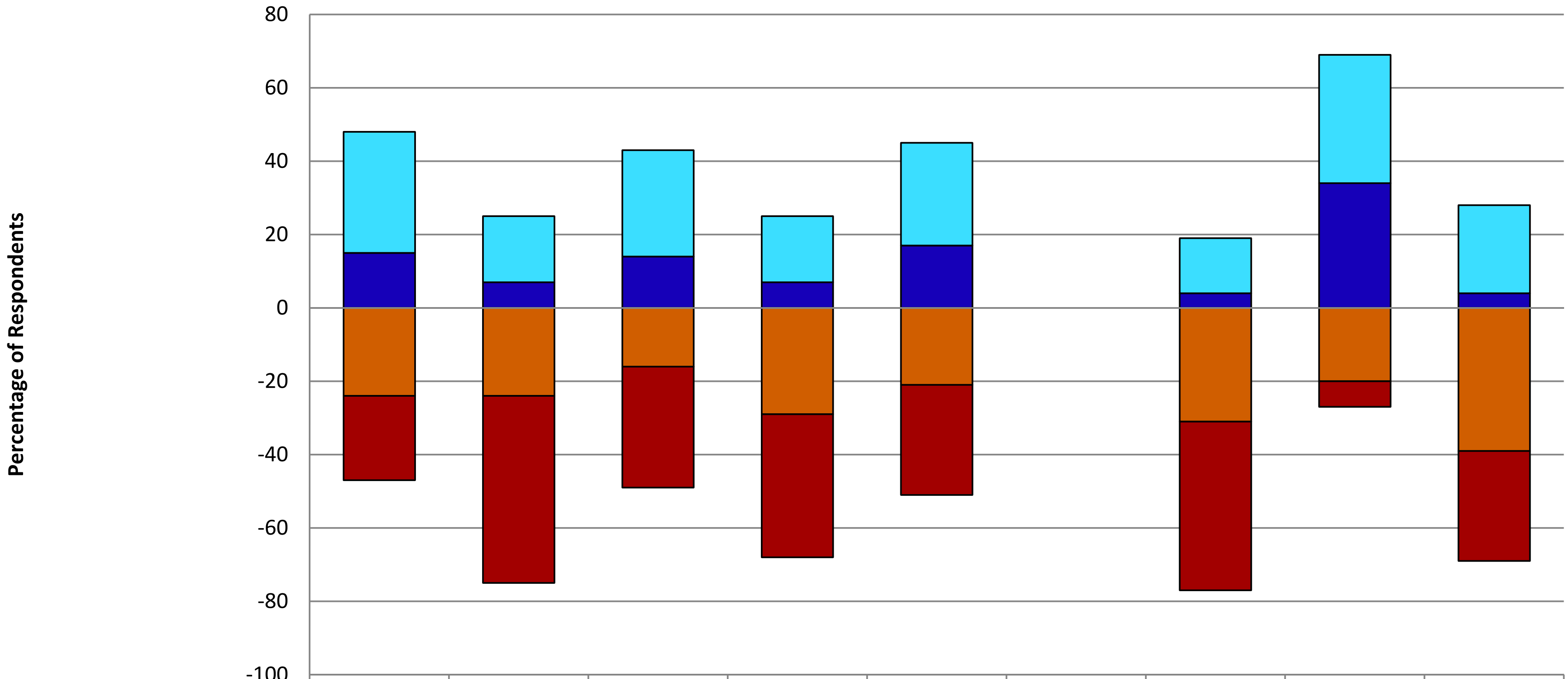
Popular Perceptions of State Institutions:

Popular Trust in the Elected Council of Representatives (the Parliament)

***Limited-No Trust Denoted by Negative Numbers**



	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq
I absolutely do not trust it	-23	-51	-33	-39	-30		-46	-7	-30
I trust it to a limited extent	-24	-24	-16	-29	-21		-31	-20	-39
I trust it to a medium extent	33	18	29	18	28		15	35	24
I trust it to a great extent	15	7	14	7	17		4	34	4

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 5.

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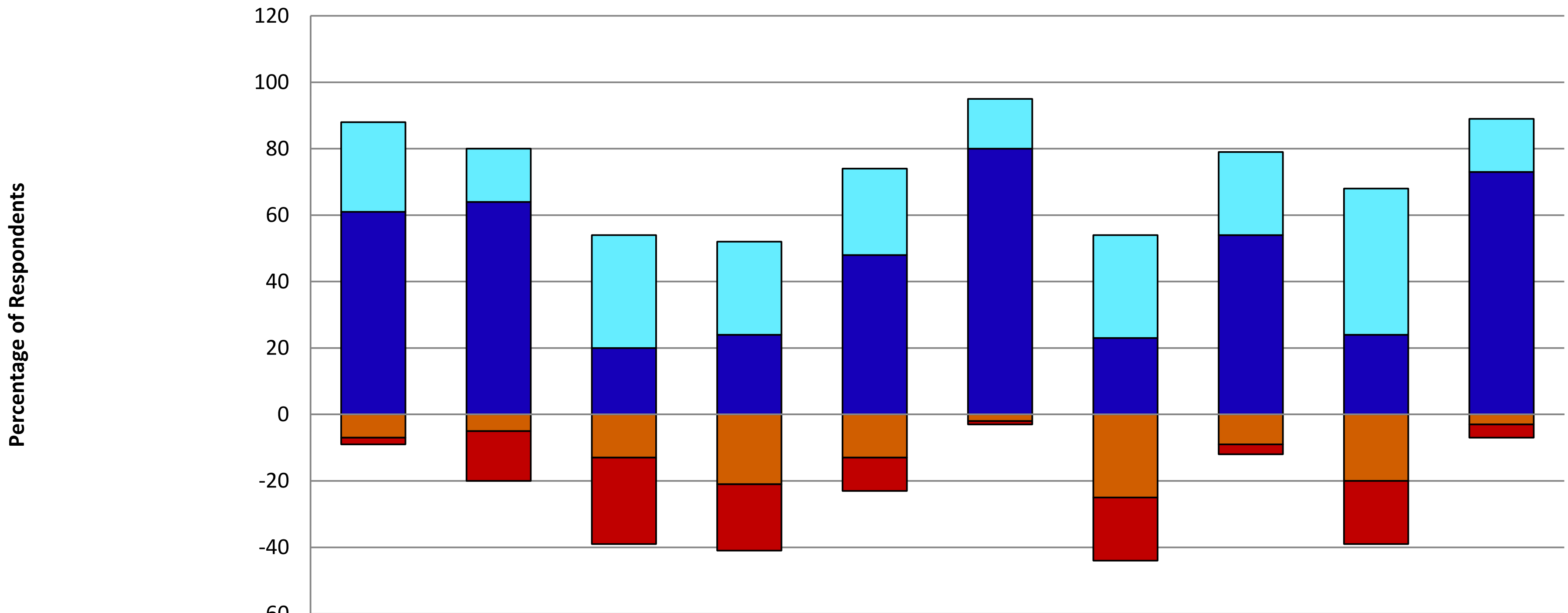
Popular Perceptions of State Institutions:

Popular Trust in the Armed Forces (the Army)

***Limited-No Trust Denoted by Negative Numbers**



	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I absolutely do not trust it	-2	-15	-26	-20	-10	-1	-19	-3	-19	-4
I trust it to a limited extent	-7	-5	-13	-21	-13	-2	-25	-9	-20	-3
I trust it to a medium extent	27	16	34	28	26	15	31	25	44	16
I trust it to a great extent	61	64	20	24	48	80	23	54	24	73

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 6.

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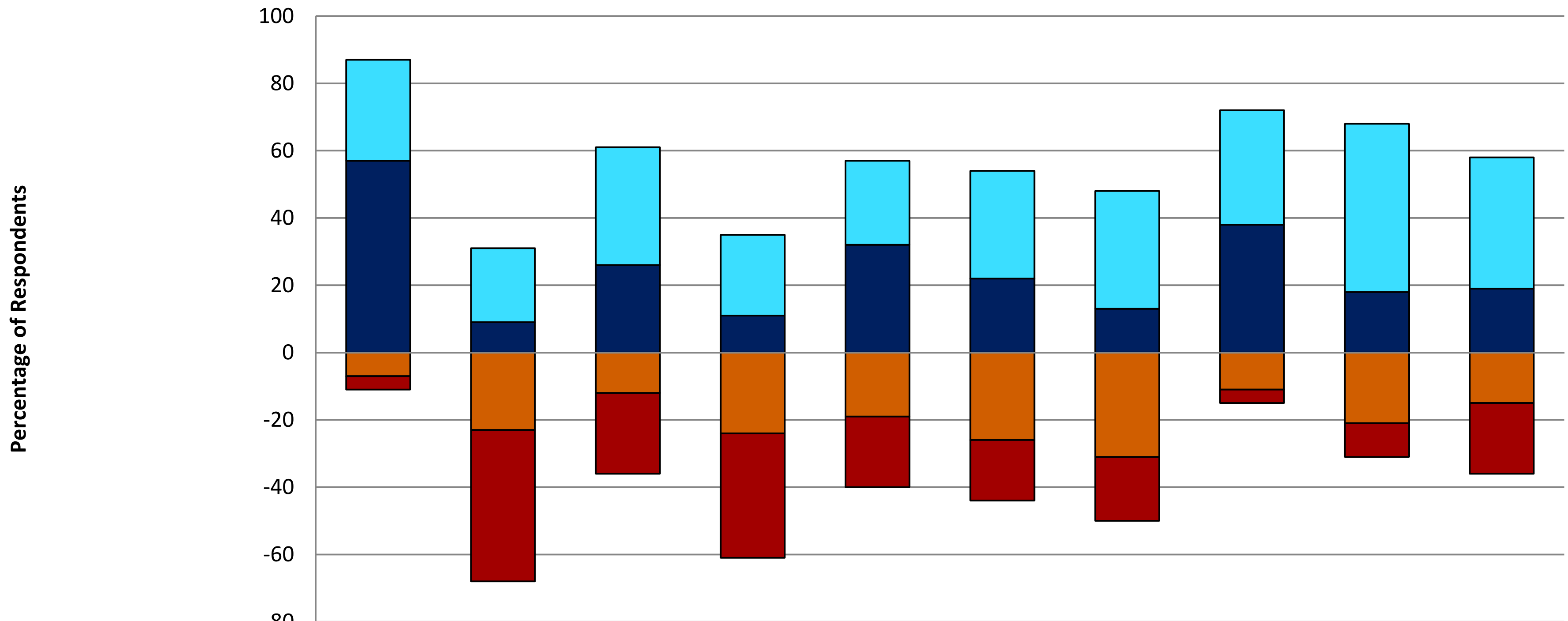
Popular Perceptions of State Institutions:

Popular Trust in the Public Security Forces (the Police)

***Limited-No Trust Denoted by Negative Numbers**



	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I absolutely do not trust it	-4	-45	-24	-37	-21	-18	-19	-4	-10	-21
I trust it to a limited extent	-7	-23	-12	-24	-19	-26	-31	-11	-21	-15
I trust it to a medium extent	30	22	35	24	25	32	35	34	50	39
I trust it to a great extent	57	9	26	11	32	22	13	38	18	19

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 7.

Problems with Rules of Law, Security Forces, and Police

- **Excessive use of force and repression by top level national leaders seriously distorts the rule of law and popular support for it.**
- **General lack of fair and adequate courts, legal representation, transparency. Civil criminal justice somewhat arbitrary and leads to excessive punishments.**
- **Corrupt civil justice, dated laws, courts that take excessive time to act and then cannot enforce judgments.**
- **Often arbitrary and confessions based "justice" than reliance on evidence.**
- **Detention facilities often a critical problem area.**
- **Counterterrorism tends to become a form of state terrorism and repression.**
- **Special security courts often unjust, excessive use of internal security services and special arrest, detention, and trial procedures.**
- **Sharp recent growth of paramilitary and CT forces often takes place without improving training, intelligence and equipment, leading to excessive violence rather than necessary restraint.**

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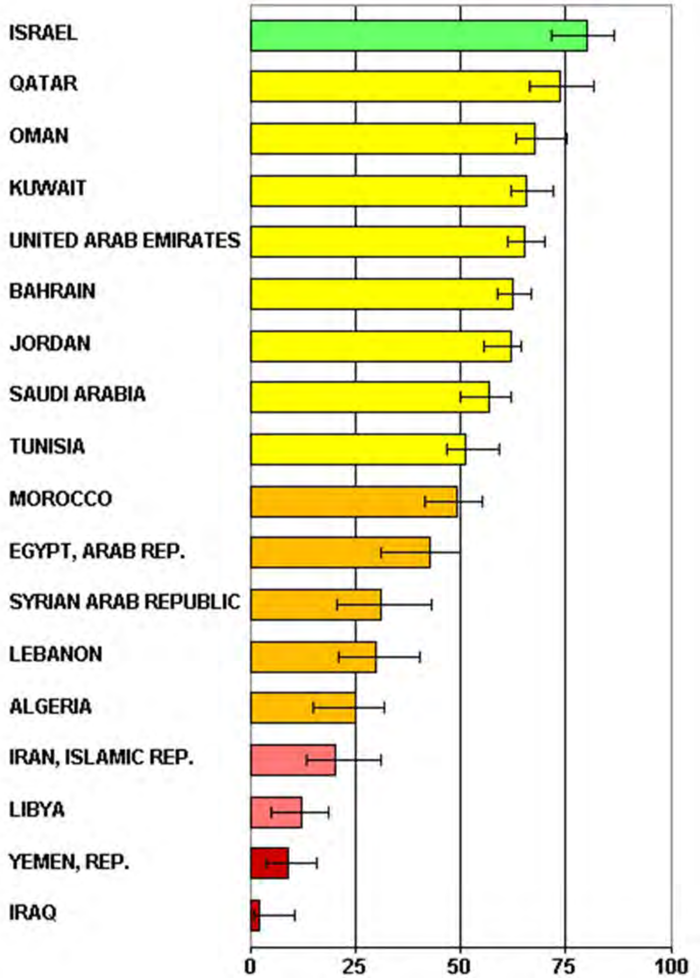
Rule of Law-2011

Figure 78



Country	Sources	Year	Percentile Rank (0-100)	Governance Score (-2.5 to +2.5)	Standard Error
ALGERIA	14	2011	24.9	-0.82	0.13
BAHRAIN	11	2011	62.4	+0.35	0.15
EGYPT, ARAB REP.	15	2011	42.7	-0.42	0.13
IRAN, ISLAMIC REP.	11	2011	20.2	-0.90	0.15
IRAQ	9	2011	2.3	-1.50	0.17
ISRAEL	10	2011	80.3	+0.98	0.15
JORDAN	14	2011	62.0	+0.24	0.13
KUWAIT	10	2011	65.7	+0.50	0.15
LEBANON	14	2011	30.0	-0.68	0.13
LIBYA	11	2011	12.2	-1.16	0.15
MOROCCO	14	2011	49.3	-0.21	0.13
OMAN	9	2011	67.6	+0.63	0.15
QATAR	11	2011	73.7	+0.78	0.15
SAUDI ARABIA	10	2011	56.8	+0.07	0.15
SYRIAN ARAB REPUBLIC	12	2011	31.0	-0.66	0.15
TUNISIA	14	2011	51.2	-0.10	0.13
UNITED ARAB EMIRATES	12	2011	65.3	+0.46	0.14
YEMEN, REP.	14	2011	8.9	-1.25	0.13

Rule of Law “captures perceptions of the extent to which agents have confidence in and abide by the rules of society, and in particular the quality of contract enforcement, property rights, the police, and the courts, as well as the likelihood of crime and violence.” A higher ranking indicates a stronger rule of law.

The World Bank, World Governance Indicators Project, Accessed August 2013
http://info.worldbank.org/governance/wgi/mc_chart.asp

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Ranking Rule of Law in Comparison with 139 Countries World Wide (as of 2013)

Institution	Country Rank (/144)						
	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco
Judicial Independence	123	32	53	48	36	131	81
Favoritism in decisions of government officials	134	14	74	45	99	141	42

The World Economic Forum, The Global Competitiveness Report 2012-2013, Data gathered from specific Country Profiles i.e http://www3.weforum.org/docs/CSI/2012-13/Morocco.pdf. Accessed August 13, 2013

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Press Freedom Index

Rank 2013	Country	Rating	Status
1	**Israel**	31	Partly Free
2	**Tunisia**	52	Partly Free
3	**Lebanon**	53	Partly Free
4	**Kuwait**	59	Partly Free
	Libya	59	Partly Free
6	**Algeria**	61	Not Free
7	**Egypt**	62	Not Free
8	**Jordan**	63	Not Free
9	**Morocco**	66	Not Free
10	**Iraq**	67	Not Free
	Qatar	67	Not Free
12	**Oman**	71	Not Free
13	**United Arab Emirates**	74	Not Free
14	**Yemen**	79	Not Free
15	**Saudi Arabia**	84	Not Free
	West Bank and Gaza Strip	84	Not Free
17	**Bahrain**	86	Not Free
18	**Syria**	88	Not Free
19	**Iran**	92	Not Free

Status	Number of Countries	Percentage of Total
Free	0	0
Partly Free	5	26
Not Free	14	74
TOTAL	**19**	**100**

The Press Freedom Index "currently comprises 23 methodology questions and 109 indicators divided into three broad categories: the legal environment, the political environment, and the economic environment. For each methodology question, a lower number of points is allotted for a more free situation, while a higher number of points is allotted for a less free environment. A country's final score is based on the total of the three categories: A score of 0 to 30 places the country in the Free press group; 31 to 60 in the Partly Free press group; and 61 to 100 in the Not Free press group."

Source: Freedom House, Freedom of the Press 2013, Accessed August 12, 2013.
http://www.freedomhouse.org/sites/default/files/Global%20and%20regional%20tables.pdf

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Excessively Large Paramilitary and National Security Forces-I

MENA Defense Expenditure: Top Ten and Regional Breakdown

	2010	% Regional Total	2011 Estimate	% Regional Total	Real % Change
Saudi Arabia	45.17	38.11%	46.18	36.18%	-3.1%
Israel	17.17	14.49%	18.25	14.30%	-2.8%
Iran*	10.56	8.91%	11.96	9.37%	-3.4%
UAE	8.65	7.29%	9.32	7.30%	5.1%
Algeria	5.59	4.72%	8.61	6.74%	44.01%
Egypt	5.43	4.58%	5.53	4.33%	-3.2%
Iraq	4.19	3.53%	4.79	3.75%	8.9%
Oman	4.19	3.53%	4.29	3.36%	-1.6%
Kuwait	3.91	3.30%	4.05	3.17%	-6.2%
Qatar	3.12	2.63%	3.45	2.71%	8.2%
Sub-Total	**107.97**	**91.09%**	**116.42**	**91.21%**	**-1.01%**
Regional Expenditure Breakdown					
Oil Exporting States	87.97	74.21%	95.57	74.88%	0.08%
Non-Oil Exporting states	30.57	25.79%	32.07	25.12%	-3.16%
Total	**118.53**		**127.64**		**-0.77%**

*Both 2010 and 2011 figures are estimates

Source: IISS, *Military Balance 2012, Chapter Seven, "The Middle East and North Africa."*.

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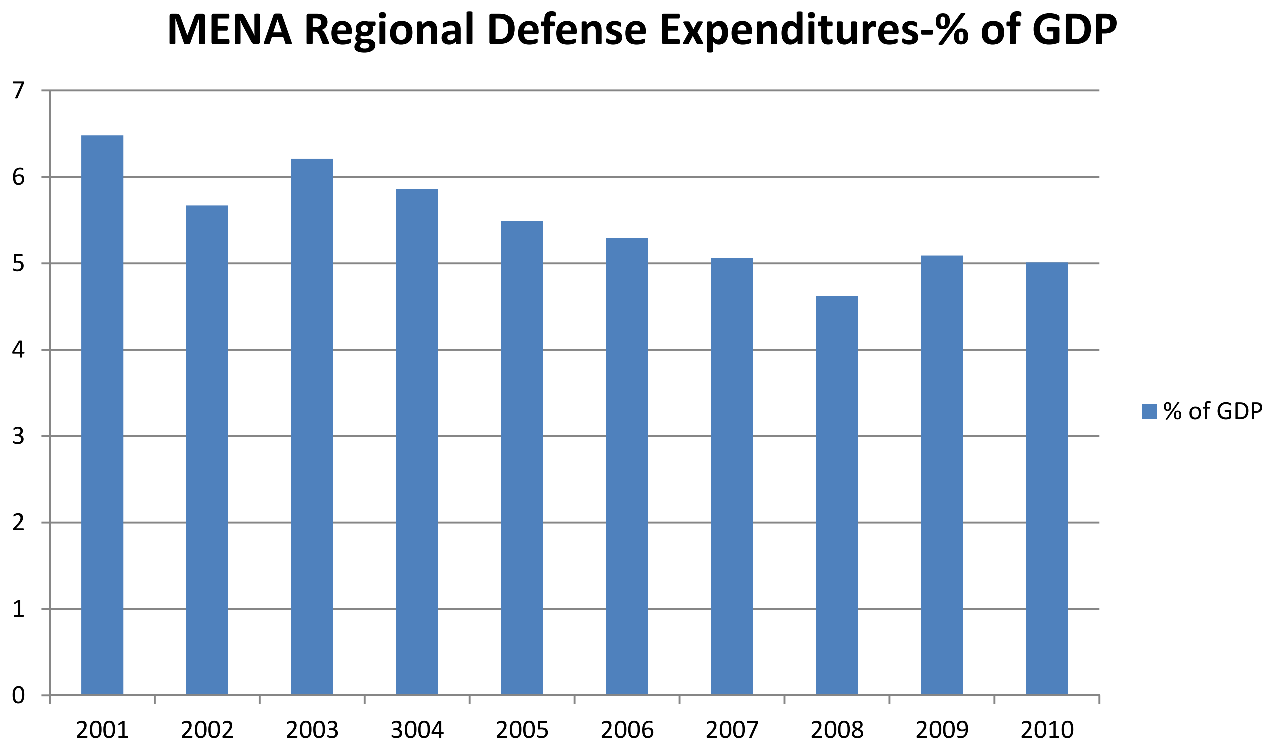
Excessively Large Paramilitary and National Security Forces-II



Source: IISS, *Military Balance 2012, Chapter Seven, "The Middle East and North Africa."*.

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Arab Development Report Security Measures

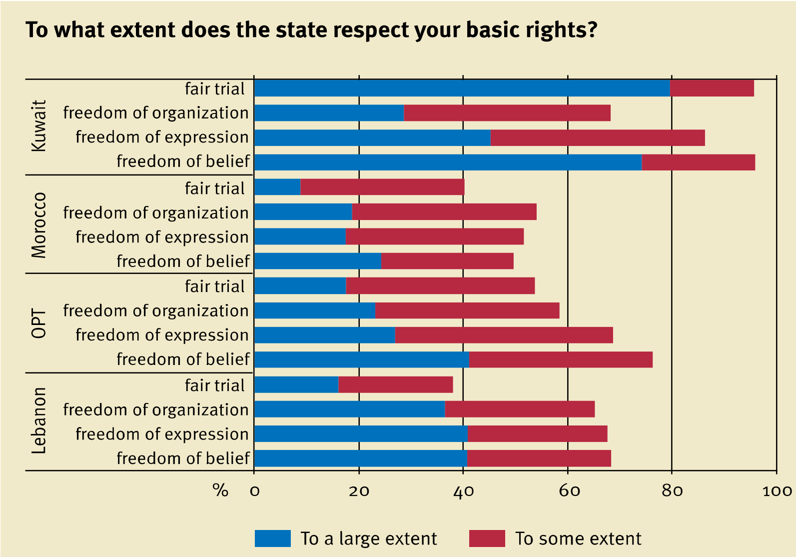


Table 3-1 Arab countries under a declared state of emergency in 2008

State	Year of declared state of emergency
OPT	2007
Sudan	2005 (in the Darfur region), extended to the whole country in May 2008
Iraq	2004
Algeria	1992
Egypt	1981
Syria	1963

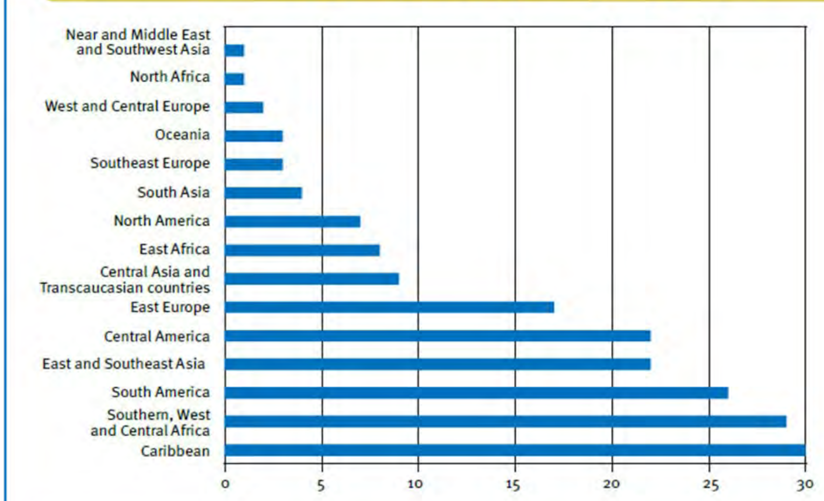
Source: AOHR 2008 (in Arabic).

Table 3-2 Political prisoners in 5 Arab states, 2005 and 2007

State	Number of political prisoners, 2005	Number of political prisoners, 2007
Iraq	26,000 (reduced to 14,000)	24,661
Egypt	10,000	--
Lebanon	--	5,870
OPT	9,000	11,000
Yemen	1,000	--

Source: AOHR 2008 (in Arabic).

Figure 3-1 Homicide rates (per 100,000 of the population), world regions, 2002



Source: UNODC 2005.

Source: Arab Development Report, 2009, pp. 60-63.