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# **ONLINE REAL-TIME DELPHI SURVEY FOR THE RESEARCH PROJECT MENARA**

## **COMPILATION OF ALL COMMENTS TO CLOSED AND OPEN QUESTIONS**

**Edgar Göll, André Uhl and Jakob Zwiers**



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### OVERVIEW

A number of 139 experts and researchers from different institutes and organizations were invited to participate at the Online Real-Time Delphi Survey (RTD) about possible and likely futures of the MENA region. The experts have been chosen due to their verifiable high expertise in specific areas and topics on the MENA region. All invitees received an e-mail with a short explanation, a link to the MENARA project website, and a personal link leading to the survey.

The experts were asked to answer questions and provide their opinions on twelve topics:

1. Social and cultural cleavages
2. Social unrest
3. Renewable energy in 2025
4. Internet in MENA region
5. Youth unemployment
6. Mass media in the MENA region
7. Urbanization
8. Gender equality
9. Military and security
10. State borders
11. Foreign influence
12. MENA and the EU

The survey was open for participation from Monday 2 July until Saturday 24 August 2018. Due to the advanced technical nature of this Real-Time Delphi Survey, the participants were able to see the responses of all the other experts (anonymously) at all times, and they were able to change and adjust their answers as often as they liked or found it to be necessary.

Seventy-one of the invited experts participated at the survey, meaning an very high response rate of more than 50 per cent could be reached. Additionally to the participants' answers a number of explanations, comments and remarks has been received.

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In this paper we publish<sup>2</sup> all the results of the RTD's closed questions and a brief summary of each topic.

We provide here the original answers, estimations and comments we received within our RTD-survey. We only edited few parts in order to ensure understanding and to make it impossible to track specific comments to specific experts. It has also to be underlined that comments on a specific country cannot necessarily be connected to citizens from that country, given the fact that more than 70 experts from dozens of countries have participated, including from other continents. We did not edit mistakes etc. in order to leave the original articulation and style intact.

## 1. SOCIAL AND CULTURAL CLEAVAGES

The basic problem in many countries in the region is an extreme unequal dissemination of wealth and opportunities to have a realistic perspective for making a decent living. Concerning the current US administration: the overall approach of President Trump is extremely nationalistic without caring about different interests, traditions, ambitions of the different countries. His unconditional support of Israel and Saudi Arabia will increase tensions and most people will suffer the consequences. In 2050 it can be expected that change in religious concepts might change in different speeds and sub-regions, and increase tensions.

The rise of socio-economic inequalities is a reality of middle eastern societies today. This trend will be the main factor destabilizing the societies because of the unequal distribution of wealth by dysfunctional States in the region.

These trends do not seem to be fading away. Ethnic, ideological and social cleavages will continue to be used by autocratic and fundamentalist currents as well as criminal groups and foreign entities.

The social and cultural cleavage during the next few decades will result in more poverty, crime, and unrest. Limitations of resources will lead to the decrease of jobs, food and, devastated conflicted between poor and wealthy.

In the near future most of the influence would be based on religion, and also relation with the US. But eventually this trend would fade away and the influence would be driven from economic conditions, whether poor or wealthy, meanwhile other superpower would also dominate the scene pushing the US influence far behind.

These divisions take different forms at different times but general repeat. That said, as I will say for all of the questions, I have no idea and would not attribute any actual probability to my choices.

For both years, I think that the religious divides will be more prominent as they are unresolved. The other divides will also be there in the backdrop, however, they seem to be more easily accepted.

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<sup>2</sup> Originally "for all MENARA-partners for the use within the project".

I suspect that some of the cleavages will be weaker by 2050 but not completely gone. Weaker: perhaps pro- and anti-US if the weakening of the US global role continues. Weaker also Arab/ non-Arab if the Muslim brother/Salafi cleavage within the Sunni world gets weaker. Depends also in Turkey's development.

Social disparities in the region (as elsewhere in the world) have been growing for two generations. Wealth is increasingly concentrated and entrenched, being passed on to younger members of powerful families. With this entrenched wealth comes ever more restricted access to power and justice. While the social cleavage is rarely referred to directly as a major political grievance, it under-girds many of the other cleavages you list above. Ethnic and religious tensions only become active because the us/them discourses of political actors find fertile ground to take root. When people feel secure about their means of livelihood, the future of their children, and are satisfied that rule of law applies to all, they tend to get along with their neighbors and "others" no matter who they are. When social inequality is not addressed (even discursively) generation after generation, it is very easy to inflame populations with hate for their neighbors and any group designated as "other".

In 2025 Sunni/Shiite cleavages would be at its upmost level, as it is foreseen that a war may arise between Saudi Arabia and Iran. On the long run (2050) these cleavages would be most probably less severe as some countries would be divided to Sunni and Shiite countries, like Iraq. By 2050 deals between these new divisions would be settled. In the long run (2050) tensions between Muslims and seculars would be more prominent as the trend of secularism in the region is growing, and at the same time Muslims may be more stringent. In 2025, the division of poor/ wealthy would be more due to due resources depletion. On the long run (2050) alternative resources would appear, such as other sources of energy and food. Besides, new planets may be occupied in 2050 which may open new opportunities for the poor.

Wealth, class and economic interest outweigh classic divisions.

Class divisions are the closest to universal socioeconomic realities that exist. I tend to think that these will be reoccurring problems throughout the next century, eventually reaching new levels of crisis.

Traditional cleavages (such as ethnic or sectarian) will always have relevance, but the politization [sic] of these cleavages has an expiration date. Because of the large population growth and limited ability of states in the region to respond to the demands of their respective populations, the gaps between the wealthy and poor will become far more apparent.

The cleavage between religious and secular (or fanatics and moderates) affects all major religions in the broader region. Also, the divide between poor and wealthy, both between and within countries will be a major factor for internal and regional stability, as well as for population movements.

I consider that issues of wealth distribution and the gap between poor and wealthy will grow so that the cleavages in the future will be even more acute. Concerning identity, I think the place of religion in the public sphere is still an unsolved debate in developed countries and thus will

probably be still at the center of debate in the future.

The identity politics will remain a powerful dividing line of regional politics at least for another decade. But once the identity politics will lose steam, then the question of socio-economic inequality will be more prevalent on the regional political agenda.

Religious/secular cleavages remain relevant today, but are fading away. I don't expect them to have as much relevance by 2050 as 2025. By 2050, Sunni/Shiite divides are likely to remain. The growing gap between the Sunni and Shiite populations is not likely to reverse course soon. Anti/Pro US sentiment is likely to grow over the ensuing years due to the Trump regime.

Sunni/Shiite cleavage is most likely to disappear as clove of the poor will be predominant cleavage.

Beneath the forth of contemporary events, the most enduring differences in the Middle East remain between the haves and have nots and the religious and non-religious. These are likely to resurface with time, eclipsing Sunni-Shia tensions and positive or negative views of the United States (whose role in the region will continue to shrink).

From my point of view, socioeconomic constraints will cause the greatest concern for all Arab societies. This will result in rifts between ruling elites and citizen, modify the traditional social contracts and lead to new forms of decision making circles and opposition. In this regard, the discussion about a pro-Western/pro-US stance of the respective Arab countries will shape the national narratives about change, prosperity and identity. The more the populist movements will gain significance (such as Trump), the more the Arab world will also fall in similar discussions. Thus, anti-Americanism will still continue to form one pillar of identity creation in times of economic crisis.

While in the short run sectarian dynamics are stronger, in the longer run they will subdue.

Religion, economic status, and race were main factors defining social and cultural cleavage in the previous century, and I expect them to be important in the future.

Globalisation and communication are the two biggest drivers of changes that will lead to reducing inherited differences, but the economy will not grow fast enough to avoid the schism between rich and poor. Urbanisation will make this issue more acute.

Should the current neoliberal framework still determine both global and local/domestic relations of all kinds (this is a pretty realistic assumption), poor/wealthy cleavage will not cease to be the cleavage at the origin of most socioeconomic events that will later on be determined by other conditions (climate, religion, regime type, geopolitics, etc.). The religious/secular divide will still be a powerful determinant in countries such as Israel (although the most important one will undoubtedly still be the one determined by ethnonationality) or, to a lesser extent, Iran and the Gulf. Both Arab/non-Arab and Sunni/Shiite cleavages are not cleavages per se, but particularisms utilized by regimes confronting each other for a more significant share of influence in the region.

I think the type of cleavages vary across countries. For example in Tunisia the cleavages are very likely to grow between religious and secular groups. While the new democratic environment is providing this space for free expression, the mechanisms and the culture that ensures building bridges between different voices in the country are missing. In Algeria, the cleavage is likely to grow between Arab and non-Arab according to indicators that we currently see, this is however is likely to be most felt by 2050 rather than by 2025. The Sunni/Shiite divide will very salient in Iraq, some countries of the Levant, and some of the Gulf countries.

In my opinion, in particular the poor/wealthy cleavage will increasingly become a cause for political and social tension. This is a horizontal issue, which causes conflict in all societies, regardless of ethnicity, geography or religion.

I think the coming years will show decline in the recent reasons for divide across the Arab world. Since the prevailing causes now are based on sectarian basis, in the few coming years will prove that economic status-based divide is the right cause for struggle in the Arab world. However, we will have also the issue of the state and religion as ongoing item on the agenda of Arab politics but in new forms.

I think socio-economic cleavages are the most basic and many of the other cleavages a result of unequal distribution and of instrumentalization of ethnic, religious etc. cleavages. Having said this, I would argue that the Sunni/Shia cleavage which is a function of geo-political rifts and elite instrumentalization etc. will remain important for one or two decades, as the elite propaganda and policies, the war in Syria etc. will have societal effects and it will take time to get back to peaceful co-existence. 2050: Poor/wealthy will remain key or become even more central as cleavages increase. I believe that secular and religious ways of life are likely to clash in the coming decades as Arab societies and states struggle to redefine (official) identities.

2025: In every country across the region, there is a growing disparity between rich and poor. In the Arab Spring “social justice” was a central component and even in non-Arab Spring protest movements such as in Lebanon and Jordan the central theme is that the many can’t afford basic necessities whilst the rich live ever more rarefied lives disconnected from the majority. As such I think it is these socio-economic issues that will drive further protest and potentially revolt over the short to medium term and thus be a main “fault-line” over the next 10 years. The new political factions being drawn up can be labelled in many ways. One of which (that is relevant to your criteria) is those backed by the USA [Saudi, UAE, Egypt, Israel] and those in opposition to that movement [Iran, Qatar, and growingly Turkey, Iraq and Syria] . Given that a battle for supremacy between these two wider factions looks likely to be the regional political headline over the next decade, the pro/anti US cleavage seemed one of the most appropriate. Although it should be mentioned the driving forces, and characteristics of these camps goes far deeper than that. 2050: The cleavage from non-Arab’s in Arab majority countries (Berber’s in North Africa, Kurds, Druze, Jews, Assyrians, etc.) is something that is becoming more distinguished by the day. Although it is something that will likely take some time and accompanying developments (i.e. socio-economic pressures) to really become accentuated. Eventually some form of reconciliation will have to take place between the pre-eminence that Arab majority’s give to their culture and peoples against the rights and needs of the non-Arab’s. There is also the role of the language of pan-Arabism which is heavily used to

describe and endow purpose to Arab states that is inherently exclusivist and will require updating lest it deepen the cleavage. The secular religious divide is one that is both dying and being rebirthed. The Sisi/Assad paradigm of a “secular” leader over a heavily religious populace is no longer as relevant as it used to be. However as Arab populations increasingly run out of reference points to describe both the collapse of their states and the resistance movements to the elite, religion is being used to fill that void. Thus it seems likely that the social malaise and economic collapse of MENA states will be painted as a failure of secularism which an Islamic renaissance will have to fix. One of the additional reasons I give this cleavage heightened importance is that we can see with jihadist and Salafist movements, that religion provides a socio-cultural bridge and a unifying cause that crosses geography, tribe, and class and re-draws battle lines accordingly. Thus it becomes increasingly apt for embattled groups to use to grow their numbers and advance their cause.

The only true division today and in the foreseeable [sic] future is the economic one – other divisions are political: can be exacerbated but don’t have to be.

Inequality (disparity between rich and poor) will continue prevailing due to the lack of effective policies to deal with this religions and sects will be more forceful, religious groups will confront each others and whoever is secular religious groups will be more involved in politics.

Class and religious identity are still important then.

The religious/ secular cleavages will be deepened in the region. This will be more in 2050. Also, the divide between poor and wealthy, will be a major factor for regional instability, as well as for population movements.

## 2. SOCIAL UNREST

Several trends will confront the region with old and new challenges. The major aspect is the perspectives for the young generation. At the same time the art of governance, of dealing with those challenges is of basic relevance for the outcome and consequences of those challenges.

1. Climate change, 2. Corruption, 3. Political repression, 4. Identity conflicts, 5. Bad governance.

Environmental issues, especially in arid poor regions like Egypt and North Africa, will contribute in augmenting youth unemployment and discontent. Authoritarian regimes will react with violence to their revolt, which in turn will lead to counter violence, which if often under the disguise of identity/religious conflicts. Authoritarianism, at least in the Arab world, works hand in hand with corruption and bad governance.

Interest in good quality environment is becoming a very strong demand. On the other hand unemployment is a major concern that would continue to be a priority for some time. Corruption and bad governance are currently major issues but would remain for the next 10 or 15 years before they are well controlled and eliminated.

War and development failure generate this kind of continuity.

Again all the elements listed could lead to social unrest, however, identity conflicts in regions with religious divides like Bahrain, Lebanon, Syria will be more likely to experience social unrest. Territorial disputes are a major postcolonial offspring threatening social peace in the entire MENA. Lastly, corruption, bad governance, and political repression are the hallmark of authoritarian regimes and crony capitalism particularly in so-called “stable” regimes of the region, such as Saudi Arabia, Jordan, and Morocco.

Summer 2018 is the right moment to see the effect of environmental degradation, including poor water management. Related to bad governance. I also cannot see any serious efforts to tackle youth unemployment – again bad governance... Only a miracle could change something until 2025.

Environmental degradation is already affecting social cohesion and political stability (part of the Syrian conflict, the central Sahel countries, Nigeria, etc.). Though the latter are not technically in MENA, the repercussions of social trauma easily cross the borders of our conceptually distinct “world regions.” Environmental degradation impacts the regions within countries to varying degrees, exacerbating regional/ethnic disparities, stimulates rural-urban migration, particularly to the largest cities of a given country, and emigration. When people can feed their families, even barely, they are able to put up with almost any level of mismanagement, corruption and repression. When they are not, they will act, often in desperation. Youth unemployment is particularly destabilizing at every scale: within families, for the internal politics of a country, and for international migration flows. Young people (men especially, in a patriarchal society) who are unable to gain independence from their parents (fathers), who are not able to leave the “nest,” who cannot marry and establish themselves as full-fledged members of society, become frustrated and socially isolated – and prone to all manner of radical/populist discourse. In countries with young populations (“children” become “young adults” within a decade, and a decade later they are in their 30s – and still stuck at home with no perspective of improving life conditions), disaffected youth with lots of time and education at their disposal and little to lose can be powerful agents of social mobilization.

Environmental degradation and its impact on resources provision would be a major element of conflict in the region. Water wars may arise, as most of the countries in the region are under water security level. Taking into consideration the trend in population growth and urbanization water stress in 2025 would be more severe. This may lead to social stress, as water and food process may be much more than what the poor can afford. In 2025 [2050?!] robots would be prevailing in the region, leading to rising youth employment, which may lead to social unrest, as youth may lead interceptions against governments and wealthy people.

Bad governance is very comprehensive. It implies and leads to corruption, territorial disparities, youth unemployment, etc.

I believe that the basic problems are environmental degradation and bad governance. These two fundamentally fuels the other problems mentioned above.

Environmental degradation will exacerbate all other problems in the short, medium, and long terms. It will sneak up on governments and the response, if it comes at all, will probably come too late for many. In the nearer future, youth unemployment – especially as “youth” become young adults – will be a problem in the shorter term.

Environmental degradation is a serious problem for the whole of MENA region. Youth unemployment is going to get a lot worse in countries such as Egypt. It also exists in Algeria and Tunisia, but these countries do not have the size and importance of Egypt for regional and transregional stability. The same pattern follows my answer about bad governance, even though I would add “no governance”, since there are at least two failed states in the region, aka Syria and Libya (and Iraq not far from it).

As with my previous answer, impressive population growth coupled with an inability to create jobs will be the largest challenge to current regimes region-wide.

All the above factors will influence social unrest. Youth unemployment will be extremely relevant because of the youth bulge in many societies in the MENA region. A significant number of young people without jobs and without hope for the future will substantially increase the potential for social unrest. For the same reasons, bad governance will increase discontent among the whole population.

I think that youth unemployment will still be one of the main relevant deficits of the region in 2025 since it will be very difficult to curb the current trend in such a short period. Territorial disparities as well as identity conflict will still be on the rise taking into account current trends and political repression will still be an issue that will probably bounce back in a short term period.

Environmental degradation, youth unemployment, political repression, bad governance and identity politics (ethnic, sectarian and political) are the elements and challenges that faces almost all the countries across the MENA region. The severity of some of this element such as environmental degradation and youth unemployment will be further felt down the road. The nature of each countries’ answers to these challenges will reveal a great deal about whether these countries will experience further political instability and social unrest.

Virtually all of these factors are relevant today and will continue to be. Regarding the environment, access to water will diminish and will likely lead to serious conflict in the region. The political issues (governance, repression, corruption) are on a downward trajectory.

I am convinced as in the world Economic disparity and the bad management of the Climate Change impact on social economic life is already and will be most important source of social problems.

Many governments in the region have reverted to the repressive practices that helped usher in the Arab Spring. Doubling down on repression will only exacerbate the problems of poor governance in the region – of governments unable to meet the basic needs of their citizens. Frustrated citizens will find ways to push back against corrupt, repressive states that govern poorly.

Social frustration, the youth bulge, lacking job opportunities for the Arab youth, discontent about patronage networks, clientelism and corruption will still continue and further increase by 2025. This will widen the gap between underprivileged population and ruling elites if the respective governments are unwilling to implement more economic diversification, political freedom and administrative transparency. Thus, frustration will increase followed by harsh repression resulting in a dramatic identity crisis about the mismatch between leadership and population. Probably, those discrepancies will become more significant in Arab Gulf monarchies than in Arab countries that have been already affected by the so-called “Arab Spring”. At the moment, diversification, modernization and liberalization is underway in the Gulf countries but it remains to be seen whether this transition will be successfully led to a coherent identity based on common values rather than on oil welfare.

The Arab region is moving towards technology based economy, while it is suffering from bad governance, corruption, marginalization of youth (politically and economically) even though they are representing roughly third of the population in the Arab world, and weak national identities. Technology usually raises the expectations of the youth and other social groups in societies, and as there is no channel to express these expectations, or to fulfill them, social unrest is most probably to take place in various forms.

2025 is a stone throw away, so current dynamics will shape the scene. Shorter term factors, like bad governance (which includes corruption and repression), and youth unemployment, will probably fuel unrest.

As long as the bulk of the different populations in the region keep perceiving there is no actual state that pays attention to their demands and guarantees a minimum share of rights (including the foundations of a welfare state), citizens will keep feeling disgruntled and from time to time take to the streets – although regularity and probability would in that regard depend indeed on political repression. The perception of “being abandoned” by the state will undoubtedly worsen when corruption and bad governance are pervasive (almost always the case). The youth bulge and youth unemployment stand as the biggest “threat” to MENA countries today – but also the biggest opportunity if handled right (most probably, with non-negligible help from external allies). KSA will be key in that regard Environmental degradation does not cause social unrest per se – it’s the malign management by the authorities and the socioeconomic consequences of the latter that do. We should be careful about that.

Youth unemployment is a ticking bomb in the MENA region. While the number of university graduates is growing, there are no clear positive signs of any progress to be made by 2025 on finding solutions for this growing population. The unemployed will be increasingly frustrated, angry, and disappointed. What will fuel their frustration is the widely perceived bad governance, corruption, and regional disparities. Political repression could be responsible for social unrest also, but regarding the worsening conditions and people’s high demands for better economic conditions, political freedoms are not likely to be a cause for unrest.

I believe that many of these are mutually reinforcing. However, youth unemployment seems to be the most explosive area in the next couple of years.

I believe that the environmental degradation is likely to be linked with the ongoing economic decline of the Arab world as a whole and separately. For now, none of the Arab states has paid any attention to the climate change and its related social and political issues. That means it will be more pressing issue in the near future. It goes without saying that climate change and its repercussions have great impact on the employment issues.

I would argue that socio-economic imbalances as well as state service output and perception of low Repression are key for preventing unrest. As imbalances are easily instrumentalized in fragmented societies, identity conflicts are very likely as well.

There is a case to be made for all of these, but I highlighted those (still many!) likely to have a big impact. (1) Technology has always been used to breach the traditional internal security monitoring tactics and create “safe spaces” for conversations amongst protest or rebellious groups. Recently the pendulum has swung the other way with the oppressive regimes of the region obtaining ever more sophisticated equipment with which to monitor activity. As technology becomes more decentralised, internet uptake strengthens, and “stealth” technologies like VPN’s and onion networks become more available and easier to use it seems likely that technology will increasingly be the battle ground between the regime and the people, and a successful application of technology will be necessary to rally, organise and give voice to large numbers of people. (2) Climate change is warming up an already arid region, the combination of this with very poor waste management practices and Europe-centric agricultural policies (e.g. growing crops for Europe not suitable to the local climate such as tomatoes which take a lot of water). Is slowly leading to a failure of agricultural productivity and the ability to provide water. As this worsens it is likely to lead to considerable unrest and migration. (3) Ever burgeoning youth unemployment was a driver for the Arab Spring and is something that has not been resolved satisfactory. This alongside the exclusion of youth from politics will increasingly drive the youth to make their presence felt and to advance their priorities. (4) Corruption (which comes alongside Bad governance) is leading to a failure of the state to allocate resources, and oversee institutions that can provide economic growth, access to the private sector, or improvements in the quality of life for its citizenry. This plays into the social-justice aspect that drove the Arab Spring, and is an increasing source of discontent in Arab Spring and other MENA states which will need reconciliation before it results in revolution.

These are true for the whole region, although corruption is an element of bad governance: I see it as one. Identity conflicts can be part of future social unrest if by them you mean “class conflict”.

Demographic developments are leading to high share of youth in overall population – youth unemployment will continue to be a problem as labour markets are not flexible and demand is insufficient. Territorial disparities is a problem and large investments are needed to solve it. By 2025 this will not be done. Bad governance will continue till 2025. Marginal Improvements are not enough.

Identity and good governance will be important in 2025.

In 2025 the region will be experiencing good governance and corruption will be less, as the region is on the path of reforming. Environmental degradation will be affecting the social unrest of the region, as climate change impacts will be much more felt, causing internal and external migration. As technology will be imbedded in many sectors, robotics will be replacing some jobs, causing higher unemployment rates, especially for the youth, causing social unrest.

### 3. RENEWABLE ENERGY IN 2025

To invest in RE has as basic preconditions the knowledge/expertise and financial capacities for investing. Only few countries seem to have these conditions. The challenge is to support the RE-trend via EU etc.

It's about economic development I guess.

Many countries have already started their plans for renewable energy with special reference to Morocco, and Egypt.

Ability to invest will drive change in energy mix.

Very likely everywhere. I am not knowledgeable of Iran's status.

Morocco has already greatly invested in renewable energy production (wind & solar). It has the adopted policies to this effect and benefits from the foreign investment (mainly EU) necessary to carry them out. Other non-oil producing countries with access to such capital (Turkey, Israel) are also likely to make good headway in this regard. The OPEC countries, despite the rhetoric of planning for a post-oil future, have little immediate incentive to change their energy supply system. The interests of the political elites are entirely bound to production and export of oil/natural gas.

It is the Gulf and Israel, and also Turkey who can financially and politically afford such large-scale investment.

In such a short time frame, it is difficult to imagine most of these countries moving toward renewable energy.

The Maghreb (primarily with Morocco) have already had some investments at solar farms in their vast deserts and it is not impossible to imagine future joint ventures with the EU especially at creating renewable energy initiatives in the region. The Mashreq is the least likely as present states have struggled with providing even basic services to citizens and many energy infrastructure projects are desperately in need of repair (some were constructed by Soviet engineers and have not been properly maintained since then). Egypt is in a similar situation to the Mashreq in state inability and differing priorities. Iran, with existing dams, nuclear power plant projects and a need to reduce subsidies for domestic natural gas is very likely to increase its natural renewable energy production. The Gulf, out of necessity for continuing exports and diminishing ground water reserves, is in a very good position to invest in renewable energy. In addition to this, they have the best resources in the region to invest. Turkey is a bit of wild-card. On paper, it makes both sense for

the state to become less reliant on energy imports and it has a greatly industrialised economy that could be put to use to increase its renewable energy contribution. However, massive corruption of the energy sector (including President Erdogan's son-in-law Albayrak's energy investments complicating matters).

Gulf countries will search for an alternative source of energy as a must for their survival and sustainability. Maghreb countries are already showing an increased interest in renewable energies and they will probably expand their capacities in the near future.

I don't see this happening anywhere.

The global economy is swiftly moving away from oil. Within the next decade, we are likely to see a profound and often disruptive transition toward more renewable sources of energy, though oil will remain an important commodity for some time. The Middle East is no exception, even if this transition takes longer than in many other regions.

If we take the ongoing diversification processes in the Gulf countries into consideration, renewable energy is planned to be tremendously fostered. Due to the fact that fossile [sic] energy resources are running out, all Gulf governments have acknowledged to diversify their oil-relying economics away from such fossile [sic] fuels. However, those plans have already failed in the past due to lacking legal frameworks, still existing subsidies for oil and gas, and inefficient administrative structures. These challenges need to be solved to attract foreign investors, create a national R&D infrastructure and find solutions that are affordable and competitive for the national consumers on the one hand, and enough attractive for investors to seek for return of investments.

While there is definitely a trend toward greater use of renewables region-wide, the extent to which particular countries/regions will tap into it will depend on the technological capacity and other economic indicators.

All of these regions have plans to invest more in renewable energy by 2030, in order to achieve energy security.

Again, 2025 is very close, so unless strategies are in place now, you wont [sic] see much difference.

Keep an eye on the price of oil and gas plus newest technologies!

I believe this is determined by necessity and capacity, which, in combination, I see most in the Gulf region and Israel.

I think that the Maghreb countries plus Egypt and before them Israel have shown great progress on the dependence on the renewable energy.

The question is not well posed. First of all, it is not 100 per cent clear whether you refer to generation (KWh) or capacity (KW). Big difference: I interpreted it as generation, but ambiguity probably undermines your results entirely. Secondly, a doubling from current level of zero or close

to zero is not a significant boost.

The positive assessment re. Maghreb stems from Morocco's renewable policies and major output, while Tunisia and Algeria most likely will make only little progress.

I do not know enough about the conditions of Iran and Israel to give informed answers. The Maghreb is already seeing a big growth in renewable energies with Morocco's solar drive, and Libya's use of solar in order to combat its increasingly failing electrical system. As Tunisia seeks to cut expensive imports of fuels, and Algeria seeks to maximise oil exports given their decreasing value, it's rather likely that they will soon follow suit. As fuels become more expensive to import countries like Jordan and Lebanon are increasingly considering renewables although it's difficult for them to manage the big financial and logistical outlay needed to put the infrastructure in place to allow for this switch. Syria and Palestine may see increases in renewables as electricity provision becomes more decentralised due to political problems. The Gulf region is using their large financial reserves and ability to attract foreign expertise to start this switch already, seemingly driven by the need to maximise exports of hydrocarbons rather than use them internally. Turkey's economic problems make it seemingly difficult for them to finance such a large outlay, however there is clear intent from Erdogan's government to consider renewables as part of their modernisation and reform programme.

There several ongoing projects in Morocco for the other oil exporting countries it depends on their positions in the geopolitical game in oil and gaz. But 2025 is too soon to see fundamental changes in the energy mix towards renewables.

Iran is investing on renewable, so do Turkey and Israel.

Mega renewable energy projects are projected to expand in the region, especially in Egypt, Morocco, and the GCC countries. This will be driven by the higher population growth rate, demanding more energy. The cost of RE will be less and the know-how on RE technology will be in the region. The region will be exporting RE to Europe as projected.

#### 4. INTERNET IN THE MENA REGION

In countries like Israel, UAE and Saudi Arabia the dissemination of ICT and internet is advanced, but not so much in many other countries of the MENA-region. In the short-term this might change in some countries. But the use of the internet is very much limited to personal use, whereas business models or applications within public administration are rather to be expected in the long run (i.e. 2050) because it needs an education system in general as well as a certain openness for innovation among decision makers and users, which seems to be a generational change of cultures.

Push towards democratization and secularization, but also new opportunities for polarization and radicalization.

I do not see a relation between the use of Internet and the development of knowledge.

Internet will perhaps eradicate illiteracy in the Arab world, but the proportions of fake news pages and channels will corrupt the amount of knowledge Arabs will receive. Therefore, and as long as populist and conspiracy theory propaganda is not efficiently confronted – not only in the Arab region but globally – I am not optimistic about an improvement in economy and society. Still, through internet there is space to transform the hearts and minds of Arabs, encourage the bright minds to excel and fight extremism and bigotry.

Libya is not a complicated bureaucrat society, the socioeconomic [development] will be affected positively.

2025: 60 per cent of the region will be online, facilitating online activism, connection of like-minded people and unrest. 2050: Only then will governments have seized the opportunity that the internet offers in terms of economic development.

Internet can: (1) create new jobs through online sales and promotion hence improving job and economic conditions specially in countries suffering unemployment such as Egypt, Morocco; (2) improve education conditions and raise awareness in most of the countries.

The meaning of knowledge societies and modernization are very unclear. No way to answer this question.

Israel will to me lead the region in terms of hosting the MENA Silicon Valley. Morocco can also develop [into] a ICT hub. This could help many economies and societies of the region decrease youth unemployment and develop the services sector.

At the moment the tendency is to restrict internet access, even in countries with fairly free elections like Iraq. If this tendency continues, development in the MENA region will suffer. We see restriction everywhere. This will be a hindrance for an integration into global economies for all concerned countries. Therefore: not much development until 2025.

In Morocco internet connectivity and cellphone coverage are very good already. I believe they will keep pace with developments globally. Cellphone use especially (most people get internet access through their phones) has revolutionized family life and business practices over the past two decades. This, however, does not necessarily correlate to building knowledge societies or modernization. Family life: internet and cellphones have put tools in the hands of youth (even children) and women, and has undermined the ability of fathers and husbands to monopolize communications within the household. Young people are able to socialize and flirt much more easily. Women, even locked in the house, are no longer so easily isolated. Business practices: for small businesses especially, internet and cellphones have greatly reduced the cost and bottlenecks of the traditional communications systems/networks, allowing a “leapfrogging”.

It will affect social and political mobilization, but will not influence policy making because of disconnection between knowledge production and decision-making in Arab governments.

Internet access and use will: promote more transparency; democratize access to knowledge and trainings; break down isolation; facilitate exchanges; increase pressures for a better governance. The countries: Turkey, Iran.

Internet should be investigated by the cultural ways of use. Wide penetration of the internet is not necessarily followed by modernisation and the development of knowledge societies.

Turkey, Iran, and Israel are making the greatest advancement but the conservative kingdoms are more fearful of the consequences of access to the internet.

There is a small minority who already make tremendous use of the internet for “the development of knowledge”, but I tend to be rather pessimistic in general about how it is used in public and private education. It has already connected people and has certainly had the effect of making the world of people who have very little aware of the world of those who have a lot. There are some fantastic results of this awareness, such as artist collectives or human rights groups but frankly I cannot see big economic or social changes in the way of “development”. Capitalist projects will be born and die via the internet and “modernization” may come in the form of online ordering services but the internet will certainly not build infrastructures or make the vast majority of poor people’s lives any better.

As the recent past has shown the rise and spread of internet as a tool of dissemination of ideas, has contributed both towards modernization, but also fanaticism [sic] and backwardness. So in my point of view it will continue to function in that direction. Positive influencers in the MENA region are not as many and as influential as westerners think. One good example is the case of Turkey, where internet has been substantially regulated to a point that no circulation of free ideas is allowed.

I would first like to say that the internet has already has massive influence on both society and the lifestyle of the MENA region. Examples of this are plenty, but the Arab Spring, Salafist mobilization online and dissident organisation online are just a few. 2025: Knowledge of internet services leads to MENA online entrepreneurs, similar to what has happened in other regions but at a slower pace. The governments of the region are likely to invest in ISP oversights to limit internet freedoms. 2050: Unknown.

Increased access to the Internet will allow large segments of the population in the MENA region to have an increased understanding of regional and global developments. Some of them may benefit in a more concrete way in the context of their professional activities. Success stories in the neighborhood will increase the pressure for changes at home. At the same time, they will have to deal with constraints on information put in place by their governments and with fake news (as all of us).

Internet will foster mainly the business sector. it provides innovative mechanisms for individual entrepreneurship and particularly that coming from women in the region. it will be in 2025. In 2050 it will probably change the pattern of labor in most automated ways of producing. As a means of expression Internet will be an uncontrollable source of artistic expressions that will transcend

all potential censorship mechanisms. The breaking of rules in Internet (be it social, religious or political rules) will probably make MENA societies more proficient in demanding accountability and thus potential for political unrest remains high.

There will be two contradictory trends as regards the use of internet in the Arab world, particularly in Gulf and more authoritarian states such as Egypt. On the one hand, the increased access to internet create opportunity for a virtual public sphere – the actual public sphere is almost non-existent in these countries – where people can engage in political and public debates. On the other hand, the authoritarian government will invest more in the control of these virtual spaces. But the overall balance is likely to be in favor of people and public. The existence of a virtual public sphere is one of the factors that is likely to render the new form of authoritarianism in Middle East more fragile down the road in 2025. Two types of answers are likely to be offered. Gulf countries are likely to go for authoritarian adjustment or updating, whereas the poorer authoritarian regimes, such as Egypt, are likely to increase their level of repressiveness.

GCC countries are more likely to reap the benefit of ICT infrastructure.

The internet will continue to be a tool that connects people, particularly in the more open countries of the region (Tunisia, Morocco, Lebanon, Jordan). But, it will also be a tool of repression in places like Egypt. As activists grow more savvy, so will Arab leaders, devising tools to shut down the internet or disrupt communication.

Internet provides access to international developments and allow the actors of the region to compare their conditions with their peers all around the globe therefore create more demanding economy and society. However, unfortunately I don't see in the region any use of IT technology neither internet for innovation and economic boost.

Consumers in the Arab world have been avid adopters of the Internet, mobile phones, and social media. (The Saudis, for instance, are among the most prolific users of Facebook and YouTube.) This has transformed attitudes in many societies, as citizens can better compare their lot with those in other societies. Whether this will lead to greater knowledge and enlightenment or people retreating in anger into their particular communal bubble remains to be seen, as is true elsewhere in the world. So too remains open the question of whether governments will ultimately control the Internet or be controlled by it.

Gulf countries: Internet access, social media usage and online engagement are still tremendously changing the public sphere, the political debate and the discussion about social challenges. All Gulf societies are rather young, tech-savvy, internet-affine and well-educated. Therefore, the significance of internet will further increase. This will result in better e-governance, a smarter and more efficient start-up scene, and a rising online discussion about critical issues such as unemployment, identity and social welfare. By 2025, the Gulf governments will be able to partly control those discussions in order to avoid political online opposition by creating fake accounts, bots, trolls and counter-narratives. However, the leadership's abilities to fully control internet discussions will diminish by 2050 and could result in further demands for political reform, more political freedom and even online protest that will be transferred to the streets.

The use of internet can facilitate certain education and employment opportunities that were not available beforehand. This can assist in somewhat elevating the big problems related to youth unemployment. The internet also improves connectivity in the MENA region and beyond.

By 2025, in Iran, Iraq and Levant, greater access to internet will continue to increase demands for political participation, which will be a direct outcome of greater awareness about local and regional political developments. Broader use of internet is also highly likely to trigger population movements, putting demographic pressures in the form of outward migration.

In 2025, it will lead to knowledge economy that is likely not to be well legalized and regulated. In 2050, it will lead to knowledge economy that is likely not to be well legalized and regulated.

In the longer term, by 2050, in countries like Egypt, Sudan, Morocco, Yemen, Saudi Arabia: Internet is overriding the constraints of illiteracy and involving wider groups of society in processes of empowerment, enhanced skills, involvement in politics and social affairs. This is particularly relevant in the case of women and youth. The old ways of governance will not work, so more transparency, more participation, will be needed. At the same time, communication will empower opposition and make it more difficult to govern or maintain stability. Communication technology also tends to help forming smaller social groups isolated from society. This may increase problems of integration. in the shorter term, by 2025: expect rapid expansion of access.

How much more can the internet penetrate the region? If anything, that would translate into deeper and more pervasive individualism when it comes to an already disenfranchised youth, barring a few start-ups here and there (most of them, particularly in the Gulf, encouraged by the regime and against a background of privilege). (Public) education systems in the region are not ready to take advantage of ICTs.

The growing use of the internet is likely to have a positive impact on the economy, at least speaking of Tunisia. There are some attempts in the country to enhance the digital economy. This will provide new job opportunities in future for people working in e-commerce and telecommunications for example. Of course remaining legal issues and challenges like Tunisia's rejected application for PayPal will be an obstacle to fully unlock the potential of the digital economy by 2025. But we should expect to see notable progress in this by 2050 as there are some concrete signs of gradual progress in this direction.

One area I see is the potential for EU industries to outsource services components to Maghreb countries in the coming years, in particular to Tunisia.

I am not expert in this area.

What are Arab knowledge societies? What is modernisation? Another badly formulated question.

2025: Will increase mobilisation of protestors, lead to campaigns that are difficult to control, spark unpredicted unrest. 2050: Governments will be able to control social media and use for their

interests and have experience in pre-empting social media led dynamics. Also fragmentation of social media platforms may be so large that effects less large. But here unsure of my assessment.

In Palestine and other countries with poor natural resources but high level of education there are possibilities of a development of a labour market with opening to more private sector companies offering online services.

Increased use of the internet is leading to increased educational opportunities e.g. increasing numbers in Libya are doing online university programmes at western universities. This is leading to a greater interest in technology based entrepreneurship. This rise can be witnessed in places like Gaza, Palestine and Benghazi, Libya where due to the constant warfare making traditional business difficult, and limiting opportunities for gainful pastimes many are turning to software based entrepreneurship and other activities to compensate. In Tunisia, Libya, and Jordan there has been an uptake in the use of online spaces (from Facebook to custom websites) where CSO's and groups with common political interests convene and discuss issues. This will ultimately help to create a more mature socio-political environment although it also helps opposition groups to dictatorships organise and plan, thus also making further unrest likely.

Throughout the region internet is providing public sphere that otherwise would not be existent: this is particularly true for the Gulf and Egypt in both time horizons. I do not see a use of the internet that would foster modernization of the state other than the development of tools to control the population: throughout the region.

The internet is likely to democratize education, and allow citizens to sidestep limitations on their freedom of speech. It is also likely to reduce the ability of authoritarian regimes to control access to information for the citizens. These trends have already shaped relations in the Middle East, most clearly with the Arab uprisings in 2011. They are likely to persist and gather force in the near to medium term future.

internet maybe conducive or disruptive. It depends on how it is used and regulated.

It contributes, in some countries in the region, to the implement of some western companies (delocalized from the Europe to Maghreb for example) in the field of services. Development and modernization economy and fight against bureaucracy which is hindering the development. Development of a kind of "citizenship culture" in the region's societies. (Maghreb and Machreq [sic]) The social networks are no the preferred means for social mobilization against repression, corruption and the high prices, as the case, in Algeria, Morocco, Egypt, etc.

Internet will broaden the extent of the knowledge but not its depth.

Internet will be much more accessed in the region in 2025, especially be remoted areas. This will enable the marginalized groups to be empowered. The internet will play a role in marketing the goods of these groups and creating clusters of related businesses. Egypt will experience a shift in the access to internet as the Egyptian government is targeting the expansion of internet access in 2020. Morocco, Jordan and the GCC countries will also experience expansion of internet access

as well.

Access to the internet will foster civil society and demand for more participation on behalf of various groups but this may also lead to clashes and more unrest.

## 5. YOUTH UNEMPLOYMENT

The political and economic capacities as well as trends concerning socioeconomic development and export-potentials in different markets seem only for a few countries favourable with regards to youth unemployment.

Egypt's expanding demography will make it impossible for any government, dictatorial or democratic, to tackle the issue of unemployment.

Serious efforts are already focused to reduce youth unemployment in many of the countries in the region.

High supply of young labor and low capacity to invest. Often very low entrepreneurial potential. Result is slow change for youth.

These assessments depend on my perception of growth of those economies.

I cannot see much hope for such a significant reduction, except for the Gulf countries, if they substitute foreign workforce with domestic personnel.

Countries that have already greatly reduced their birth/fertility rates (Morocco, Tunisia, Turkey) will likely reap the dividends of this in the next few decades, as proportionally fewer new young people arrive on the job market. Countries whose economies are sclerotically "frozen" by the vested interest of their ruling elites (Egypt, the Gulf) are not likely to attract the domestic and foreign investments necessary to create the needed jobs. The situation in Iran may depend on its continued isolation/sanctions regime.

Some countries already proceeded in reducing youth unemployment. For some less fortunate ones the ongoing decline of birthrates is one potential way to reduce such unemployment in the long term.

The only chance of this would be a rapid decrease in population growth. I see absolutely no long term plan for addressing unemployment in any of these countries (and do not know enough about the last three countries to say anything).

Maghreb's economy and planning for it is still heavily relied on hydrocarbon (the case of Algeria) or money transfers. No modernization in sight. Mashreq is a region of semi-failed states. Don't know how can the economies there recover, before geopolitics calm down. The Gulf countries have the ability to invest money on re-orientation. Size and structure favor developments. Iran is a big question mark for me. But I think that in long term, either with the current or another status, there

could be positive developments. Turkey, despite its inherent problems, has invested in diverting a big part of the invested capital into technology. Israel already has this very solid basis.

The Israeli economy appears to be growing at a fast pace. Iran and – even more – Turkey have the potential – although there are no guarantees as many things can go wrong – to grow over the next three decades. The Gulf countries could – at least in theory – achieve decent economic progress – again many ifs –. Expectations are much more modest for countries in the Maghreb and the Mashreq.

Mashreq countries embedded in conflicts will have more difficulties in decreasing youth unemployment, which will remain high for the decades to come. Conversely, countries such as Turkey or Israel will be able to increase employability and thus improve in their levels of unemployment.

Fertility rates and economic growth trajectories of these countries were important determinants in my assessment.

The Arab Spring taught the region that they cannot ignore youth unemployment. While I do not expect a massive reduction by 2025, by 2050 many of the countries and regions should be able to devise economic policies and attract investment in a way that could help reduce youth unemployment dramatically.

Economists don't fully know how to generate full employment in the region. The region's contemporary debates have been largely about politics and religion rather than economics, but many socialist (and authoritarian) ideas prevail about how to run an economy. The region would undoubtedly be better served if governments reduced drastically the level of regulation and liberalized substantially their economies, allowing more young people to start new businesses and more entrepreneurs to be creative. But governments are unlikely to adopt such measures nor is it clear that they would have the immediate impact on employment levels desired.

Most of the Gulf governments are still be able to provide their people with welfare alimentation. This slows down the grade of social frustration. On the other hand, the reliance on foreign labor force needs to be reduced in order to create jobs for nationals. If the private sector will be strengthened, income increased and legal framework improved, the mentality of Gulf young people to prefer working in the public sector might be decline. We are still witnessing a gradual change in working mentality in those countries: Young people are more looking for jobs in the private sector than the older generations. They have to compete with other well-educated nationals about jobs. This is especially due for women. I am convinced that this process will continue.

I don't think we have enough data to give any sort of accurate answer to that question.

Maghreb countries are supporting these days the idea of startups and MSE for youth, and they are developing the needed legislation and financial tools to encourage youth to create their own job opportunities. In Egypt, this development is slow, thus I expect the Maghreb to be faster than Egypt in reducing employment rate through the MSE. The type of expectations among the youth in the

Gulf countries, as well as the extent to which they are willing to take the risk of creating their own job opportunities apart from the government, could result in the continuation of high employment rate in these countries in the coming 30 years.

Again, the growth rate and possibilities for integration with neighboring countries will shape this projection. Countries with a youth bulge will face a more difficult time, as they continue with high population growth and average growth rates (say 5 or 6 per cent).

Taking into account the current and foreseen numbers, no way this is going to happen in either country (not even Israel, where social unrest keeps growing in that regard and might lead to unprecedented cross-cutting cleavages).

I think there will be different cases for countries belonging to the same region. There are important differences for example between Gulf countries in terms of the rates of youth unemployment. This is not a real concern in the UAE while it is a growing issue in KSA. In general for most of other MENA countries dealing with this challenge now, it is hard to see a big change by 2025. The current environment does not help counter this challenge.

Extremely difficult to say, even within Europe, but let's stay positive.

Speculative answers.

One simply sees no progress in taking effective steps to reabsorb youth unemployment. Repression is the only policy being implemented.

Demography will play a role in reducing youth unemployment in the long term. Choices of structural reform of the economy will play out in the long term. Israel, Turkey and the Gulf states have more advanced economies, are more embedded in global economy. Hence, possibilities for improvement short term.

With the exception of Turkey which has a more developed private sector, and a more competent government and thus more macro-economic options available to it, it is extremely unlikely that any Arab country will be able to effectively reduce youth unemployment without a revolutionary political approach. Entrenched practices such as economic elitism and clientelism and the centralisation of state resources makes effective macroeconomic reform nigh on impossible. The inflexibility of existing regimes and governance systems is a big factor in the regions increasing unrest and tendency towards violent attempts at revolution.

Some countries do not suffer high youth unemployment rates the others may be able to reduce youth unemployment rates if they act on the supply and demand of their labor markets.

The Maghreb countries will be able to reduce the unemployment rate at higher rate than the Mashreq countries. The political instability in the Mashreq will limit the efforts of the governments to reduce unemployment rates.

## 6. MASS MEDIA IN THE MENA REGION

The culture of authoritarian rule and control is still dominant in most countries. Depending on the acute challenges and even upcoming crises the mode of governance will be critical in relation to the development and quality of mass media. At the same time, external influences and pressure will certainly lead to a stagnant or regressive development. The degree of education of people will be a decisive feature for the diversity, being political, religious or ethnical. Again, the forms will very much depend on the quality of governance and socioeconomic development in each country.

Do not have enough knowledge to answer.

Mass media in the region develop towards a less flexible model. They will follow the guidelines and stick to the official narrative promoted by the state.

Quality and independence wise, between now and 2025, the prospect is gloomy apart from Tunisia and Lebanon where targeted funding can create professional and independent media outlets. In the rest of the region, authoritarian regimes do not want to see such freedom developing and they will keep promoting media outlets that embellish their image and tarnish their adversaries' (countries or individuals). When it comes to diversity, yes we will witness thousands of new media outlets but with the issues noted above, this is not necessarily a positive thing.

In my country Libya, I think we are facing a big challenges, but with peace, stability and partnerships will develop the mass media.

Egypt and Lebanon will remain the hubs of TV stations; Qatar will continue to broadcast Aljazeera which however will lose relevance. The most important development will take place online, with the region following the same pattern as the West.

Private sector would have more influence and wider spectrum in most of the countries 2025.

Do not know.

I think that the content will develop, but with greater state and self-censorship.

Again, what we see in the moment is more restriction – especially in Egypt – or at least not much movement. I don't expect improvement in the next decade.

Censorship and repression will likely remain the norm throughout most of MENA. Conditions in Morocco and Turkey are worse now than a decade ago. The types of mass media that enable mass consumption will be allowed to function. The types of mass media that serve as a check to power will continue to be tightly constrained.

With high censorship.

Mass media may be one of the most developed sector in the region. Liberalisation, access to internet, and new technologies have boosted the development of media systems. Countries: Algeria, Gulf, Turkey.

In entertainment, the Gulf has a potential to dominate. News consumption is tending to be increasingly fragmented and diverse. For cultural reasons, independent media has limited potential to improve, while the quality seems to follow global standards.

Difficult to predict. The conservative kingdoms (Saudi Arabia and Morocco in particular) don't want mass media to be uncontrolled.

In all places I anticipate that the trend toward the inability of governments to control mass media will continue. This will mean, at least on some level, greater access for all to media that will allow them to express themselves. What that means for quality is probably that there will be a lot of garbage being produced but that is neither new nor a big problem, as long as people are taught how to find and analyze information.

I don't see any chance of improvement vis-a-vis independence and freedom of press in any of the countries of the region. Nonetheless independent online media outlets that have their base outside these countries can provide a very useful insight about what is actually happening in Turkey, Egypt, Maghreb or Mishreq [sic]. Israel is, of course, the only the country with free press in the region. Nonetheless crisis in media, but also the direct affiliation of outlets with political parties definitely undermines the journalistic product as such.

The MENA "media system" mirrors that of other media cultures world-wide. Media orgs in the region try their best to challenge regimes on reporting the news as they do not necessarily see their primary drive as propaganda machines. How they evolve will depend much on the restrictions put on them by state censors. Examples of this are the limiting of press freedoms in Turkey and almost simultaneous increases of press freedom post-spring in Tunisia (even if the latter is now changing).

I have insufficient knowledge about the media landscape in the region.

Morocco: media will remain relatively restricted and internet will continue to deal with self-censorship for a mid-term period Tunisia: media will professionalize its standards and will improve in quality and in plurality. alternative digital media will be one important share of media landscape in Tunisia in a short-term Egypt: traditional medias will continue to echo official regime narratives and internet will remain heavily controlled, so that activists will need to develop very creative ways of transcending censorship. Technology and artistic creativity will be essential to overcome limitations of expression in Egypt. The time span in mid-term. At a long term it might even implode Gulf countries will grow in difficulties in maintaining the technological status quo. while traditional media will be stuck to official narratives, digital media and social media will experiment new ways of avoiding censorship and thus will increase its defiance towards established Gulf regimes.

In countries like Turkey, Iran and Egypt, there will be more homogenization and government control over the media by 2025. However, we are likely to see the further erosion in the impacts of the traditional media in these countries. As a reaction, we are likely to see the emergence of low-cost digital media platforms and diaspora journalism.

It is already developed in the Arab world, however, no positive results on diversity or independence.

Most countries are cracking down on the media dramatically. I do not expect to see much change here.

Online media will continue to develop as a source of independent information in the coming five to ten years – while gov't censorship will attempt to keep it constrained, especially in places like Egypt and Turkey, the nature of gov't IT capacity vs online journalists' capacity means this will not be successful. In places with less access to modern high-speed online infrastructure (e.g., Algeria), this development will be significantly slower and more easily hindered – and may represent a reason why gov'ts in those sorts of countries may push back against widespread ICT development. "Mass media", such as newspapers, state news agencies, and television, will continue to skew pro-gov't, especially in "strongman, top-down-directed" societies like Turkey and Egypt over the coming five to ten years, due in part to gov't censorship, but also due the high cost of producing traditional media – such large endeavors are inherently risk-adverse and thus will be keen to avoid the risk associated with producing highly critical content. While free media will continue to flourish online, and even grow, it will be susceptible to the same issues (rumor-mongering, conspiracy theorizing, falsification of information) that Western online media is tackling today. Indeed, this has already begun.

As elsewhere, the mass media is being disrupted by new technologies. As elsewhere, there is likely to be greater decentralization and diffusion of news sources. Some countries such as Iran, Saudi Arabia, and Egypt will try to maintain strict control over their national media, but in an age of swiftly changing media technologies, that seems a losing battle.

Gulf, 2025: Mass media has become a driver of state propaganda. This development will continue by 2025. As we can see in the Qatar crisis, state- or semi-state-owned media outlets are waging a propaganda war against their respective rivals. Fake news, media-related PR campaigns and agenda-setting have also gained further relevance in the Arab Gulf countries. For instance, the positive image of Aljazeera has faded away in recent years. In general, quality, independence and diversity will further decrease. However, social media can fill this vacuum to some extent, as described earlier.

Mass media systems are seen by many of the regimes in the area (if not all) as a way to enhance the existing governance systems and the narrative of the governing parties. They will continue to be highly influenced by the regimes, and the competition to them and their narratives can probably only come in online media and social media, and even this is difficult due to the ability of regime to conduct surveillance on what is published online.

I am not sure there is a similar path of all MENA countries. In a country like Egypt where Mass media are fully controlled by the State, the move toward more diversity and independence depends on the willingness of the regime to politically liberalize and the capacity of the society to increase pressure for further liberalization... If one or both of these pre-requisites emerged in the medium or longer term, a move toward further independence and diversity will happen...

Looking at Egypt, Gulf and North Africa: (1) ownership remains in the hands of governments and big business. This has an influence on content which is not attractive to the public. (2) Social media had displaced mass media as a source of news and views. International sources are replacing national sources for the well educated. (3) Print newspapers started closing down. This trend will continue.

The answer would depend, in a way, on the prospects for internet penetration. And of course, on the advances towards “democracy”! Independent media (more often than not that means also high-quality media) will keep being scarce and linked to outstanding individuals (thus, sometimes, too personalistic) – Mada Masr in Egypt comes to mind. Gulf countries will keep betting on who can produce the biggest share of both biased and outright fake news. Not even Israel gives us hope nowadays.

Mass media systems will grow in diversity and improve in terms of quality in Tunisia by 2025. Achieving more independence might take a little longer. There are some positive signs for improvement especially in electronic media, not much the same with televisions.

In general I think mass media is going to be more independent, diverse yet weak in its quality.

They are likely to get more polarized and more populist. It is unlikely that they are Independent from major political currents and leading (dominant states in the region).

Mass media is growing decreasingly diverse, independent and increasingly propagandistic across the region as regimes realize its usefulness as a tool. In countries like Libya where power and resources are shared amongst multiple powerful factions, each faction ultimately develops its own partisan media outlets. As a result of this youth and other excluded groups of society are increasingly going online and ignoring traditional media outlets.

They will degrade: less diversity, less independence and less quality. Private media will be in the hands of the economic elite – much like it is today, public media will be controlled by the state – that will be the case in the Gulf, Egypt and Turkey. Israel and Maghreb will have free media, partially Mashreq will too.

Mass media is likely to remain tightly controlled, but the presence of the internet will allow for outlets such as 7iber in Jordan and others to produce high quality news that is also critical of governing elites. The countries of North Africa and the Levant are more likely to move in this direction than the Gulf in the near to medium term future.

For MENA high diversity poor quality and lack of independence and corruption.

The development of mass media system in the MENA region will be hindered by the regimes' repressive law and the interdiction of broadcasting from the country. Some Arab satellite channels cannot open offices and broadcast from inside. The domestication of these mass media is high political stake for the ruling elites. The regimes' control of "traditional" media promote in fact internet and social networks that are outside their control, even they don't hesitate to cutting off user's internet access. The political censorship is more applied to media because the freedom expression than for the conservative religious discourse for example. The Arab conservative religious' satellite channels are not concerned really by the censorship contrary to that diffusing a political/debates programs. So, we have two main trends: high development, in terms of technology, human resources and professionalism; and intense process of domestication.

As time passes media will be more diverse and independent.

Mass media in Egypt will be advanced in 2050. No real development will be felt before that time horizon. In Morocco and Jordan the mass media will be of higher quality by 2015. Would rather not answer about most countries. With regard to Turkey, in the short run I foresee less freedom and more control.

## 7. URBANIZATION

Lot of efforts are done to curb urbanization, but it would take some time to control this issue.

Not so much urbanization that will drive this per se. It is underlying general poverty that simply remains. The poor may change places, but they stay poor.

I do think that the inequalities right now are already quite high. Though, I think they will increase, the rate of growth will slow down because of wealth accumulation of the entire society.

Almost no MENA countries are prepared to tackle growing urban populations except perhaps the Gulf countries who still have enough money.

Right now, urbanization is having these effects. I do not see that changing in the next decades. Most regimes have turned real-estate development, infrastructure and megaprojects into pillars of political stability as these types of capital investment continue to enrich the political elites. The neo-liberal model of urban development (gated housing estates, private car-dominated, exclusionary spaces of consumption for the upper classes, few really public places, deficient public transit systems) adopted across MENA exacerbates social fragmentation.

If current trends continue, urbanization will almost certainly mean a smaller portion of the population living in prosperous neighborhoods while the majority live in slums. To avoid this, governments would have to have a plan for the future of urbanization. I don't see that happening.

With the exception of Turkey, every other country in the region has limited arable lands, water and enough space to maintain small and medium size urban settlements across Anatolia. So

urbanization will be much more smooth there. Anywhere else, social and economic inequalities are going to become bigger.

Urbanisation is a growing trend all over the region and it will expand, particularly facing more environmental problems in rural areas making agricultural labor more difficult and less profitable. Therefore, populations all over the region will continue moving from rural areas to cities to search for work and opportunities.

Worldwide, the trend is toward urbanization. The Middle East will be no exception. The mass migration to cities will indeed highlight social and economic inequalities. In the Gulf in particular, this urbanization has already occurred (90-95 per cent of Saudis live in urban areas), so such tensions will be nothing new.

For decades, urbanization forms one main challenge for Arab societies. This will continue. Splitting of family structures, the erosion of traditional core families and the evolvement of single households combined with weakened traditional (tribal) structures and a high population growth will continue to foster urbanization. This will be the case in Egypt and the Gulf where centralized political systems further attract people to move away from rural areas.

Cities remain attractive for job seekers and those interested in a better life style. Projections for urbanisation place 70 per cent in cities in the future.

Do not have sufficient knowledge on the matter (except if by “urbanization” in Israel you mean “settlements” in Golan/Negev/OPTs...!)

The expanding urbanisation is not being accompanied by adequate policies for territorial management and enhancing economic equalities. This will lead to growing social and economic inequalities even in the urbanised areas.

The big problem for the future seems to be random urbanization, where no adequate social or physical infrastructure is in place. I see most risk for that sort of development in Egypt and the Maghreb/Mashreq region.

My answers are speculative.

Social and economic inequalities are high today within cities as well as in the countryside. I do not see urbanisation as a major cause for increasing inequalities and fragmentation. At most, inequalities will become more visible, but they are visible enough today.

In the places where urbanization is high or where financial incentives to remain in the periphery are high and there is good infrastructure (e.g. Israel, Gulf, excluding Yemen) urbanization will not increase. Quality of life may be assessed as better outside of City centers. In countries with huge populations in rural areas and no successful strategy to keep them there,, it is likely to increase.

Across the Maghreb, the fact that there isn't a significantly greater opportunity of works in major cities makes urbanisation less dramatic than elsewhere. Judging by protest movements there is a greater call from local communities to demand local development, especially in usually marginalised [sic] areas whose resources contribute heavily to the national economy. Egypt is the opposite of the rest of North Africa, where urbanisation seems to be occurring [sic] exponentially and the incapability of the economy to handle the increasing number of people entering the job-market on a yearly basis has led to massive slums and stark inequality. Sisi's inability to improve the economy and instead (alongside the IMF) expedite its decline makes growing inequality and thus fragmentation increasingly likely. As economies fail across the Mashreq, and refugees continue to be drawn to the region, urbanisation is increasing. The inability of city planners to accommodate these changes is leading to stark differences between social groups within cities (i.e. West Amman vs. the rest of the city).

Urbanization will increase social and economic inequalities if it is not dealt with via public policy.

The gulf countries and Maghreb countries will not experience high rate of urbanization, as rural areas will be developed by 2025. The Mashreq countries will experience higher rates of urbanization causing social inequalities.

## 8. GENDER EQUALITY

For most countries it will some time – generations – to achieve progress in gender equality (as it used to be in Western/European societies for a long time, for instance).

In the Maghreb, Tunisia should be taken aside as progress in gender equality will be noticeable there. Libya however will witness a negative evolution.

Very strong trends for gender equality, no doubt.

In the shorter term, I see positive change in gender equality in countries with formal legislation and society buy-in. In the longer term, I expect to see positive change everywhere.

I deeply believe that the tendency continues, perhaps not immediately significant everywhere but it is there. Women have become too important for economies.

Regimes that feel immediately threatened by reactionary/Islamist pressure groups will continue to sacrifice women's rights in order to insure their popularity and survival. The regimes that feel secure are those that can "afford" to protect and extend them.

This one seems to be a Western approach to the issue which is hard to answer.

The Arab World is going backwards today about gender issues while Turkey, Iran, and Israel are making progress.

On this I like to be cautiously optimistic. I believe in the power of a younger, well-educated generation in certain countries to change laws and regulations. As people have demonstrated in countries where laws attempting to insure the rights of all genders has demonstrated, however, significant structural, religious, and other “cultural” obstacles stand in the way of real change.

In the foreseeable future the paradigm about gender will probably move to a more traditional, religious prototype. But, in the long run it will rebalance.

Gender equality is an essential condition for development. North African countries are already advancing in terms of equality, with huge differences from country to country. But it is inevitable that they will have to improve gender equality in the long term (2050). Those countries that will still be reluctant in 2025 will have to assume more legislation and provisions to guarantee gender equality.

With the exception of the Maghreb, most states in the region are engaged in increasing repression. When women are granted rights, they are often hollow and used as window dressing. In a few cases, such as Turkey and Israel, increasingly conservative governments will lead to more repressive environments for women.

Women in the Middle East are finding their voice and increasingly demanding their rights. One somewhat superficial consequence of this, of course, was the Saudi decision this year to allow women to drive. More of that kind of change seems on the horizon as 51 per cent of the population begins to play a greater political role. Their demands are likely to be different, though, and encounter greater cultural resistance, than in the West.

Regarding the Gulf countries, women have become a significant driver for social and economic change. This trend will continue. Furthermore, the governments have understood the necessity to better integrate women into the job market and the political decision-making system. In recent years, the level of female education further improved and now women have become more ambitious and better educated than their male competitors. In times of high youth unemployment, women show more talent to adopt to new demands on the job market than men. This is officially supported by legal regulations and stepwise social liberalizations such as the lift of driving ban for women in Saudi Arabia. Gulf governments need women to foster economic diversification, to improve their image in the world and consolidate their power.

This is a powerful social trend, driven by both internal and external factors, and the Saudi model has broken the last taboo.

The question specifying “formal progress” is quite telling. Cosmetic changes in the Gulf come to mind. Even Iran could follow suit in that regard!

In general, there is likely to be more formal progress on gender equality in the Maghreb countries regarding the current social dynamics. With the new “shift” in Saudi Arabia, there are also likely to be more progress in this area that can influence other countries in the Gulf who are already much more progressive than KSA. But this change is likely to be fragile, apt to change with the rise and

fall of new figures and subject to political calculations rather.

The situation today is vastly different as between countries. So it is a question of how much there is need to make progress as well as of the will: no change can mean different things.

There appears to be a trend towards legal equality that is occurring [sic] throughout the region, in some places more quickly than others (i.e. Morocco and Tunisia's more lively legal systems provide women greater legal rights and opportunities than Libya and Egypt). This is evident event in traditional extremely conservative regions such as Saudi Arabia which is using improvements in women's legal rights to mask other abuses or reversals in human rights.

Only Tunisia is moving forward with meaningful reforms on gender equality.

Gender equality will be advanced in both Mashreq and Maghreb countries by 2025. This will also be much more advanced by 2050.

## 9. MILITARY AND SECURITY

Apart from Israel, the army/police in all of these countries remains disconnected from the rest of the population; in other words, it's a system, not institutions where all citizens converge. Therefore, their popularity will always be limited, and there will always be people contesting their legitimacy. It is not sustainable. As for militias, they will endure as long as the state is weak. So if the region's states continue disintegrating, militias will continue to exist. But if states recover their strength/ find new forces/reform, militias will disband.

The general tendency is to move to a more non militant system.

With time, I expect to see lesser influence of the military and security everywhere. For Egypt and Israel, this should take longer time given the support of the US.

Not much changes for a short perspective but some for a longer one. In fragmented societies like Iraq, Syria, Libya, groups will not give up arms (militias). Egypt and Gulf states will remain security states, also Israel.

I think the influence of military/security apparatus is deeply entrenched everywhere and this will not change in the short term (2025). The global war on terror (or whatever it's called these days), military budgets, security agreements with US and EU countries greatly strengthen this influence. The declining influence of the Turkish military under Erdogan/AK Party is set to continue. In the long term (2050), I cannot say. Any change will depend more on changing global geopolitical conditions than domestic politics.

Military and intelligence apparatus is regarded as a key for political and social stability overall the region. Also, they represent a significant part of the economies.

I see nothing to suggest this is the case in most countries. There may be some interesting exceptions like Tunisia or Oman.

In every country except Turkey, the military will maintain influence until 2025. Apparently, Egypt and Israel stand on the opposite side. As for 2050, if we assume that the referred countries of the region will keep their current status (and borders) the things will be a bit different. For Israel the military influence is a condition identified with its own existence. At the same time, Turkey is pursuing a regional power role, so the influence of the military will occasionally rebalance to a similarly with pro 2016 status (even though quite different than the Kemalist example). Iran and Egypt will also keep their political classes closely connected with the military, while the Gulf states will further be militarized.

Gulf countries will push for harder securitization and stronger apparatuses, but Maghreb countries will start to lower their contributions to the security budget allocations. Besides, militias will still be dominant in certain areas in 2025 but they will probably be less influential or marginal in 2050.

In the short term I expect no major change. But in the longer time span (2050), I anticipate more positive trends as regards the lessening of military-security apparatus' influence in these countries.

As occurred in Latin America in the 1980s, we are likely to see a push back among citizens against the oversized role that militaries and security services play in countries like Egypt and Iran.

With regards to Iran, Israel and the Gulf, it depends if the Iranian-Israeli-Saudi conflict will militarily escalate in the future. Especially Saudi Arabia is looking to create local content in the military industry to become more independent from US and European military equipment. Thus, the relevance of military will probably remain high but might shift from external security providers to a national security infrastructure. However, the Iranian-US tensions will foster the armament of those countries. In this regard, a nuclear arms race is possible by 2025 due to the US withdrawal from the JCPoA.

The role of the military is linked to historical factors, as well as the level of tension inside countries and between them. The weak role of civil society, particularly political parties and NGOs, means that there will be a long wait before big changes happen.

It all depends on how you specifically define "military and security apparatus" (take for instance a look at the UAE case). When it comes to the Maghreb, it is impossible to answer with countries a world apart such as Morocco, Tunisia, Libya and Algeria. Same with the Mashreq.

The level of influence that the military apparatus has in countries like Algeria and Egypt is so strong that it is very unlikely to see a decline of this influence by 2025. Change in the long-term could be possible, but this is very hard to predict in a highly volatile environment. Powerful institutions are very resilient and are likely to restore their models even in cases of upheavals. Similarly in Libya the influence of militia will remain evident at least till 2025.

Answers are based on the current structural position of the military in respective countries.

2025: Don't see any factor that could lead to major change in Status quo of influence, definitely in the short term. And in those countries that are not political reform oriented. 2050: If countries go through political transitions and Jihadism decreases, I can see the military apparatuses slowly losing influence.

The primacy of the military/security apparatus across the region, either regarding its political control such as in Egypt, or its glorification such as in Israel, or its respected status as a tool of the state which is also used domestically such as with the Gulf and Turkey, seems unshakeable in the short-term. In the long-term it seems that Sisi's military leadership, and the increasing dominance the Egyptian military is showcasing over the Egyptian economy means that the military as we know it will likely be the dividing line of its next revolution. In the Mashreq and Gulf the primacy of the state security services is increasingly tied to the fate of the regimes, given their increasing development into "Mukhabarat states".

The military and security apparatus (as well as militias) will continue to influence the region.

It will not be easy for the military to lose its influence in Mashreq and Maghreb countries before 2050.

## 10. STATE BORDERS

In Northern Iraq some changes are likely and depending on the politics of Morocco the Sahraui [sic] question might reach a solution – and be it via violence/protest of the youth there. In the long run it might be, that some relaxation of tensions and military threat will be reduced in the MENA-region.

Several conflicts are tearing the region apart, and the trend seems ongoing. This will probably affect the borders (Libya, Sudan, Iraq and Syria are the countries most likely to see their borders changing).

Syria and Iraq in particular.

My guess for 2050 is that some states (either Syria, or Iraq, or Libya) will fragment. As wild card events, even wars (SA-Iran ...) could result in shifted borders.

This is just too hard to answer. My strongest guess is Yemen, with an independent South (before 2025). However also the corrosion of Iraq, Syria, Libya could go on.

Palestine, Israel, Sudan, Gulf.

Syria and Iraq are likely to have minimal changes.

This is a strange thing to try to predict. I suspect things will change a bit, hopefully in the direction of voluntary economic alliances. As for national borders, I have no idea.

2025: Syria, Libya and Iraq will continue to be more and more less coherent. 2050: By then these countries will not exist in this manner.

There will definitely be border changes related to the Kurdish question. Furthermore, some of the current failed states will not be able to hold it together and there will be de facto or de jure border changes. Finally, another round of Arab revolts may lead to border changes.

By 2050 some Middle East borders around the Kurdistan might change slightly or borders between Israel and Palestine.

The current regional and international status quo as regards the preservation of state borders in Middle East will prevail by 2025. Yet Iraq, Syria, Libya, Yemen will continue to be fragile states with the possibilities of state break ups in the longer run, 2050.

Many have argued that the borders in the Middle East were written arbitrarily. That is true in many parts of the region, but it is true as well in many other parts of the world. Moreover, it is hard to see how, given how entangled different ethnic communities are in the region, rewriting borders would lead to better political outcomes. In fact, it is more likely to be highly destabilizing politically. Nonetheless, some border adjustments seem likely, even if politically unwise. The Kurds, for instance, are likely at some point to carve out a state of their own.

Taken the fragile situation in Yemen between the South and North into consideration, it seems possible that Yemen will again split apart into a Northern and Southern part or in several semi-autonomous entities.

Israel, Jordan, Iraq, Syria.

Despite pressures from inside and outside on some countries, territorial state borders will remain resilient.

In Mashreq countries.

Don't see this as a major factor in the future.

Syria these years Israel/Palestine (insha'Allah) in a few decades.

Many political conflicts in the region can eventually only be solved through a (slight) change in borders.

Israel/Palestine entire the Levant and Yemen will undergo big changes in the borders for reasons related to the ongoing conflicts and their resolutions.

Do not see changes in the short term. In the long term: Western Sahara status may change (most likely autonomy within Morocco), Israel-Palestine may see changes (swaps), a Kurdish state may emerge...

The only opportunity for state-borders to change in the short-term is from Turkey's slowly strengthening hints that the treaties which drew borders following WWI are expiring and they will "reclaim" land. As well as Israel's increasing forcible appropriation of Palestinian land and their displacement. The formal end of the Syrian war may also lead to some subtle border changes in the south and north of the country. In the longer-term some kind of flux seems likely, however whether this comes in the form of new ethno states (Berbers, Kurds etc.), or regional alliances without firm border changes (such as Mashreq and Maghrebi equivalents of the GCC) is still not apparent. Fluidity may occur in the Iraqi/Iranian/Turkish zone which never fully settled as well as in the Mashreq as Israeli expansionism seeks to end the Palestinian state and create a new reality and border layout between themselves and neighboring states.

Iraq by 2050 Syria by 2050 Jordan by 2050.

## 11. FOREIGN INFLUENCE

China already is a growing partner/power in most countries in the region, and will do so in the future because of its immense size and growth (including the "new silkroad"-strategy). Japan and the USA will very likely be of lesser relevance.

China is an ascending force. If the US continues in its decline and isolationism, then it will probably lose strength. Russia is eager to have more influence in the region and is likely to hold on its gains. The EU will secure its traditional zones of influence if it survives its current crises.

US and Europe would always have stronger ties with the countries in the region but with growing influence of China.

Russia's influence will decline because of its declining economic strength.

The assessment for 2025 reflects pretty much the current status of foreign influence, mostly dominated by the EU, the US, and Russia. In the future, I expect to see a more prominent influence of China and Russia in addition to the EU and the US.

The USA is on their way out – but 2025 is too early to have lost all influence. Israel and the Gulf states will still look to Washington. However until 2050 everything will be changed and China will have found her role also in the MENA region.

Short term (2025), the hegemony of USA over most of MENA is not likely to change. Russia influence in Mashreq, Turkey and Iran is likely to grow. The EU has lost all capacity to influence ME, though remains influential in NA. Long term (2050), Chinese & Russian influence is likely to grow in terms of diplomacy & security relations. China & India are likely to become more influential economically.

The EU will partially succeed in increasing its role, but the USA and Russia have a strong position.

I'd have preferred not to try anticipating 2050. That I feel is an arbitrary answer. If we are talking economic influence, the Chinese are at the top. The EU has powerful influence in the Maghreb and Russia in the Mashreq (namely Syria right now). China and India will carry major economic influence in terms of goods and services produced in the future but who knows about decades from now. US influence, while not disappearing, will only continue on the diplomatic and economic levels if a series of internationally aware administrations take over.

2025: Even though I chose this ranking, I'm not sure on whether Russia or EU should be put in the second place. Definitely EU is a much stronger player in terms of economy, but Russia has played its geopolitical cards efficiently, even though its actual capacity is quite smaller. EU has limited geopolitical imprint since individual countries (UK, France, Italy, Spain) have historical and economic interests, but small capacity. Only a unified foreign policy could magnify this imprint probably by 2050. Then, in terms of economics and geopolitics China could challenge the influence of western powers and Russia. The success of "belt and road" project could determine the degree of Chinese intrusion in the region. I would not exclude the potential rise of India in the region, partly as a counterbalance to Beijing's rising influence.

China will probably get its benefits from the long term investment in the MENA region and will probably increase its influence dramatically in 2050.

Despite some reduction in the US influence in the region, the US is likely to remain to be the most important outside actor. Russia's regional impact is likely to be limited. China is likely to raise its profile in regional affairs. The EU is arguably has more influence than many acknowledges in the region. The EU's impact will be more visible once the conflictual phase of regional affairs lose steam.

The US will remain the most important external player in the region for some time, even if the degree of its influence and interest diminishes with time. Look for China and/or the EU to play a more significant role over the longer term. The latter because it is its neighborhood; the former because of its unceasing quest for resources.

On the long-run, the United States will further lose ground the Middle East and will not only economically but also politically be replaced by China and Russia due to the latter authoritarian style as pragmatic partners in terms of economy, security and power consolidation. The influence of the EU will further shrink due to internal fragmentation, lacking common political interests and a deteriorating image as an economic role model.

Don't see the US or Russia backtracking in the least. China will not cease exerting influence in several dimensions and in its own way. I am tempted to locate the EU last in 2050, but geography prevents me to.

It is most likely certain that India and Japan will not have a stronger influence on the MENA by 2025 or 2050. Russia will have a stronger influence by 2025 regarding current dynamics, but this

influence is likely to be fragile and could be “provisional”. China will grow in influence and this should become a steady trend. It is clear also that the EU is losing its political influence though very important in terms of economy at least till 2025. If MENA countries continue to diversify partners, the EU will lose more influence by 2025.

Given the expected power structure of the region, its foreseen position in the world order and the foreseen balance of power, the EU will remain a more influential power in the region, then Russia with its economic and military presence and then the USA with its legacy and then China as a new superpower with economic interests.

Russia in the short term, as it is getting re-engaged, but with less of a consistent long term soft power approach than China. The EU will remain important as neighbor. Unsure about the rest, though likely that EU will remain third in long term, as US pulls back and feels consequences of its problematic policies in the early 2000s, EU after all geographically the closest, so always certain influence and relevance for countries economically and society wise (ties through migration, thus influence).

Although Russia is seeking to cement a certain standard of influence, and may see an avenue for expansion with the new factions being drawn, it seems unlikely they can support this in the long-term given domestic issues. The USA will have a strong presence in the region for as long as they have their special connection to Israel and they take it upon themselves to police the shipping lanes and hydrocarbon exports necessary for stable global commodity markets. However the belt and road initiative and China’s different, investment heavy style of foreign policy is likely to see China become a closer economic and trading partner and ultimately more influential although the USA’s security primacy is likely to remain unchallenged. The EU are currently heavy investors, and manage a lot of soft-power as the EU and various examples of hard power as individual member-states. However there is currently a clear inability by the EU to convert this into political influence. Given the likelihood that the region will increase in importance for Europe, both as a source of crises (migration/security) and as a trading partner, it seems inevitable that the EU and its member states will be able to reverse the deficit between their expenditure and the influence they command as a result. Although whether they can replace the USA as a security guarantor, or China as a main trading and investment partner is questionable. India is increasingly relevant in the region due to the large number of Indian labor propping up the region, and its growing role as a supplier. If MENA ever becomes an exporter in a more diverse way than hydrocarbons than the relationship will inevitably develop. However India’s relationship with MENA seems likely to be tied to the dynamics of their expat communities in the region. If Japan seeks to actively contain Chinese expansionism or guarantee a certain percentage of hydrocarbons it may grow its role. Although this doesn’t seem likely and it seems content in its trading relationships with the Gulf states at present and is relatively a political as a foreign policy operator in the region.

World order is changing.

USA will start to its power and influence by 2050. Japan does not have power on the region and will not have in the future. China and India will be more powerful by 2050.

## 12. MENA AND THE EU

In the center of future activities of the EU in the region should be supporting MENA-countries in their efforts to realize the SDGs (sustainable development goals of the UN), which encompass the most important policy areas for a future-oriented development.

EU is not a coherent international actor. They will follow the US leadership in the Middle East.

EU institutions should continue working on modernizing MENA bureaucracies, reducing the impact of corruption and introducing the culture of human rights in state institutions and in the public space. Yet the EU should make sure its work is not perceived as neocolonialist, as historic grievances are still strong and the Extreme Right in Europe is not hiding its projects.

EU should change his bureaucrat slow plans to play essential role by increase all terms of partnership, first by implementation of peace, human rights and democracy, second scholarships, concentrate of internship, and training.

Continue to act as a symbol for good governance and democracy to follow. Seek exchange, reform efforts and inclusiveness.

(1) Stronger ties with most of the countries of the region; (2) More cooperation in renewable energy plans; (3) Joint education program and cooperation.

The EU should take a step back and not attempt to intervene, at all.

It is common wisdom that the EU should do more, but it's easy to say and hard to do. The internal struggle in the European will continue at least a decade.

EU policies (economic, security, migration) continue to exacerbate the region's problems. The EU wants to have its cake and eat it too. The neo-liberal agenda of transnational capital based in the EU contributes to environmental degradation, impoverishment, youth unemployment, the "stability" of abhorrent regimes, and political repression. Given its economic clout, the EU should confront Israel and force it to undertake real negotiations with Palestinians, but I don't foresee this happening any time soon. The EU should reverse its longstanding policies of enabling the accumulation of capital by its giant corporations at the expense of small businesses (that create most jobs) in MENA, but I don't foresee this happening any time soon. The EU should reverse its longstanding policy of enabling repressive illegitimate regimes (despite its discourses about democracy, good governance, etc.) and equipping their security and military apparatus, but I don't foresee this happening any time soon.

Support of education, knowledge, and gender equality.

Basically, EU should play the role China, Japan, South Africa, Brasil [sic]... have played in their geopolitical sphere. Improving economic co-development, integration, cooperation...

The EU should focus on security partnership and strengthen its ties with groups and individuals of strong potential of political leadership. Also, a focus should be on economic cooperation.

The EU needs to step into the role the US used to have in the region as the “honest broker” in agreements between states. The US support for Israel is ruining this and Russia and China are picking it up. The EU has experience in the region that is valuable and can make a positive contribution.

What role “should” they play is an interesting way of phrasing the question. I am guessing that comes from the funding source for the project. I should think that the EU would want to be an equal partner in free trade relationships with countries in the region, as a starter. Economic development projects are great, as long as they carry lasting impact for the peoples of the places where they happen. Trickle-down economic development in the form of huge grants for governments to build things can work (money to build a major highway, for example) but money should not be doled out like manna without any contextualization for a project. For example, why might France be interested in investing in economic development in Algeria? This is connected to history and political influence. Political influence might start by addressing directly the colonial past of many EU countries in the region – including an acknowledgement that the ideals of colonialism fundamentally contradicted all of the rhetoric of enlightened Europe and the EU. This doesn’t mean forgetting it – because the former colonized did not forget it and many of their descendants are now EU citizens. An excellent place to start is an apology and admission of guilt. This has begun but will need to be said openly, in press conferences, history textbooks, and diplomatic galas.

EU has no other option than to initially acquire two apparatuses: First of all to increase its defense capabilities as a means to promote its own interests in the region. Secondly, it should acquire a unified foreign policy. These two conditions are pre-requisites if EU really wants to stand a chance in a region where global players (but also regional ones) are involved. Partnerships should be mundanely targeted with countries that have liberal political systems. Probably Egypt will keep on being an exception due to its strategic position for the security of the continent. At the same period EU should invest heavily to build infrastructure and enhance the production capabilities of the MENA countries, since further deterioration in this capacity, would only destabilize them.

The EU is moving towards an accepted need for hard external borders with partnered neighbouring states which need to be stable. Hence neighbouring states (here referring to North Africa but also Syria and Iraq) will have to be invested in and partnered with to promote security and prosperity for the inhabitants of those states to ensure the stability of EU borders. That this might mean is investments in Algerian domestic gas exploration, investment in Tunisian, Moroccan and Libyan industrial modernisation, increasing overall investment in Egyptian state infrastructure and water-saving technologies etc.

The MENA region will remain the most important neighborhood for the EU, mainly because of population movements, security threats and energy security. In the context of a preventive policy, the EU needs to invest heavily in terms of economic development. It also needs to help those countries become more resilient and stable. It also needs to build partnerships in order to limit the negative influence of other major powers.

EU should play a role of honest partner, being coherent in its foreign policies with its predicated political and social values. Partnerships are essential but they should also be deployed with civil society actors that need support and reinforcement, and not only with official bodies of the government. The EU should focus in deploying coherent and consistent policies in the Southern rim, but also having political influence in mind.

The EU should have policy engagement, this should serve mostly for the management of crises and daily politics. But the EU should also have a generational engagement. The goal of this policy should be investing in the future of region or investing in the constituency with whom the EU should build the future. This second category has strong normative dimension.

The EU should continue to play an important economic and political role. The EU should continue its “more for more” strategy to strengthen partnerships with countries that share EU values (like Tunisia) and stay away from those that don’t.

Within the decline of EU neighborhood policies, I can only mention a role mediator among countries that are in conflict or cannot advance in their specific dispute. EU remains the only institution in the near region where all actors have still some respect and consideration in terms of political and economic interest.

The EU should seek to stabilize the region, helping to defuse Saudi-Iranian tensions and bring to an end the region’s many civil wars. More than any external actor, it has a profound interest, because of its proximity to the region, in seeing the current instability there abate. Its greatest leverage is likely to be access to its economic market.

The EU’s influence in its support for civil society is a long-term source of soft power. By forging sustainable long term partnership with like-minded partners in the MENA region it can shape the future of the region for the better. Compared to other actors in the international system the European ways of engaging with civil society are much more sophisticated and result in a better connection with local actors.

The EU will be better advised to deepen partnership in mainly economic development of the target countries. It would also be useful to support intra-regional cooperative mechanisms. Seeking larger political influence is likely to backfire.

EU needs to build partnerships that create jobs in the south Med and cultural understanding with the peoples of that region. Gradually introducing advanced norms and standards to the south, at its own pace and with full respect to its cultural values. A problem solving approach is needed towards regional conflicts, with a view to balancing the mistakes of US diplomacy.

Consensus, consensus, consensus (therefore willingness). If that quite simple goal is not achieved, influence will boil down to an unprecedented low, and bilateralism will be key, with everything that represents in term of reduced added value, fragmentation, redundancy, lack of trust.... Geography cannot be fooled, however – and the Mediterranean will never cease being a shared space in terms

of social, economic and cultural exchanges. Economic/trade relations will not suffer from the downgrade of political partnerships, although MENA countries would be more willing to engage with countries that do not stand for normativeness like China and India.

Economic relations between the EU and the MENA-countries have to be tightened, not first and foremost through trade agreements but through Aid for Trade and Trade Facilitation. Combined with smart conditionality this could possibly help to promote good governance and decrease potential for conflicts.

If the EU still exit in 2025, it shall more involved positively in resolving the ongoing conflicts in the region, expanding its economic partnerships with the regional states and organizations on the basis of equity and real cooperation.

Support democratic transitions by much extending bilateral credit and facilitating investment. Encourage bilateral trade liberalisation and freedom of movement of labour. Encourage circulation of labour and capital between MENA and EU (in opposition to erecting barriers, encouraging integration of those we have and opposing all that wish to come).

2025: Reliable partner that helps develop sustainable growth, through trade deals, and legal migration etc. That gives consistent signals regarding human rights and good governance by setting incentives (e.g. high legal and circular migration quotas for good performers). 2050: ???

The EU should take more responsibility in diplomatic engagement with the opposition parties urging for more parliamentary systems. It should push for further economic trade and in that way support the upcoming economies.

The EU should seek to grow their role as a trading partner and an investor, providing their expertise in assisting the governance reforms and infrastructure projects necessary to make MENA a more mature economic partner for Europe. Facilitating an economic transformation (and the political reforms necessary to facilitate that) is the best route towards limiting the liabilities and risks that MENA poses to Europe and simultaneously allowing it to become a prop to facilitate further European growth and a stronger Europe and European zone of economic influence in the face of Chines growing economic expansionism.

The EU will have greater influence in the region when it is strongly integrated within – if that happens by 2050 the EU has the chance of being the strongest player in MENA.

The EU should continue to play a positive role in terms of partnerships and economic development. However, to date, the EU's political influence has been minimal and has largely followed the trends set by the US. This has prevented the EU from playing a more constructive role where possible.

EU will be one of the economic and social partners if EU remains what it is today.

Contribute to security and economic development. Until now, EU has, in some extent externalized its repressive instruments to its neighborhood, by not democratic mechanisms. The stabilization

of the MENA region requires the two major tools in the same time: economic and political development. The authoritarian stability cannot be sustainable.

The EU should work with the young generation through education and civil society programs, but Europeans need also to make an effort and try to understand the cultural and political complexities of MENA.

The EU needs to complement its main tool, soft power, with some hard power. However, in addition to acquiring military capabilities, it also needs to demonstrate its will to use them when its vital interests are under threat.

Economic development and political partnerships should be the priorities.

EU will play a role in development in the region, as in the current situation.

The EU should continue to foster partnerships with all states in the region, aware of the errors of previous policies but also cautious not to overlook values for the sake of economic interest in the effort not to repeat past mistakes. More importantly there cannot be any EU action with influence in the region if it is not coordinated with other major influential actors in the region. Finally the EU should focus on youth, education and equality in the region.



**Middle East and North Africa Regional Architecture: Mapping geopolitical shifts, regional order and domestic transformations (MENARA)** is a research project that aims to shed light on domestic dynamics and bottom-up perspectives in the Middle East and North Africa amid increasingly volatile and uncertain times.

**MENARA** maps the driving variables and forces behind these dynamics and poses a single all-encompassing research question: Will the geopolitical future of the region be marked by either centrifugal or centripetal dynamics or a combination of both? In answering this question, the project is articulated around three levels of analysis (domestic, regional and global) and outlines future scenarios for 2025 and 2050. Its final objective is to provide EU Member States policy makers with valuable insights.

**MENARA** is carried out by a consortium of leading research institutions in the field of international relations, identity and religion politics, history, political sociology, demography, energy, economy, military and environmental studies.



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