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The Causes of Stability and Unrest in the Middle East and North Africa: An Analytic Survey

"Find their worst grievances and deal with them"

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Introduction

The current series of crises in the Middle East and North Africa (MENA) have many causes, and causes that that vary sharply by country. They include politics, religion, and ideology – shaped in many cases by major tribal, ethnic, sectarian, and regional differences within a given nation.

The political dynamics of these crises and unrest are, however, only part of the story. An examination of the broader demographic, economic, and security trends in the MENA region shows how critical these factors are in shaping public anger and discontent. They also show the critical role of governance, social change, and justice systems in shaping and dealing with each nation's problems.

This briefing summarizes current statistics and data on the key trends in demographics, economics, internal security and justice systems, governance, and social change to show how they affect both the region and individual nations.

The charts and tables show just how many variations exist in basic data on factors such as the size of given economies, per capita incomes, populations, and population growth rates. They include comparisons of efforts to provide summary scores on factors like governance and justice systems. Some of these comparisons speak for themselves in showing how untrustworthy such systems are as a substitute for looking at the details of how given countries do or do not meet given challenges.

The Need for Far Better Data, Planning, and Analysis

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

The charts and tables show just how many variations exist in basic data on factors such as the size of given economies, per capita incomes, populations, and population growth rates. They include comparisons of efforts to provide summary scores on factors including governance and justice systems. Some of these comparisons speak for themselves in showing how untrustworthy such systems areas a substitute for looking at the details of how given countries do or do not meet given challenges.

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

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

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

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

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

The Near Certainty of Regime Change Cannot Bring Near Term Stability

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

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

The demographic and economic data reveal patterns of population growth and other trends that make any quick solutions or improvements difficult to impossible. In the cases of far too many countries, problems such as the need for jobs on the part of the region's youth are, in and of themselves, certain to put extreme stress on their governments for a decade or more to come.

In such cases, governments may become more "legitimate" in the way they are chosen and in their reduced reliance on repression. They will not, however, be able to build legitimacy by successfully treating the underlying causes of unrest for years to come, and therefore political change alone offers little hope of future stability .

A Decade, Not a "Spring"

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

Most MENA states have no real political parties or pluralistic structures, and only the monarchies have a history of political legitimacy.

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

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

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

Setting the Stage –I

Comparisons Between Regions

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Setting the Stage - I

- No one Middle East; countries differ sharply in virtually every measure.
- Many key problems are outside government control:
  - Population rates.
  - Comparative economic advantage in natural resources.
  - Legacies of history
- No clear historical causes to predict unrest.
- Experts differ sharply on impact of weighting of given problems.
- Sharp differences and gaps in the data.
- National breakouts illustrate issues, do not portray fault or blame.

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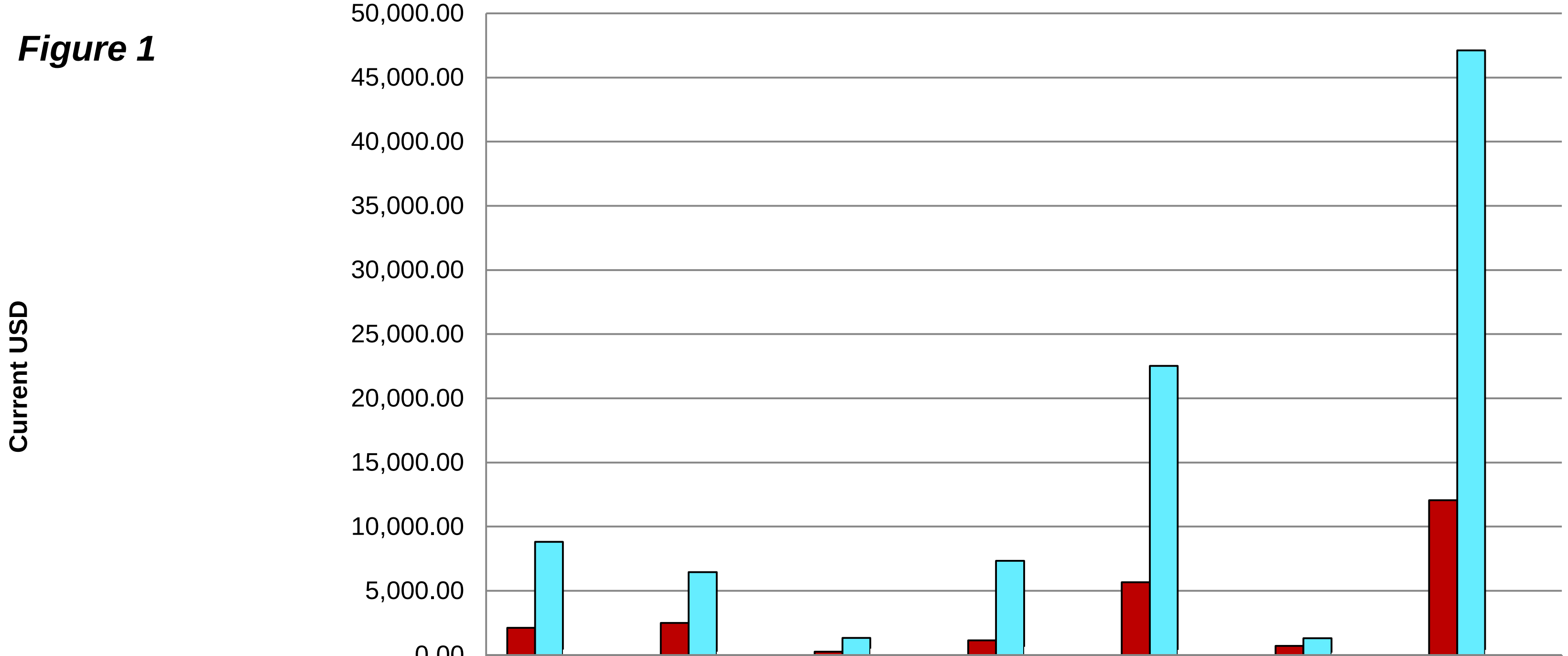
Per Capita GDP Growth: 1980 vs. 2010 by Region

Per Capita GDP: 1980 vs. 2010 (in current USD)

Figure 1



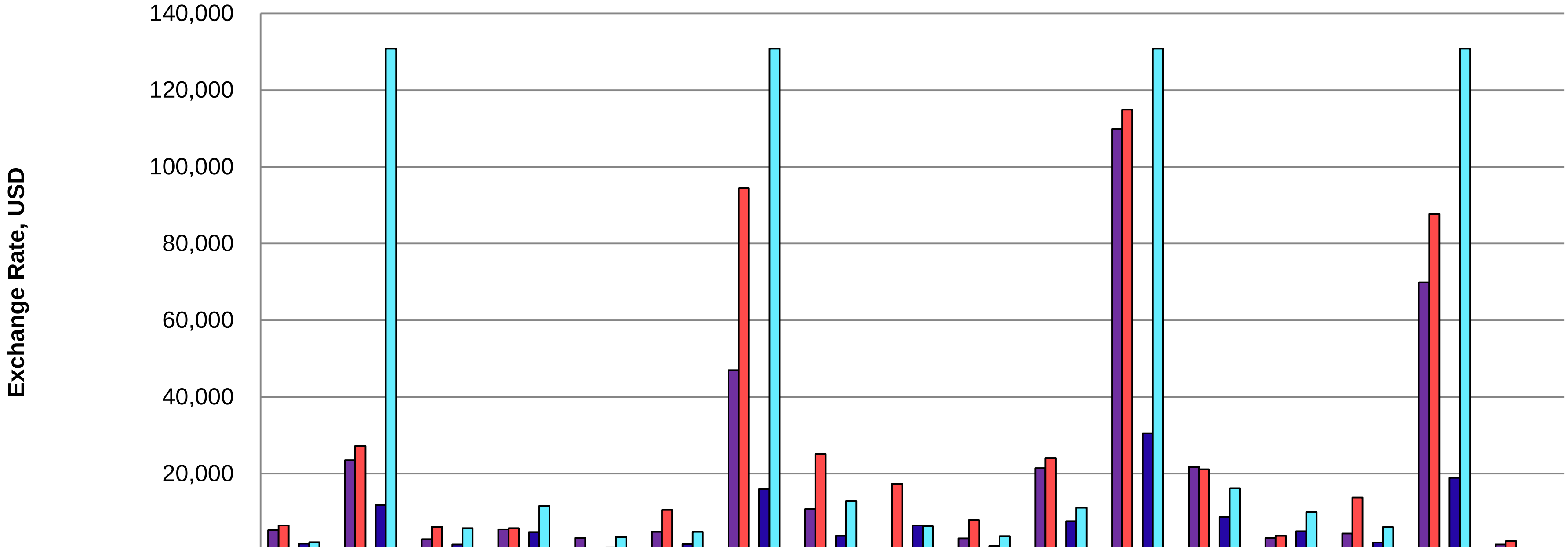
	Latin America & Caribbean	Middle East & North Africa	South Asia	East Asia & Pacific	Europe & Central Asia	Sub-Saharan Africa	North America
1980	2,127.00	2,500.00	261	1,143.00	5,666.00	704	12,063.00
2010	8,822.00	6,448.00	1,323.00	7,351.00	22,527.00	1,302.00	47,111.00
% change in GDP	415	258	507	643	398	185	391
Increase in Life Expectancy 1980-2009	5.4	9.4	14.6	7.1	4.5	9.6	5.7

Source: The World Bank: World, dataBank, January 2012.
http://databank.worldbank.org/ddp/home.do

Per Capita Income and Wealth in the MENA Region:

Comparing 2000 and 2011

Figure 2



	Algeria	Bahrain	Egypt	Iran	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE	Yemen
2011 Per Capita GDP	5,245	23,466	2,892	5,493	3,301	4,788	46,970	10,747		3,117	21,421	109,88	21,685	3,235	4,376	69,872	1,522
2011 Per Capita Wealth	6,536	27,231	6,119	5,802		10,582	94,453	25,197	17,368	7,905	24,084	114,89	21,153	3,804	13,758	87,704	2,365
2011 Wealth-Income Ratio	1.25	1.16	2.12	1.06	-	2.21	2.01	2.34		2.54	1.12	1.05	0.98	1.18	3.14	1.26	1.55
2000 Per Capita GDP	1,754	11,775	1,523	4,764	766	1,691	15,947	3,806	6,484	1,165	7,615	30,558	8,771	4,958	2,029	18,906	487
2000 Per Capita Wealth	2,087	130,83	5,754	11,621	3,480	4,825	130,83	12,828	6,285	3,687	11,130	130,83	16,206	10,046	6,042	130,83	537
2000 Wealth-Income Ratio	1.19	11.11	3.78	2.44	4.54	2.85	8.20	3.37	0.97	3.16	1.46	4.28	1.85	2.03	2.98	6.92	1.10

2011 Figures: Credit Suisse, Credit Suisse Research Institute, *Global Wealth Databook 2011. p. 19-22.* Accessed 2/10/2012 https://www.credit-suisse.com/news/doc/credit_suisse_global_wealth_databook.pdf

2000 Figures: By James B. Davies, Susanna Sandstrom, Anthony Shorrocks, and Edward N. Wolff. The World Distribution of Household Wealth. Tables to the 2006 report in Excel (including Gini coefficients for 229 countries). UN-WIDER.

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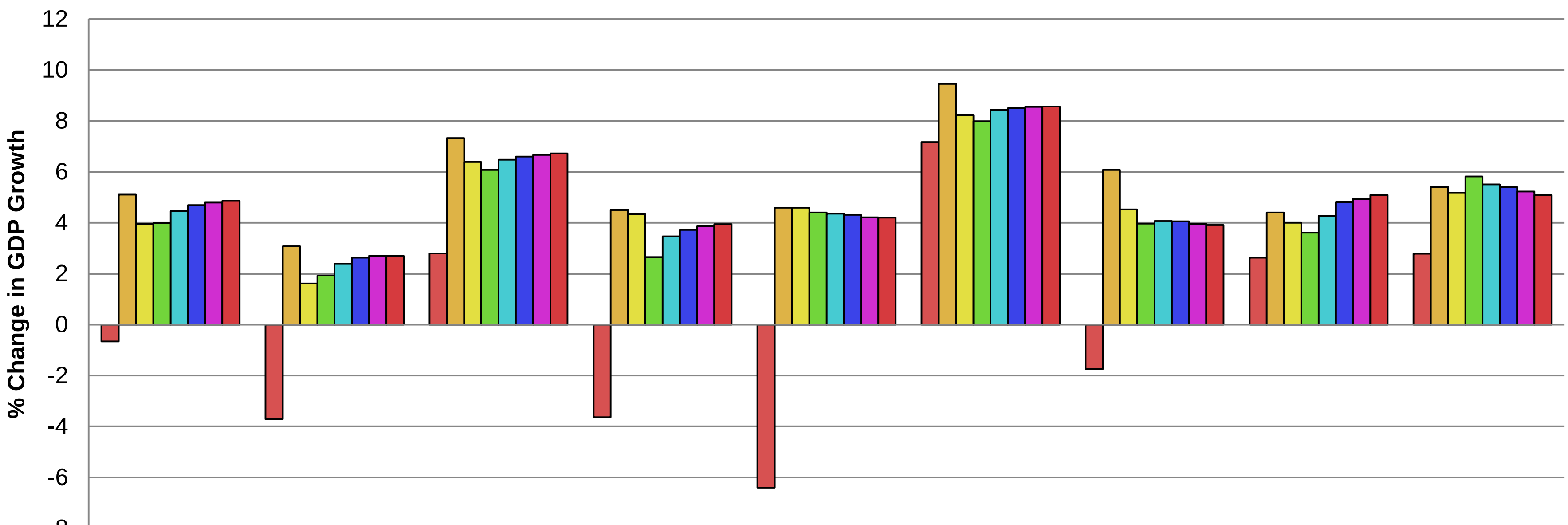
Barely Adequate Regional GDP Growth

Figure 3

Regional Comparison of GDP Growth

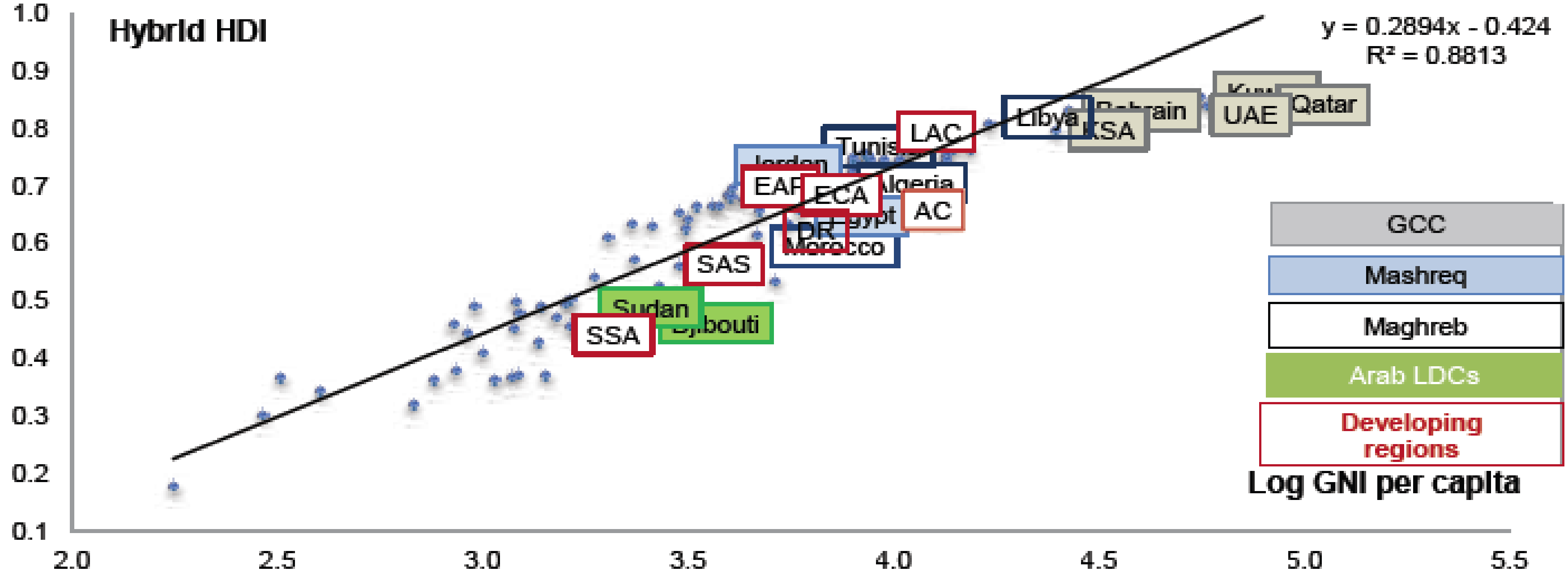


	World	Advanced economies	Emerging and developing economies	Central and eastern Europe	Commonwealth of Independent States	Developing Asia	Latin America and the Caribbean	Middle East and North Africa	Sub-Saharan Africa
2009	-0.663	-3.717	2.795	-3.642	-6.4	7.174	-1.747	2.626	2.784
2010	5.11	3.072	7.327	4.502	4.597	9.46	6.083	4.408	5.404
2011	3.955	1.613	6.395	4.337	4.595	8.216	4.532	4.002	5.174
2012	3.997	1.923	6.075	2.652	4.402	7.986	3.971	3.609	5.819
2013	4.466	2.381	6.477	3.465	4.355	8.445	4.069	4.276	5.507
2014	4.69	2.626	6.606	3.722	4.313	8.502	4.062	4.81	5.404
2015	4.799	2.714	6.665	3.868	4.214	8.555	3.957	4.935	5.227
2016	4.858	2.695	6.721	3.947	4.207	8.569	3.917	5.096	5.095

International Monetary Fund, World Economic Outlook Database, Updated September 2011, Accessed February 1, 2012.
http://www.imf.org/external/pubs/ft/weo/2011/02/weodata/index.aspx

Regional and National differences in HDI and Per Capita Income

Figure 1: GNI per capita versus hybrid HDI for Arab and developing countries, 2010



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

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

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Mixed Ranking of Most Arab Countries in Terms of Change in UN Human Development Index (HDI), 1970–2010 and 1990-2010

HDI improvement Rank	Country Name	Non-Income HDI rank	GDP Growth rank	HDI improvement Rank	Non-Income HDI rank	GDP Growth rank
		1970-2010			1970-2010	
1	Oman	1	19	15	7	40
5	KSA	3	111	18	2	108
7	Tunisia	6	20	14	12	21
9	Algeria	5	100	30	19	98
10	Morocco	14	42	12	10	43
13	Libya	4	132	41	18	114
17	Egypt	25	39	21	28	32
19	UAE	24	38	103	88	118
34	Bahrain	21	104	94	93	67
43	Jordan	26	87	51	53	44
58	Qatar	73	121	104	104	58
67	Sudan	121	72	22	118	9
68	Kuwait	48	131	61	59	50
94	Lebanon	89	92	29	54	8
122	Djibouti	117	133	100	109	130

. . . compared to 4 of the top 10 movers being Arab countries using 1970 as the base year, not a single Arab country is amongst the top 10 movers on HDI from 1990 onwards. However, three of the top movers in the earlier period, namely Oman, KSA and Tunisia, continue to make remarkable progress on HDI in the latter period, being placed amongst the top 20 movers, together with Morocco. Algeria demonstrates much slower progress in the second period, due to the effect of the prolonged internal strife the country experienced in the 1990s. Sudan, Kuwait, Lebanon and Djibouti, on the other hand, show the slowest rates of improvement in HDI since 1970. Djibouti also shows consistently low rankings in terms of progress on both income and non-income components of HDI and remains amongst the worst performers when one looks at the period since 1990. This is a clear reflection of the fundamental constraints it faces in its attempt to break out of a vicious cycle of misery that is typical of LDCs. The poor performance of Lebanon against a 1970 base is largely due to the negative impact of the long-running civil war on both economic prosperity and provision of quality public services.

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, p. 17.

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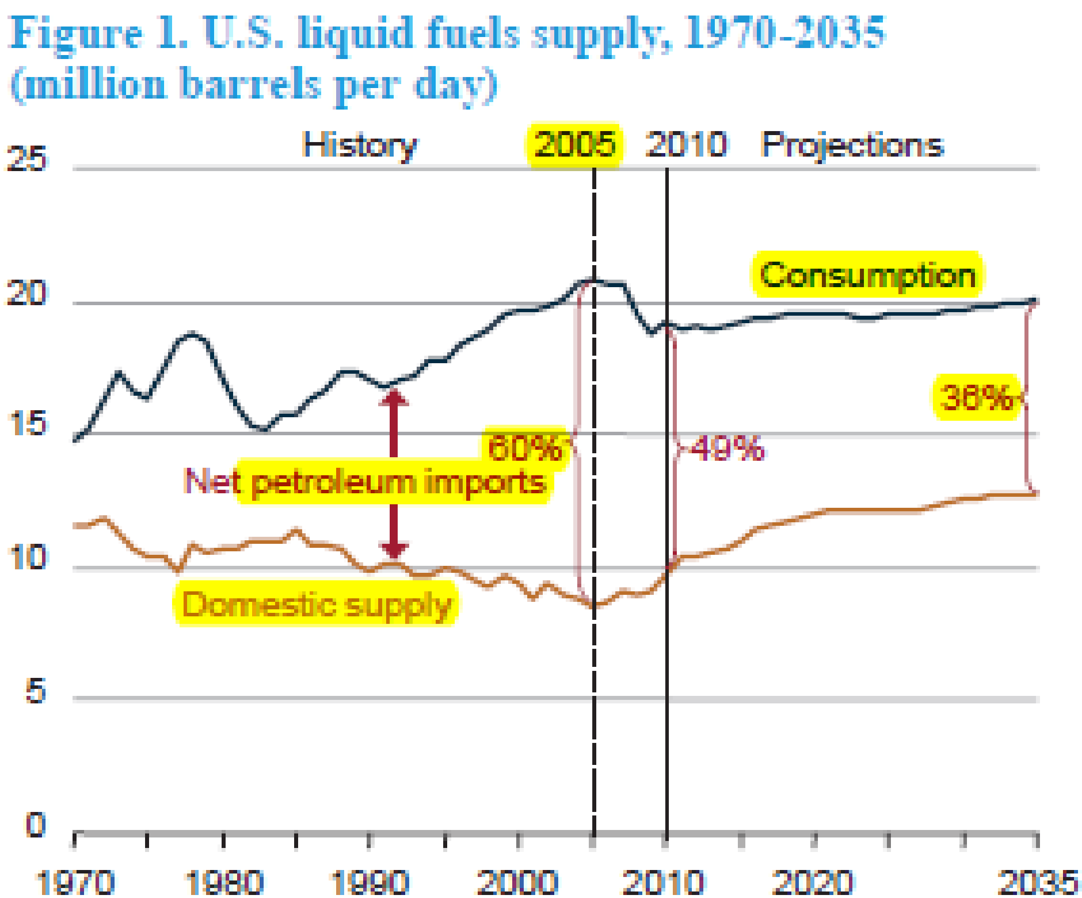
Figure 4

Continued US Strategic Dependence on Energy Imports



The net import share of total U.S. energy consumption in 2035 is 17 percent, compared with 24 percent in 2009. (The share was 29 percent in 2007, but it dropped considerably during the 2008-2009 recession.)

Much of the projected decline in the net import share of energy supply is accounted for by liquids.

Although U.S. consumption of liquid fuels continues to grow through 2035 in the Reference case, reliance on petroleum imports as a share of total liquids consumption decreases.
Total U.S. consumption of liquid fuels, including both fossil fuels and biofuels, rises from about 18.8 million barrels per day in 2009 to 21.9 million barrels per day in 2035 in the Reference case. The import share, which reached 60 percent in 2005 and 2006 before falling to 52 percent in 2009, falls to 41 percent in 2035

U.S. Energy Information Administration | Annual Energy Outlook 2012 Early Release Overview, January 2012, p.1.
http://www.eia.gov/forecasts/aeo/er/pdf/0383er(2012).pdf, Accessed February 3, 2012.

Setting the Stage - II

The Critical Importance of National Differences and the Problem of Perceptions

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Setting the Stage - II

- Differences outweigh common cultural and religious identity.
- Low global economic ranking except for petroleum sector – which produces major swings in income.
- Economic growth moderate compared to Africa, and Latin America but far below Asia.
- Limited numbers of truly poor in terms of basic food crises.
- Instability as much by perceptions and expectations as critical economic and social pressures.

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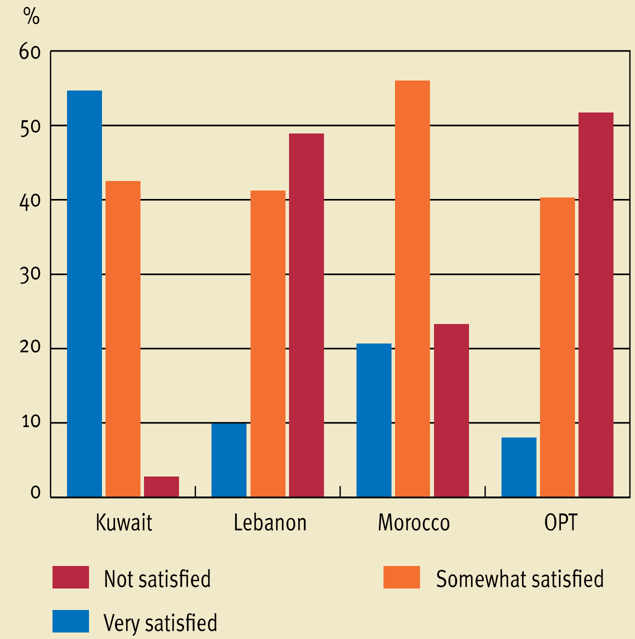
Satisfaction (Stability) vs. Security

Figure 5

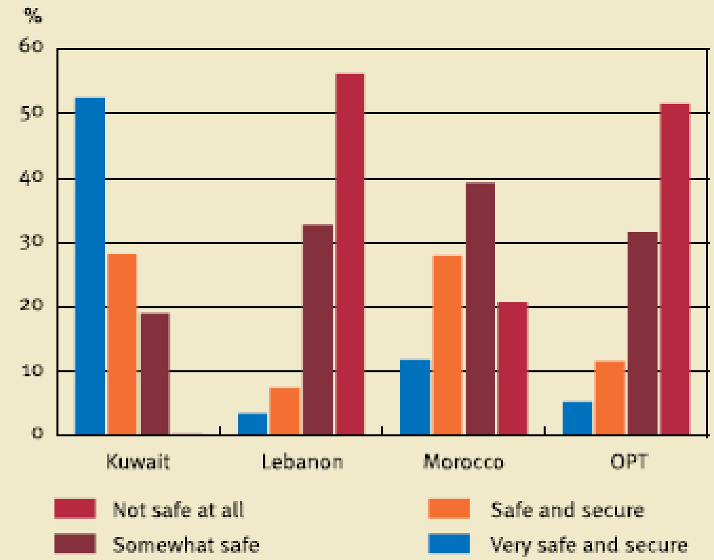
Satisfaction with the present situation



Responses from those sampled in the four countries represent three patterns of response which recur throughout. More than half of Kuwaitis were completely satisfied with their circumstances in terms of the main threats, whereas more than half polled in Morocco were moderately satisfied. In Lebanon and OPT, however, about a half of respondents were dissatisfied. This picture evidently reflects perceptions of the degree of human security in the four countries at the time the questionnaire was administered, that is, in the spring and winter of 2008.

Figure 6

How safe do citizens feel?



Do present conditions give citizens a sense of security? The figure above presents responses to this question in the four countries. Survey results place Kuwait at one end of the spectrum and Lebanon and the Occupied Palestinian Territory (OPT) at the other, with respondents from Morocco somewhere in between. More than half those sampled in Kuwait felt very safe, while more than one-fourth of them felt moderately safe. In Lebanon and OPT, by contrast, nearly half felt unsafe, whereas in Morocco, the majority of those sampled felt safe or somewhat safe, while one-fifth of those sampled did not feel safe. It may be noted that those who felt very safe made up a minority of little more than one-tenth of those in Morocco, and barely 5 per cent in OPT and Lebanon.

Source: Arab Development Report, 2009, p. 27.

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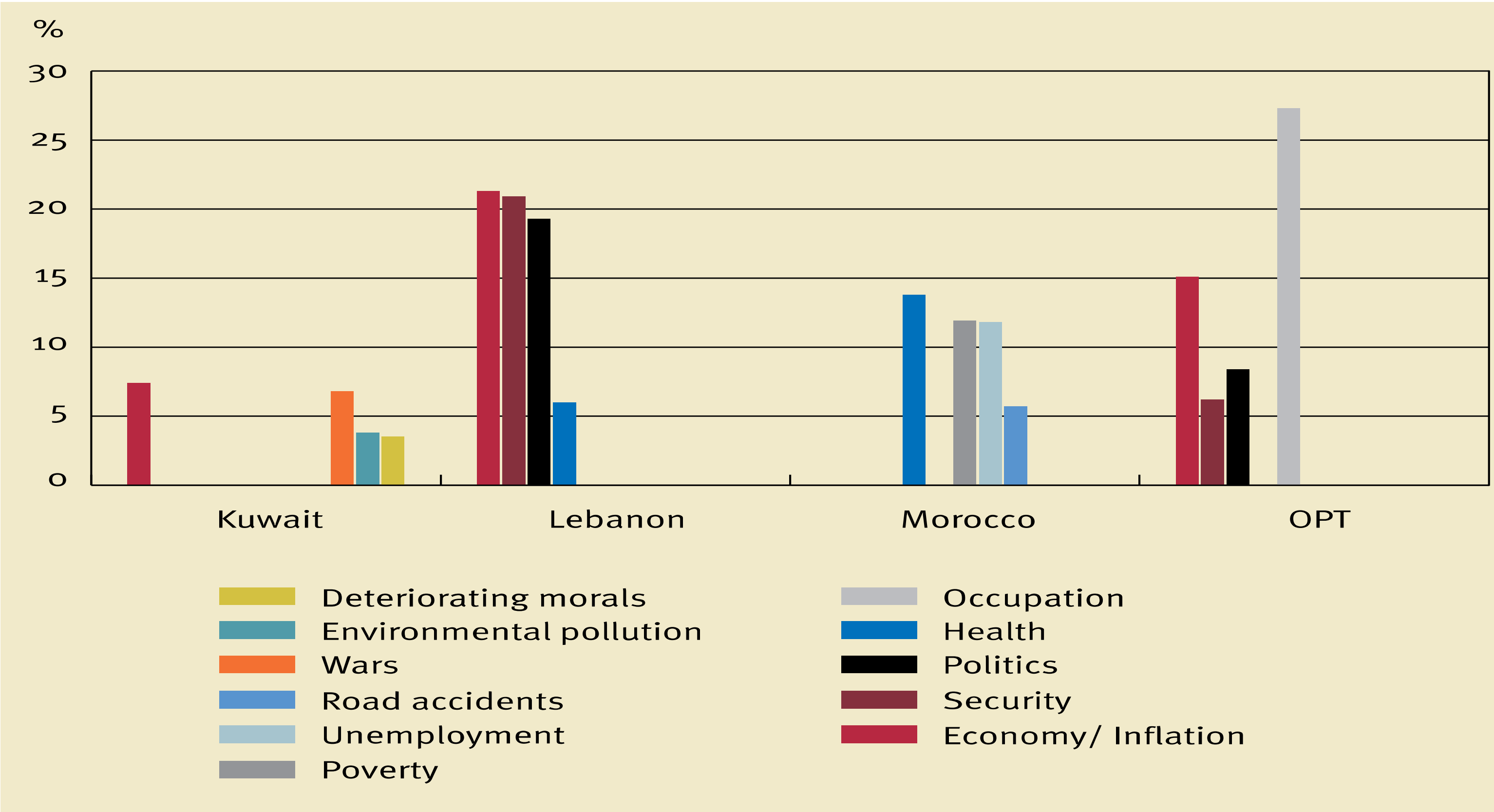
What Makes Citizens Feel Most Insecure?

Figure 7



To determine how secure Arab citizens feel, the respondents were asked to specify the most important sources of threat, for themselves personally. In all four countries, economic conditions were viewed as a threat to security. However, in the Occupied Palestinian Territory, foreign occupation ranked as the most serious threat, followed by deteriorating economic conditions, deteriorating political conditions, and a lack of personal security. In Lebanon, concern over the economy took first place, followed by a lack of personal security and deteriorating political conditions. In Morocco, by contrast, the sources of threat were less directly linked to political conditions. Instead, health conditions came first in importance, followed by poverty and unemployment, then traffic accidents. Economic threats and war or external threats were given first place by Kuwaiti respondents, followed by environmental pollution and deteriorating morals.

Poor nutrition did not figure directly among the most significant threats felt by citizens in the four countries although it may have been implied in references to poverty and unemployment, given that these latter phenomena reduce the ability to obtain food.

Source: Arab Development Report, 2009, p. 28.

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Perceived Threats to Security

(% of participants asked to consider up to 21 potential threats to human security, and choose whether or not they thought each one was indeed a threat in their context.)

Figure 8

Threats / Countries	Kuwait	Lebanon	Morocco	OPT
Environmental pollutants	91.2	77.8	74.9	..
Water shortages	73.5	80.5	76.9	82.3
Deterioration of agricultural land	..	..	..	78.4
Occupation and foreign influence	..	85.1	..	96.2
Governmental failure to protect citizens	..	87	..	86.9
Arbitrariness of government	..	80.1	..	..
Lack of social protection	..	73.4	..	71
Poor health services	..	80.9	72.3	73.4
Poor educational services	..	..	..	..
The spread of corruption	..	86.3	..	89.4
Slow legal procedures and difficulty in obtaining rights	..	73.2	..	73.7
Weak solidarity among members of society	..	70.2	..	..
Tense relations among different groups	..	80.8	..	83.7
Religious extremism	..	79.9	..	..
Disintegration of the family	..	74.7	..	75.2
Lack of access to basic services	..	81.1	..	75.4
Epidemics and communicable diseases	..	86.2	70	75.6
Unemployment	..	86.5	81.2	91
Poverty	..	86.4	86	90.6
Hunger	..	88.7	75.9	85.4
Assaults on persons and private property	..	89.1	..	80.4

Source: Arab Development Report, 2009, p. 26.

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Figure 9

Key Differences by Country

Country	Leader	Date of accession	Population (millions)	Population under 25 (% of total)	GDP per capita* USD '000	Wold ranking 2010		
						Democracy[1]	Corruption[2]	Press freedom[3]
Algeria	Abdulaziz Bouteflika	1999	35.9	47.5	8.2	125	105	141
Bahrain	King Hamad bin Essa Al-Khalifa	1999	1.2	43.9	24.0	122	48	153
Egypt	Muhammed Tantawi (acting)	2011	84.6	52.3	5.9	138	98	130
Iraq	Nuri Al-Maliki	2006	31.4	60.6	4.0	111	175	144
Jordan	King Abdullah II	1999	6.4	54.3	5.2	117	50	140
Kuwait	Sabah Al-Ahmed Al-Sabah	2006	3.5	37.7	40.6	114	54	115
Lebanon	Michel Suleyman	2008	4.3	42.7	13.4	86	127	115
Libya	Muammar Qadafi	1969	6.5	47.4	18.7	158	146	192
Morocco	King Mohammed VI	1999	32.4	47.7	4.7	116	85	146
Oman	Sultan Qaboos	1970	3.3	51.5	23.3	143	41	153
Palestinian Territories	Mahmoud Abbas/Ismail Haniyeh	2005/06	4.1	64.4	2.9	93	na	181
Qatar	Sheikh Hamad bin Khalifa Al-Thani	1995	1.7	33.8	66.9	137	19	146
Saudi Arabia	King Abdullah bin Abdulaziz Al-Saud	2005	27.1	50.8	22.9	160	50	178
Syria	Bashar Assad	2000	22.5	55.3	4.7	152	127	178
Tunisia	Mohamed Gannouchi	2011	10.4	42.1	8.6	144	59	186
UAE	Sheikh Khalifa bin Zayed Al-Nahyan	2004	6.7	31.0	27.2	148	28	153
Yemen	Ali Abdullah Saleh	1978	24.3	65.4	2.9	146	146	173
Peripheral Arab Countries								
Comoros	Ahmed Sambi	2006	0.7	57.4	1.1	127	154	102
Djibouti	Ismael Omar Guelleh	1999	0.9	57.2	2.3	126	91	159
Mauritania	Mohammed Ould Abdulaziz	2009	3.4	59.3	1.9	115	143	118
Somalia	Sheikh Sharif Ahmed	2009	10.1	63.5	0.6	Not ranked	178	181
Sudan	Omar Al-Bashir	1989	43.2	59.0	2.3	151	172	165

Source: Economist Intelligence Unit; The World Bank, Transparency International; Freedom House

Note: 2010 data except for Palestine (2008)

*PPP - Purchasing Power Parity; (1) out of 167; (2) out of 178; (3) out of 198; the lower the ranking the better

Population Growth

Demographics Threaten the Stability of Many MENA States

Demographic Pressures

- Massive population growth since 1950, and will continue through at least 2030.
- Matched by dislocation, hyperurbanization, and DP/IDP issues
- Broad pressure on agriculture at time need economies of scale and capital – not more farmers.
- Strain on all government services and infrastructure.
- Challenge of expectations, status as important as classic economic pressures.

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UNDP Estimate of Population Growth: 1970-2015

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

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

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

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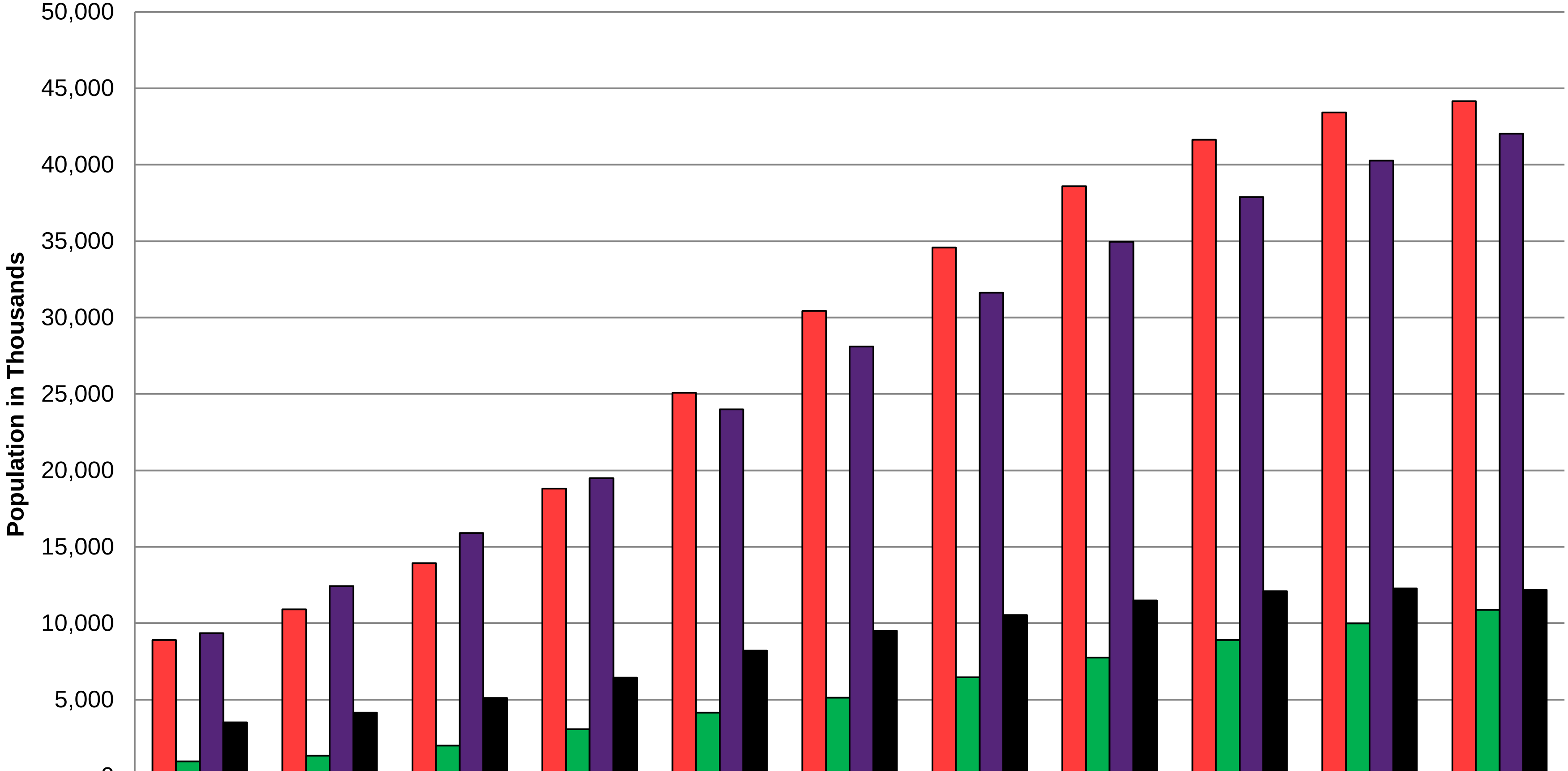
North African Demographic Pressure: 1950-2050

(In Millions)

Figure 11



	1950	1960	1970	1980	1990	2000	2010	2020	2030	2040	2050
Algeria	8,893	10,909	13,932	18,806	25,089	30,429	34,586	38,594	41,641	43,425	44,163
Libya	961	1,338	1,999	3,069	4,146	5,125	6,461	7,759	8,901	9,981	10,872
Morocco	9,343	12,423	15,909	19,487	24,000	28,113	31,627	34,956	37,887	40,267	42,026
Tunisia	3,517	4,149	5,099	6,443	8,207	9,508	10,525	11,494	12,086	12,284	12,180

Source: United States Census Bureau, International Data Base, Accessed January 2011.
http://www.census.gov/population/international/data/idb/informationGateway.php

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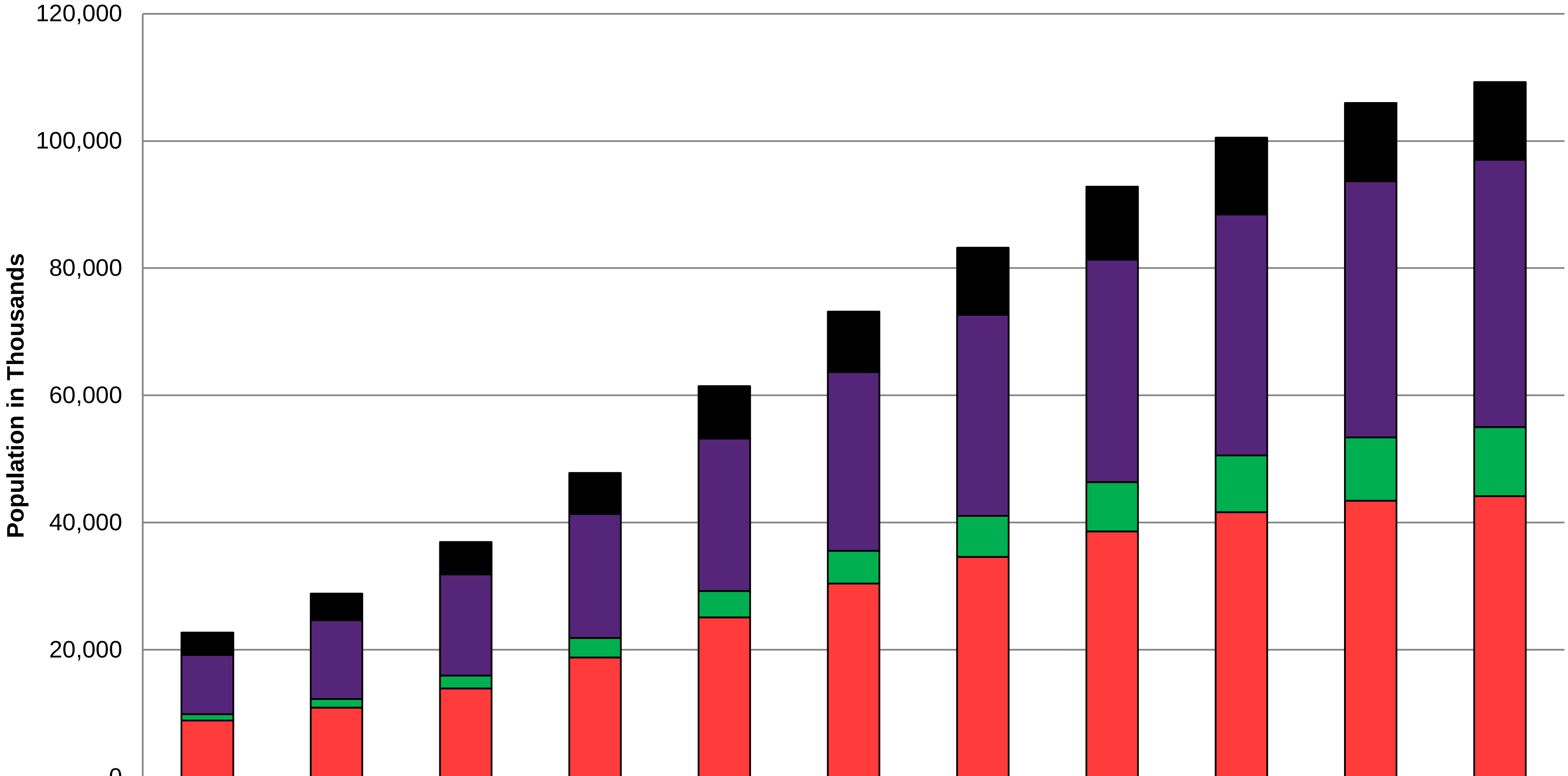
North African Demographic Pressure: 1950-2050

(In Millions)

Figure 12



	1950	1960	1970	1980	1990	2000	2010	2020	2030	2040	2050
Tunisia	3,517	4,149	5,099	6,443	8,207	9,508	10,525	11,494	12,086	12,284	12,180
Morocco	9,343	12,423	15,909	19,487	24,000	28,113	31,627	34,956	37,887	40,267	42,026
Libya	961	1,338	1,999	3,069	4,146	5,125	6,461	7,759	8,901	9,981	10,872
Algeria	8,893	10,909	13,932	18,806	25,089	30,429	34,586	38,594	41,641	43,425	44,163

Source: United States Census Bureau, International Data Base, Accessed January 2011.
http://www.census.gov/population/international/data/idb/informationGateway.php

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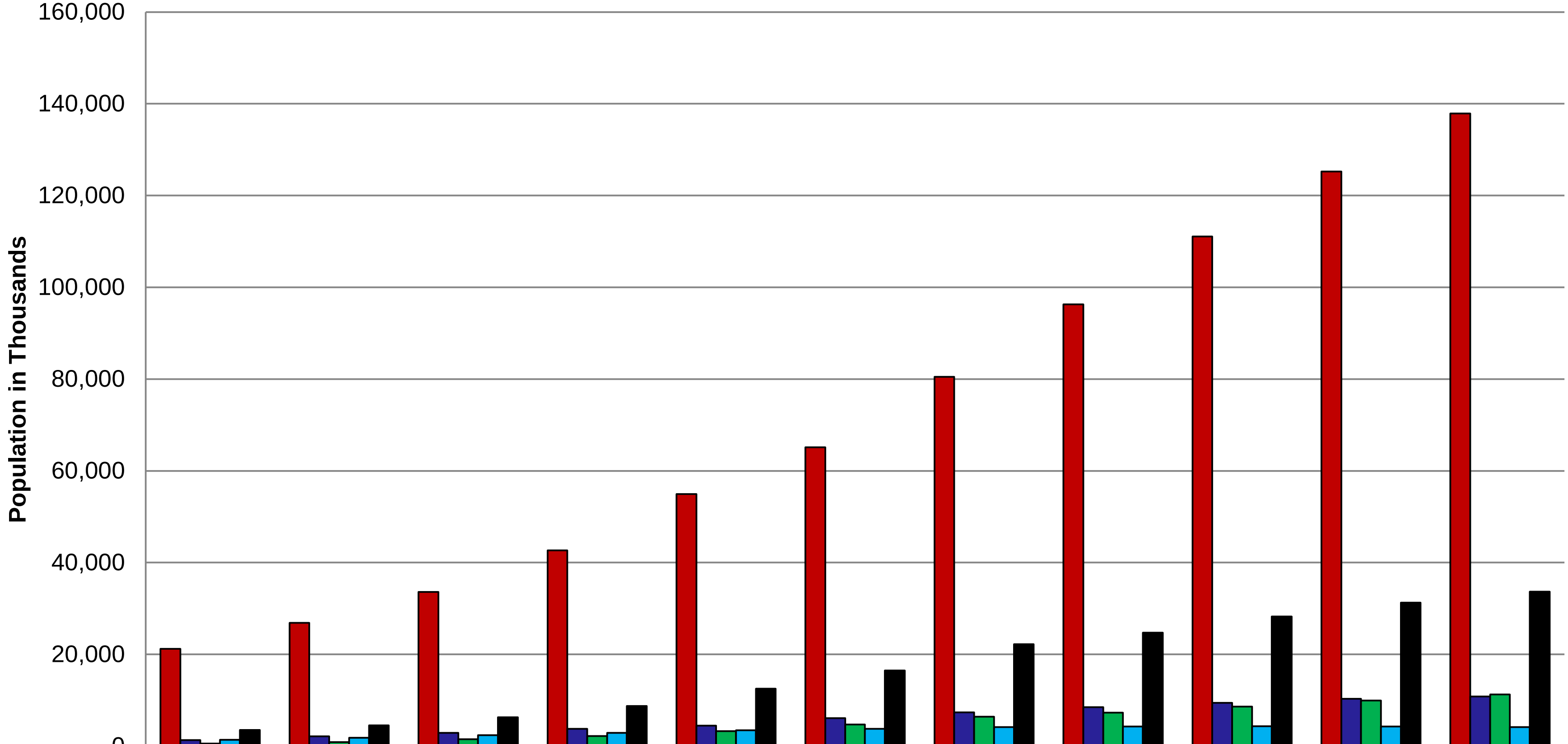
Arab-Israeli Demographic Pressure: 1950-2050

(In Millions)

Figure 13



	1950	1960	1970	1980	1990	2000	2010	2020	2030	2040	2050
Egypt	21,198	26,847	33,574	42,634	54,907	65,159	80,472	96,260	111,057	125,242	137,873
Israel	1,286	2,141	2,903	3,737	4,478	6,115	7,354	8,479	9,459	10,280	10,828
Jordan	561	849	1,503	2,163	3,267	4,688	6,407	7,278	8,611	9,954	11,243
Lebanon	1,364	1,786	2,383	2,899	3,440	3,791	4,125	4,243	4,335	4,298	4,155
Syria	3,495	4,533	6,258	8,752	12,500	16,471	22,198	24,744	28,224	31,257	33,658

Source: United States Census Bureau, International Data Base, Accessed January 2011.
http://www.census.gov/population/international/data/idb/informationGateway.php

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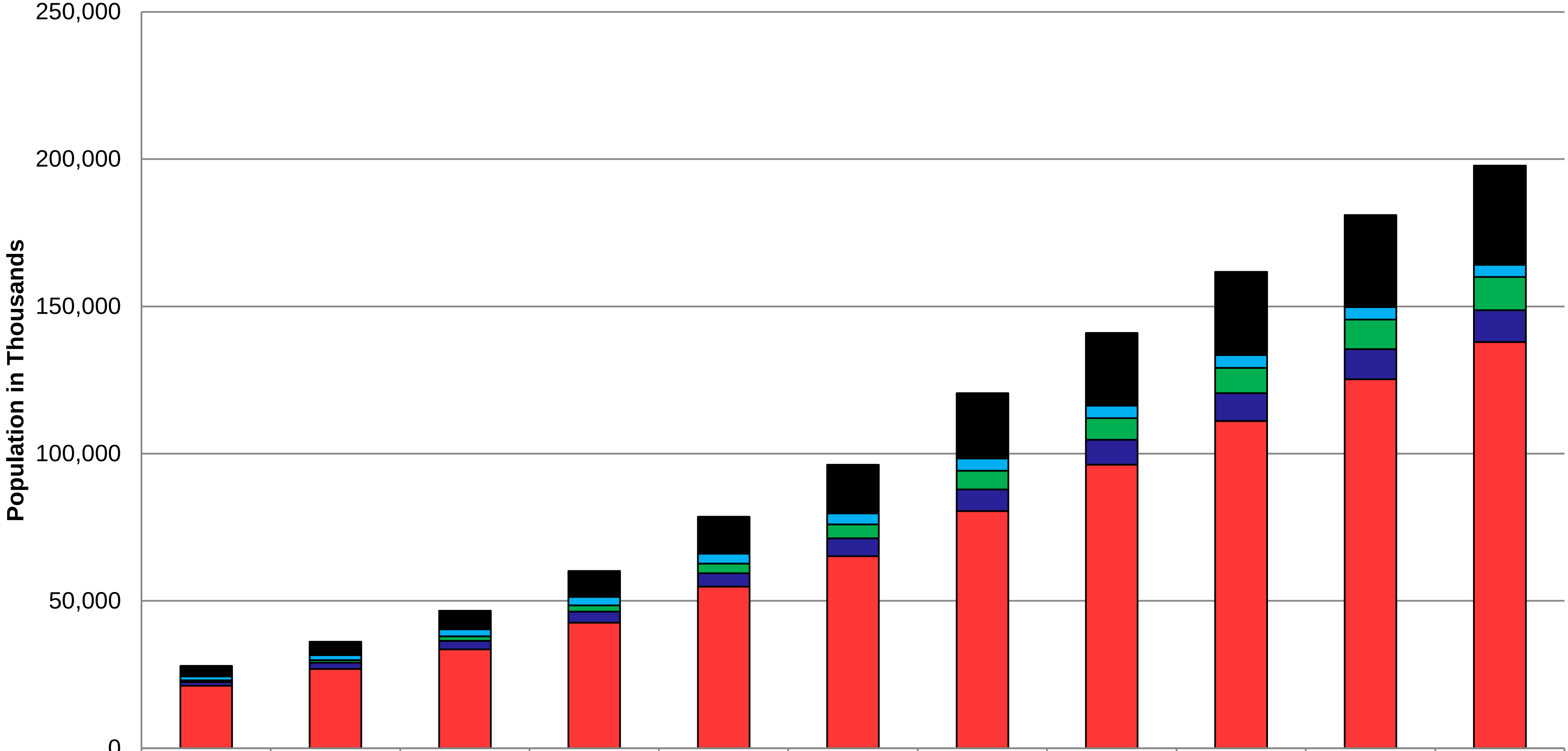
Arab-Israeli Demographic Pressure: 1950-2050

(In Millions)

Figure 14



	1950	1960	1970	1980	1990	2000	2010	2020	2030	2040	2050
Syria	3,495	4,533	6,258	8,752	12,500	16,471	22,198	24,744	28,224	31,257	33,658
Lebanon	1,364	1,786	2,383	2,899	3,440	3,791	4,125	4,243	4,335	4,298	4,155
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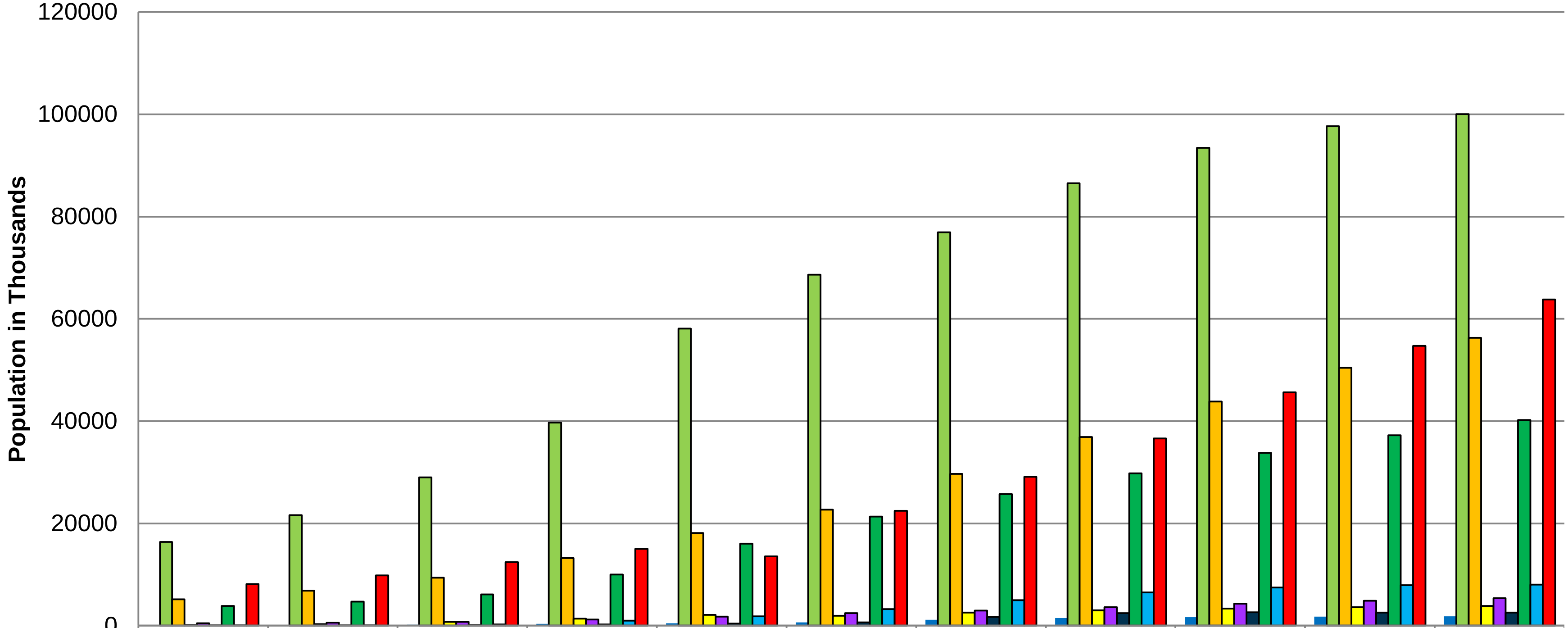
Egypt	21,198	26,847	33,574	42,634	54,907	65,159	80,472	96,260	111,057	125,242	137,873

Source: United States Census Bureau, International Data Base, Accessed January 2011.
http://www.census.gov/population/international/data/idb/informationGateway.php

Gulf Demographic Pressure: 1950-2050

(In Millions)

Figure 15



	1950	1960	1970	1980	1990	2000	2010	2020	2030	2040	2050
Bahrain	115	157	220	348	506	655	1,180	1,505	1,639	1,758	1,847
Iran	16,357	21,600	28,994	39,709	58,100	68,632	76,923	86,543	93,458	97,685	100,045
Iraq	5,163	6,822	9,414	13,233	18,140	22,679	29,672	36,889	43,831	50,459	56,316
Kuwait	145	292	748	1,370	2,131	1,972	2,543	2,994	3,331	3,623	3,863
Oman	489	601	783	1,185	1,794	2,432	2,968	3,635	4,305	4,879	5,402
Qatar	25	45	113	229	433	640	1,719	2,444	2,596	2,550	2,559
Saudi Arabia	3,860	4,718	6,109	10,022	16,061	21,312	25,732	29,819	33,825	37,250	40,251
UAE	72	103	249	1,000	1,826	3,219	4,976	6,495	7,484	7,948	8,019
Yemen	8,150	9,829	12,431	15,044	13,568	22,461	29,121	36,644	45,665	54,717	63,795

Source: United States Census Bureau, International Data Base, Accessed January 2011.
http://www.census.gov/population/international/data/idb/informationGateway.php

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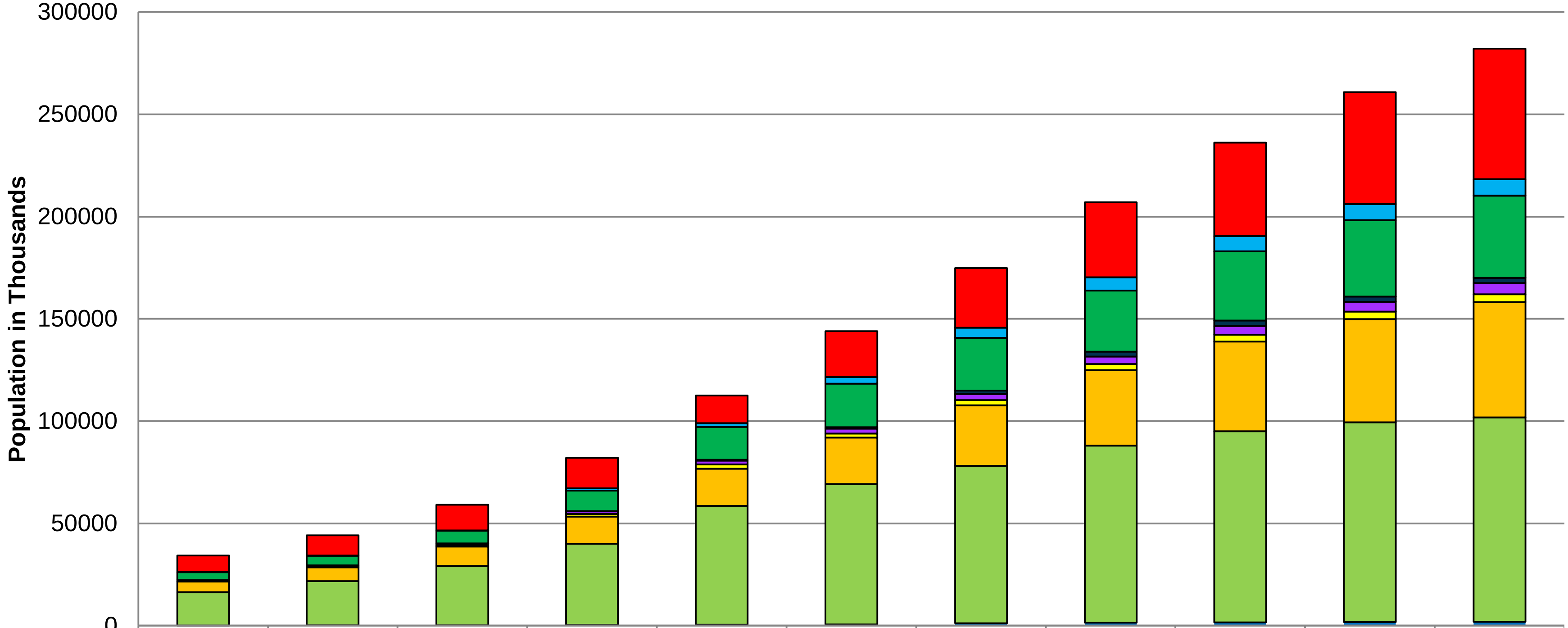
Gulf Demographic Pressure: 1950-2050

(In Millions)

Figure 16



	1950	1960	1970	1980	1990	2000	2010	2020	2030	2040	2050
Yemen	8,150	9,829	12,431	15,044	13,568	22,461	29,121	36,644	45,665	54,717	63,795
UAE	72	103	249	1,000	1,826	3,219	4,976	6,495	7,484	7,948	8,019
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Kuwait	145	292	748	1,370	2,131	1,972	2,543	2,994	3,331	3,623	3,863
Iraq	5,163	6,822	9,414	13,233	18,140	22,679	29,672	36,889	43,831	50,459	56,316
Iran	16,357	21,600	28,994	39,709	58,100	68,632	76,923	86,543	93,458	97,685	100,045
Bahrain	115	157	220	348	506	655	1,180	1,505	1,639	1,758	1,847

Source: United States Census Bureau, International Data Base, Accessed January 2011.
http://www.census.gov/population/international/data/idb/informationGateway.php

Estimates of Foreign Nationals as a Percentage of the Labor Force

Figure 17

Figure 18

Foreign Nationals in the Labor Force	% of Labor Force Filled by Foreign Nationals	% of Population Filled by Foreign Nationals	Estimates of Foreign Nationals in the Labor Force	Labor Force Estimates
Lebanon*	40	19	1,000,000	2,481,000
Bahrain	44	19	295,900	672,500
Kuwait	60	50	1,345,800	2,243,000
Oman*	60	19	581,280	968,800
Saudi Arabia	80	21	6,104,000	7,630,000
UAE*	85	74	4,111,000	3,500,000

Source: CIA World Factbook, Accessed February 1, 2012.
https://www.cia.gov/library/publications/the-world-factbook/index.html

Unemployment and Underemployment are Broad Challenges

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

Perceptions of Unemployment in MENA

Percent Unemployed and Looking for Work

Taking into account the average size of households, answers in the affirmative to the first question suggest unemployment rates ranging between 30-35 per cent in Morocco and the Occupied Palestinian Territory, and 15-20 per cent in Lebanon.

Figure 19

Figure 20

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

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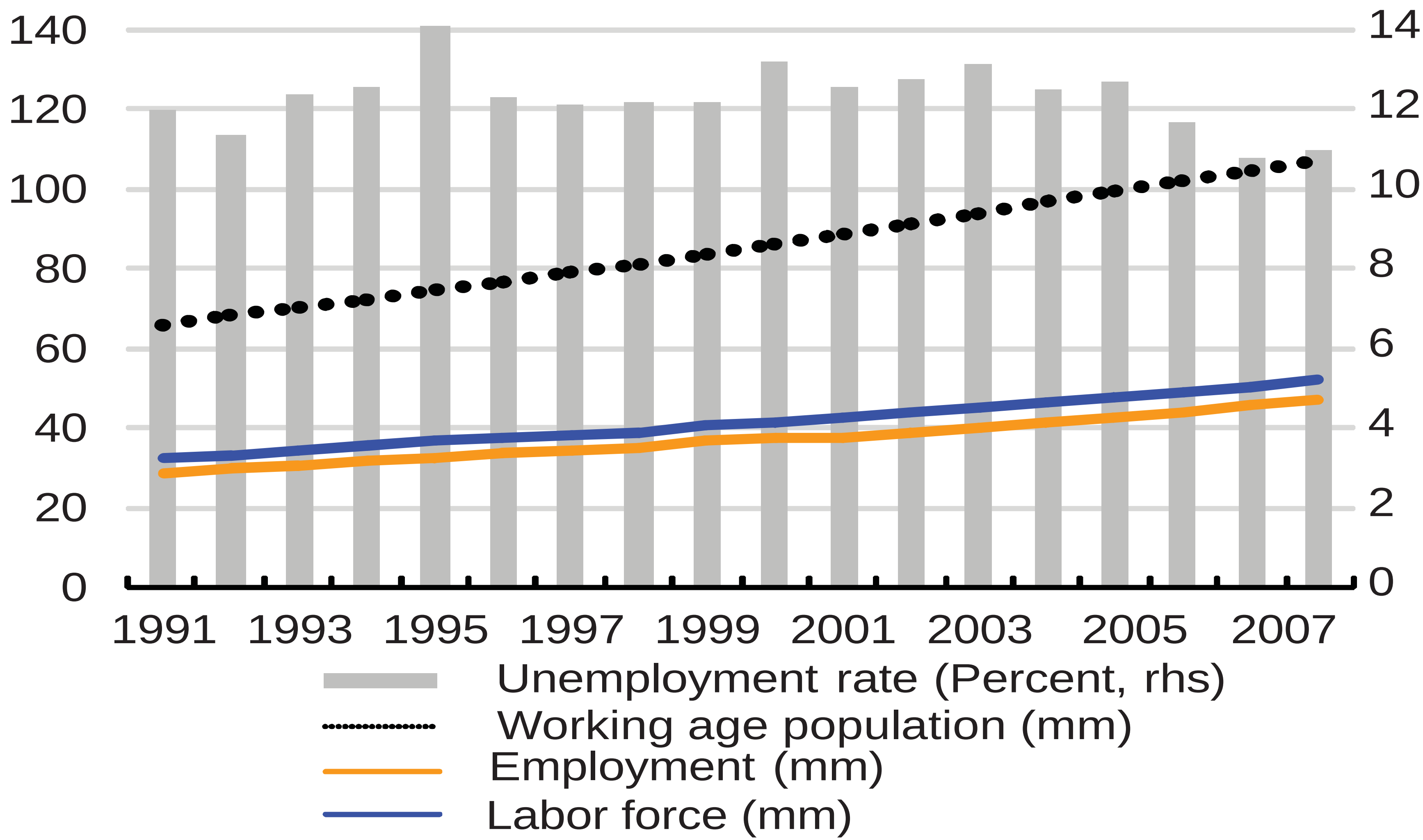
MENA Demographics and Unemployment

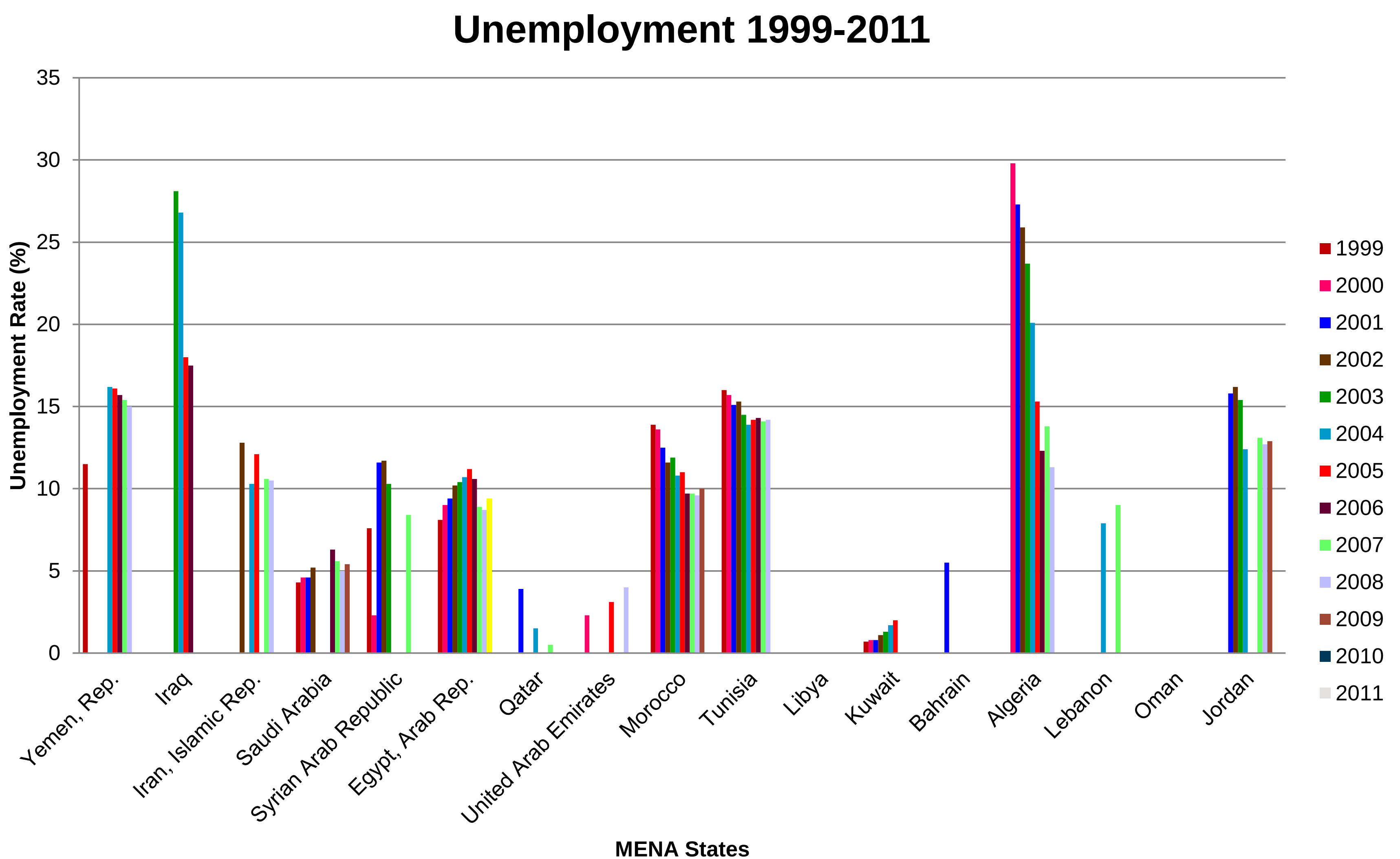
Figure 10



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

Official Unemployment Rates

Figure 21



Source: The World Bank, dataBank, Accessed 1/26/2012

http://databank.worldbank.org/ddp/home.do?Step=3&id=4

Still Excluding Women From Productive Labor

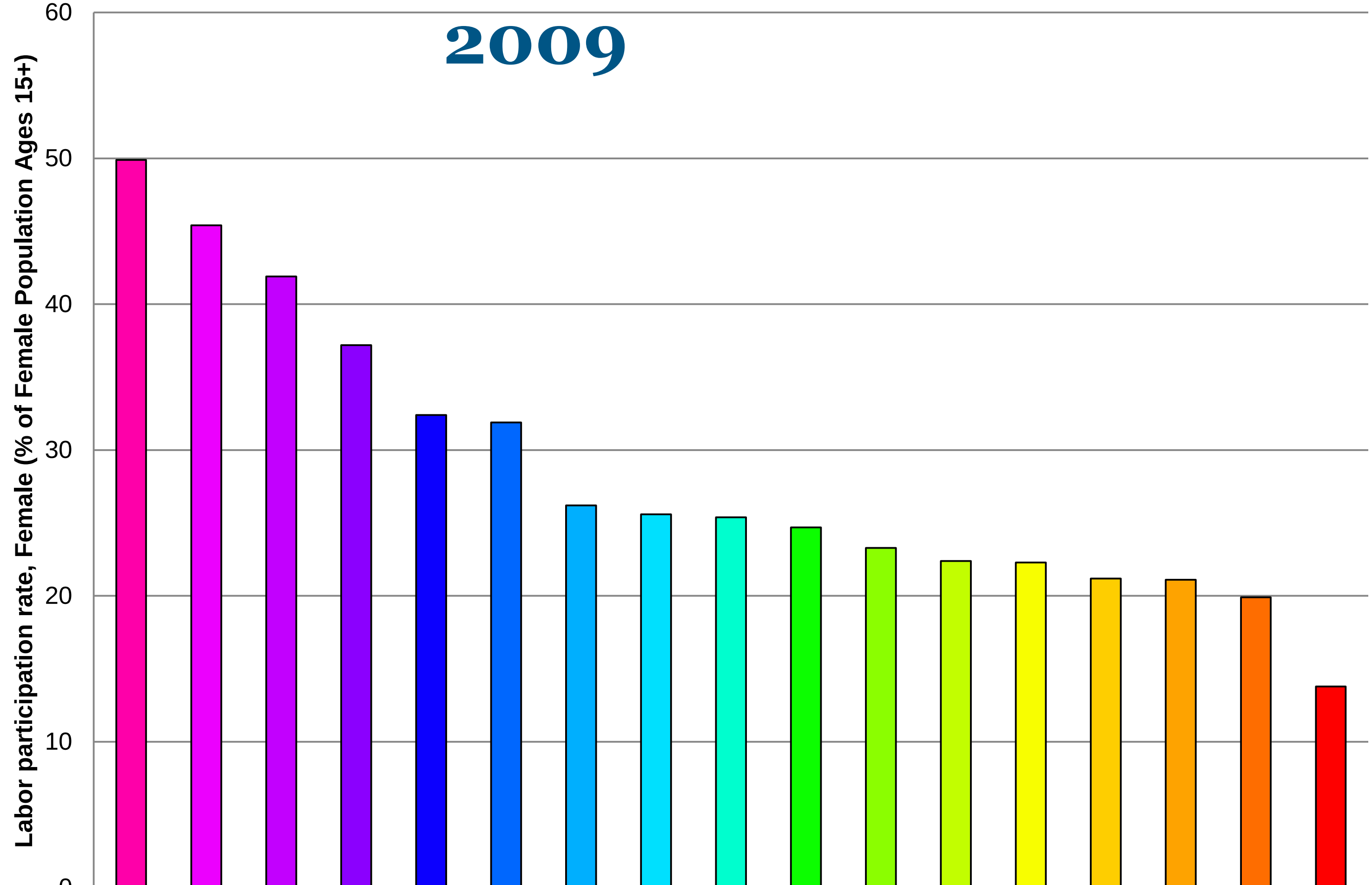
Country/ Region	TOTAL						MALE						FEMALE					
	1981	1991	2000	2005	2008	2009	1981	1991	2000	2005	2008	2009	1981	1991	2000	2005	2008	2009
Algeria	44.9	49.5	55.2	57.1	58.3	58.5	70.6	75.7	79.0	79.3	79.9	79.6	19.5	23.5	31.3	34.7	36.6	37.2
Bahrain	61.4	65.3	65.2	64.6	63.9	63.8	86.9	88.2	86.2	85.8	85.2	85.0	18.6	29.2	33.8	33.0	32.2	32.4
Comoros	75.3	75.9	77.0	78.4	79.3	79.6	87.1	86.9	83.8	84.8	85.5	85.4	63.8	65.1	70.1	72.2	73.1	73.7
Djibouti	64.2	66.4	68.8	69.6	70.0	70.1	80.8	81.5	81.2	79.8	79.1	78.7	48.1	51.7	56.6	59.4	61.1	61.5
Egypt	51.5	50.4	48.9	48.0	47.8	48.8	74.3	74.6	74.1	73.3	73.0	75.3	29.0	26.4	23.8	22.8	22.8	22.4
Iraq	41.7	41.8	41.6	41.5	41.4	41.3	72.8	73.1	71.0	69.6	69.4	68.9	9.9	11.1	12.6	13.4	13.3	13.8
Jordan	42.4	45.9	49.5	48.9	49.8	49.3	70.4	72.1	75.2	74.1	74.8	73.9	12.6	16.7	21.6	22.1	23.4	23.3
KSA	47.2	53.3	53.9	54.8	54.6	54.5	75.0	79.8	79.7	80.3	79.9	79.8	9.8	14.6	17.6	19.8	20.8	21.2
Kuwait	58.1	64.4	70.4	69.4	68.4	68.5	80.5	82.2	85.0	83.4	82.8	82.5	22.2	36.9	44.3	45.2	44.3	45.4
Lebanon	41.8	43.3	44.8	45.3	45.2	46.1	69.7	70.8	71.6	71.1	70.3	71.5	15.3	18.1	20.0	21.2	21.8	22.3
Libya	46.2	46.9	50.5	52.3	52.2	52.8	73.6	74.0	75.5	77.8	78.4	78.9	12.0	15.3	22.7	24.3	23.8	24.7
Mauritania	66.5	67.1	68.5	69.5	69.9	70.0	81.9	81.9	81.5	81.3	81.2	81.0	51.6	52.7	55.6	57.6	58.5	59.0
Morocco	52.5	52.3	53.4	52.3	52.4	52.3	81.4	81.2	80.7	79.9	80.0	80.1	24.3	24.4	27.5	26.2	26.5	26.2
Oman	52.2	56.3	57.9	56.5	55.6	55.7	78.5	80.8	79.2	77.9	76.9	76.9	20.4	18.9	23.4	24.7	24.8	25.4
Qatar	71.3	80.1	75.5	82.2	83.8	84.3	90.9	94.5	92.4	92.5	92.8	93.0	25.7	41.4	36.9	45.9	48.2	49.9
Somalia	69.7	71.0	71.3	70.6	70.3	70.3	84.7	84.0	84.7	84.6	84.6	84.7	55.3	58.4	58.4	57.1	56.5	56.5
Sudan	58.0	52.1	52.0	52.3	52.4	52.3	85.4	77.5	75.1	74.5	73.9	73.9	31.0	26.9	28.9	30.1	30.9	30.8
Syria	46.0	50.2	50.3	49.6	50.6	50.4	79.6	81.4	80.1	78.9	80.1	79.5	12.5	19.0	20.3	20.0	21.0	21.1
Tunisia	49.6	48.2	48.1	47.7	48.1	48.0	79.7	75.2	72.3	70.6	70.9	70.6	19.2	21.1	23.8	24.8	25.5	25.6
UAE	75.0	73.1	75.6	76.8	77.6	77.6	94.5	91.6	91.3	91.3	92.0	92.1	16.8	26.2	34.2	39.3	41.8	41.9
Yemen	44.6	45.0	45.4	46.0	46.6	46.8	73.7	74.2	73.3	73.1	73.4	73.5	17.0	16.2	17.2	18.5	19.5	19.9
GCC	52.2	57.5	59.1	60.3	60.4	60.4	78.8	82.1	82.3	82.8	82.7	82.7	12.9	18.7	22.4	24.9	25.9	26.4
LDC	57.8	54.0	53.6	53.8	53.9	53.9	82.7	77.9	76.1	75.7	75.3	75.4	33.6	30.4	31.1	31.9	32.4	32.5
Maghreb	48.8	50.3	53.2	53.7	54.3	54.4	76.6	77.7	78.5	78.3	78.6	78.6	21.1	23.0	28.2	29.4	30.4	30.5
Mashreq	48.4	48.4	47.6	46.9	47.0	47.5	74.3	74.9	74.3	73.4	73.3	74.5	22.7	22.0	21.0	20.6	20.8	20.6
AC	50.8	51.0	51.6	51.7	51.9	52.2	77.1	77.2	76.8	76.4	76.4	76.9	23.9	23.8	25.3	25.7	26.3	26.3
EAP	76.8	76.9	75.3	74.5	70.7	71.2	86.1	84.5	83.4	81.3	80.2	80.3	67.2	69.0	67.0	65.1	64.5	64.4
ECA	66.5	64.0	58.9	58.4	59.3	58.9	77.0	74.0	68.8	68.1	69.0	68.5	57.4	55.1	50.2	49.8	50.7	50.5
LAC	58.8	61.7	63.4	64.8	65.6	65.5	81.4	82.2	80.6	80.3	80.3	79.9	36.8	41.8	46.9	50.0	51.7	51.8
SAS	61.0	60.8	59.1	58.8	58.9	58.8	86.3	84.4	82.7	82.1	81.5	81.6	33.4	35.4	34.1	34.2	35.1	34.9
SSA	70.3	70.2	70.9	71.3	71.5	71.8	82.5	81.9	81.3	81.1	81.1	81.1	58.4	58.9	60.8	61.9	62.2	62.7
DR	68.9	69.0	67.5	67.2	65.9	66.1	84.3	82.9	81.4	80.3	79.8	79.8	53.3	54.8	53.4	53.0	53.3	53.2

Source: Kilmnet, ILO

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, pp. 139.

Female Labor Participation Rate 2009

Figure 22



	Qatar	Kuwait	United Arab Emirates	Algeria	Bahrain	Iran, Islamic Rep.	Morocco	Tunisia	Oman	Libya	Jordan	Egypt, Arab Rep.	Lebanon	Saudi Arabia	Syrian Arab Republic	Yemen, Rep.	Iraq
Female Labor Participation Rate 2009	49.9	45.4	41.9	37.2	32.4	31.9	26.2	25.6	25.4	24.7	23.3	22.4	22.3	21.2	21.1	19.9	13.8

The World Bank, dataBank, Accessed 1/25/2012.
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

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

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

"Youth Bulge"

- Breakdown in education quality and relevance.
- Extremely young populations with major lag in jobs, marriage, and housing.
- Low expectations for the future.
- Closing windows of security and state sector employment.
- Major problems in saving and in funding business.
- Pressure to leave the land.
- Disguised unemployment.
- Cutting edge of ethnic, sectarian, and tribal discrimination, corruption, nepotism, and favoritism.

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Youth and The Unemployment Challenge

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

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

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

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

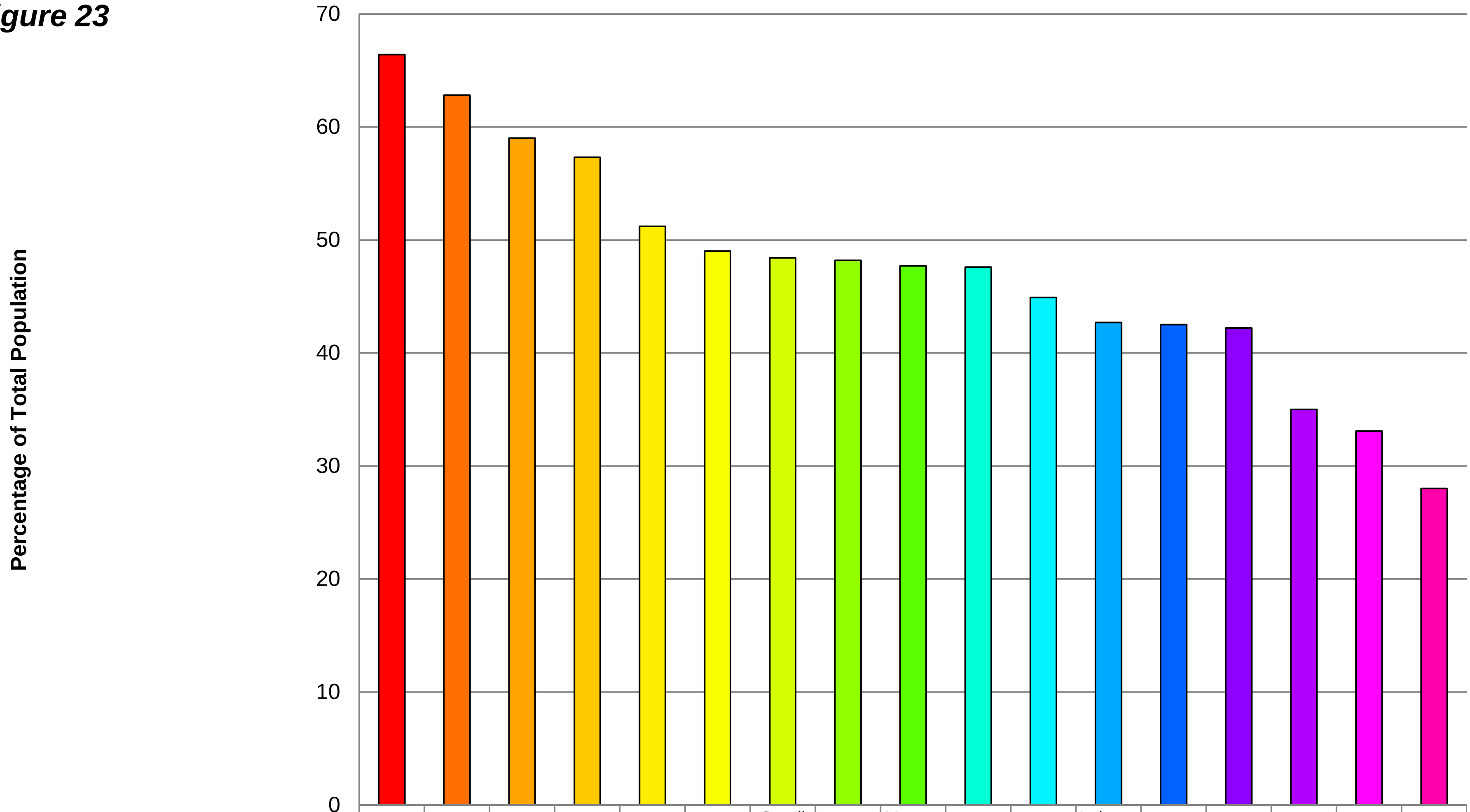
Country/ Region	Base Yr	Latest Yr	Total		Male		Female	
			Base	Latest	Base	Latest	Base	Latest
Algeria	2001	2008	47.8	23.8	48.8	23.5	49.9	25.4
Bahrain	1991	2001	25.4	20.1	22.4	17.2	33.9	27.0
Egypt	1998	2007	23.1	24.8	15.8	17.2	42.8	47.9
KSA	2002	2008	28.1	29.3	25.2	24.1	39.1	50.0
Kuwait	1995	2005	13.2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

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

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

Percentage of the Population Under 25

Figure 23



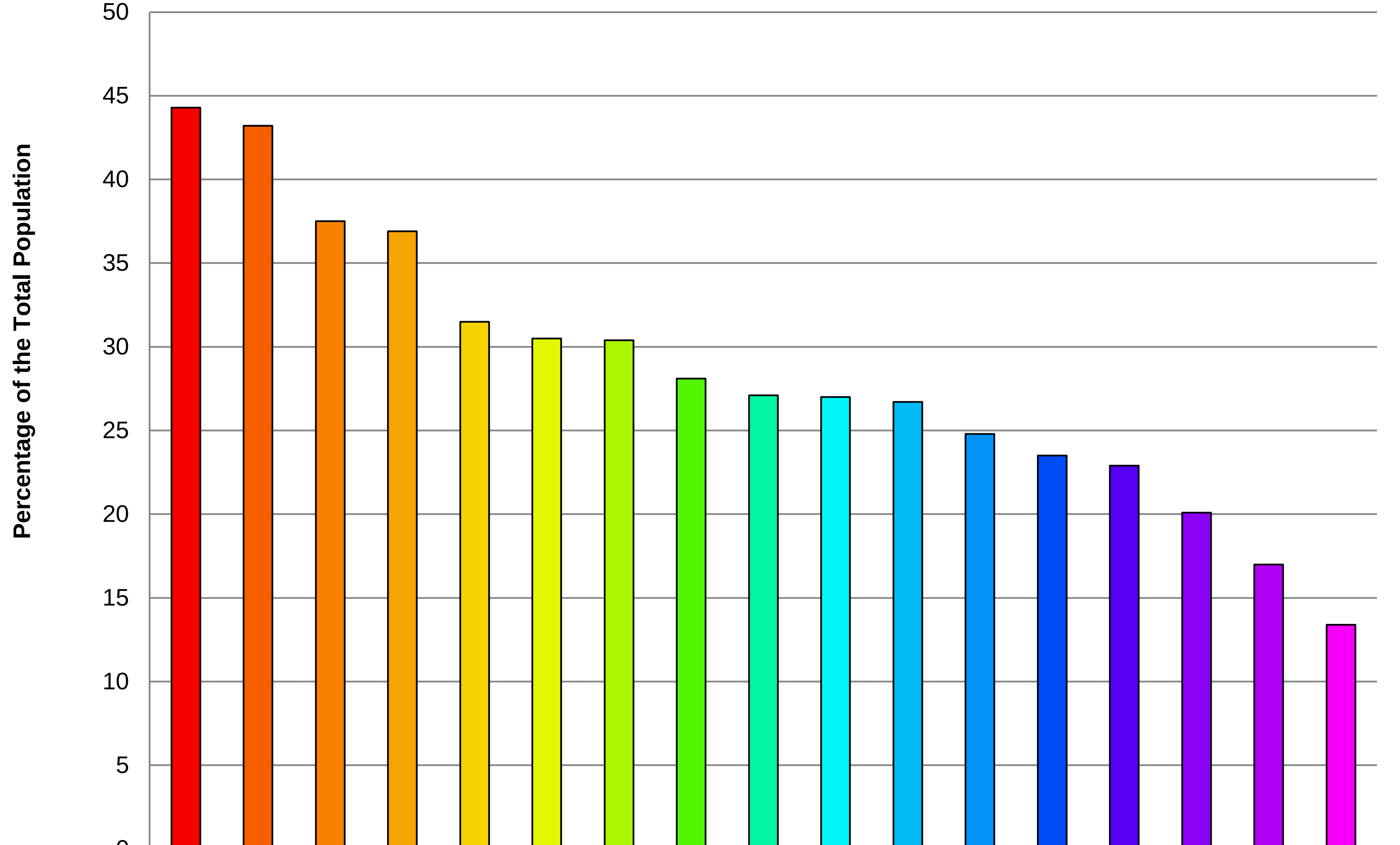
	Yemen	Iraq	Jordan	Syria	Egypt	Oman	Saudi Arabia	Libya	Morocco	Algeria	Iran	Lebanon	Tunisia	Kuwait	Bahrain	UAE	Qatar
Percentage of Population Under 25	66.4	62.8	59	57.3	51.2	49	48.4	48.2	47.7	47.6	44.9	42.7	42.5	42.2	35	33.1	28

Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, *World Population Prospects: The 2010 Revision*, http://esa.un.org/unpd/wpp/index.htm

Population of 0-14 years of Age

(In Percent)

Figure 24



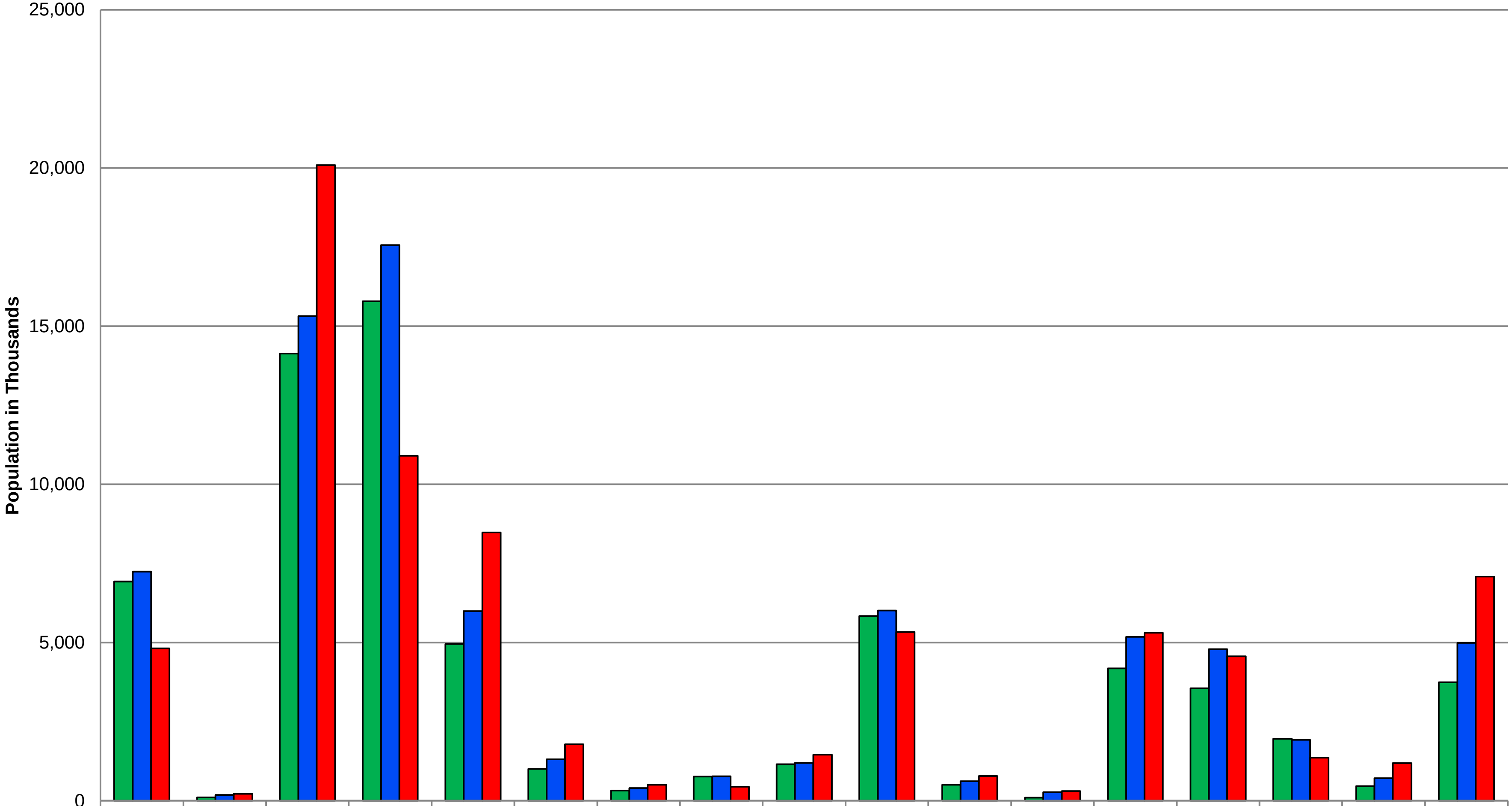
	Yemen	Iraq	Jordan	Syria	Egypt	Libya	Saudi Arabia	Morocco	Oman	Algeria	Kuwait	Lebanon	Tunisia	Iran	Bahrain	UAE	Qatar
Total Population 0-14 Years of Age	44.3	43.2	37.5	36.9	31.5	30.5	30.4	28.1	27.1	27	26.7	24.8	23.5	22.9	20.1	17	13.4

Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, *World Population Prospects: The 2010 Revision*, http://esa.un.org/unpd/wpp/index.htm

MENA Youth (Ages 15-24) Through 2050

(In Thousands)

Figure 25



	Algeria	Bahrain	Egypt	Iran	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudi Arabia	Syria	Tunisia	UAE	Yemen
2000	6,925	109	14,135	15,787	4,956	1,009	321	764	1,157	5,838	502	98	4,184	3,550	1,964	460	3,744
2010	7,241	189	15,321	17,560	5,991	1,307	400	774	1,201	6,011	617	269	5,184	4,794	1,921	709	4,990
2050	4,814	222	20,091	10,902	8,479	1,784	503	448	1,457	5,335	781	303	5,314	4,566	1,360	1,186	7,085

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

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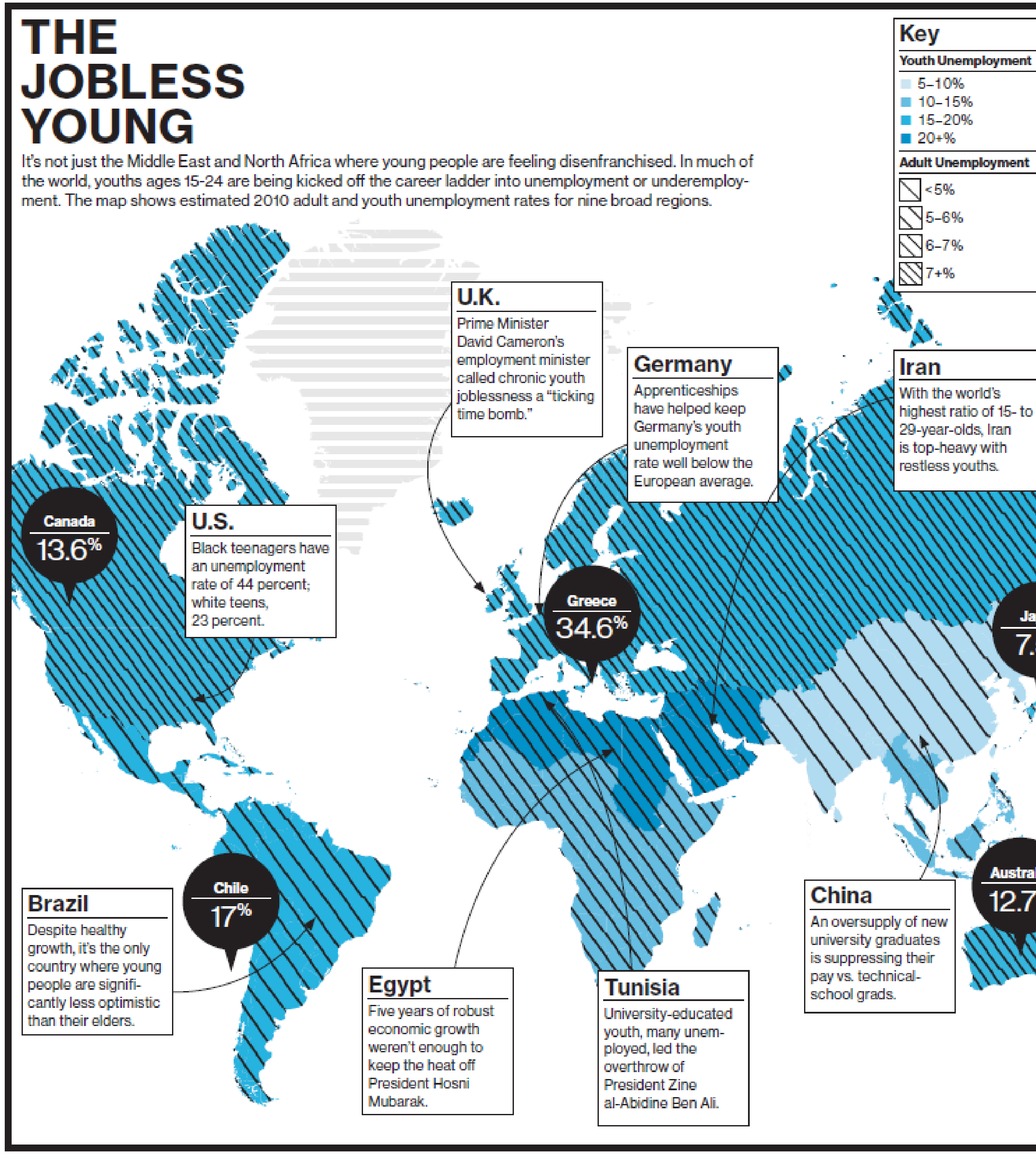
Figure 26



Source: Bloomberg News

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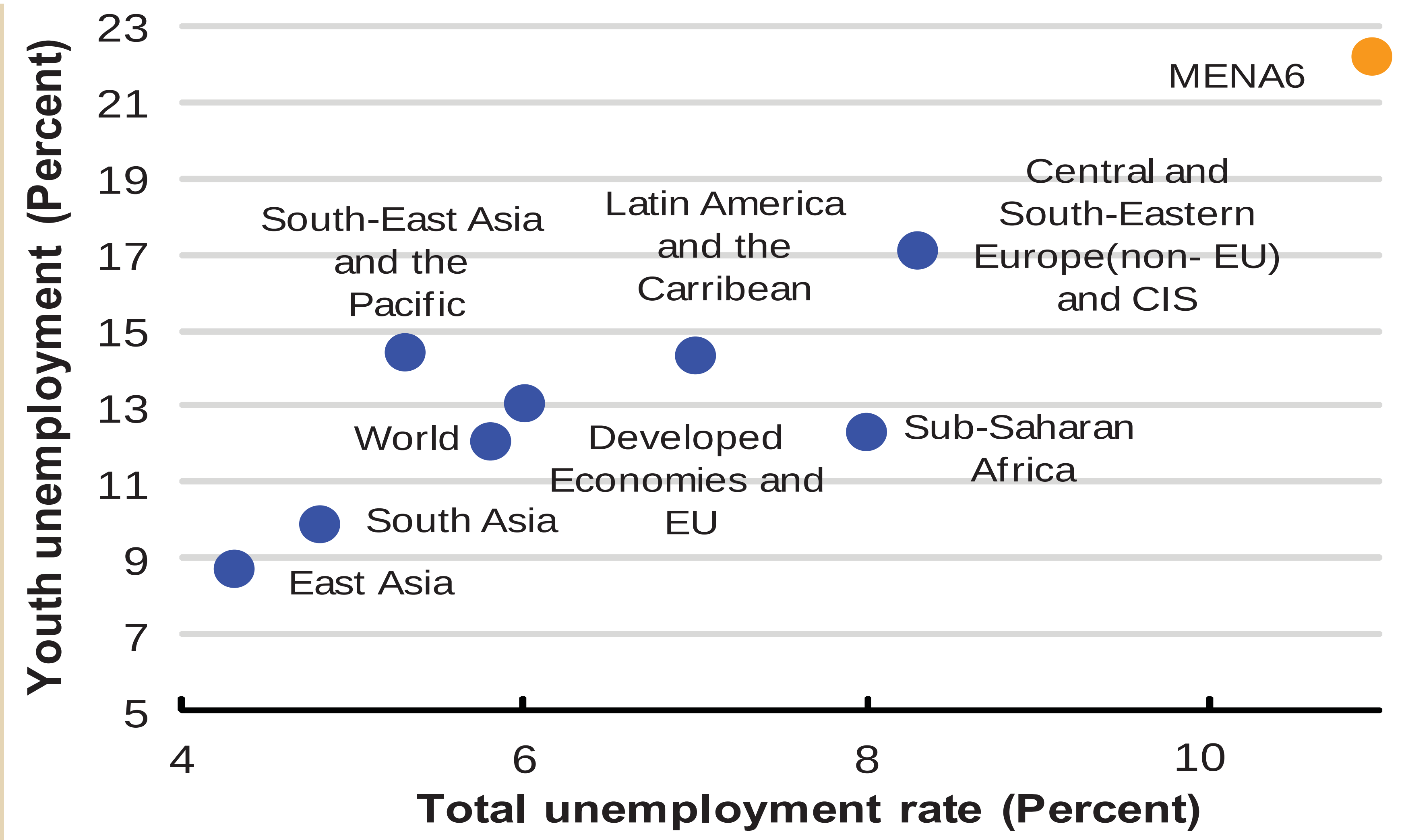
Total and Youth Unemployment Rates by Region (2008)

Figure 27

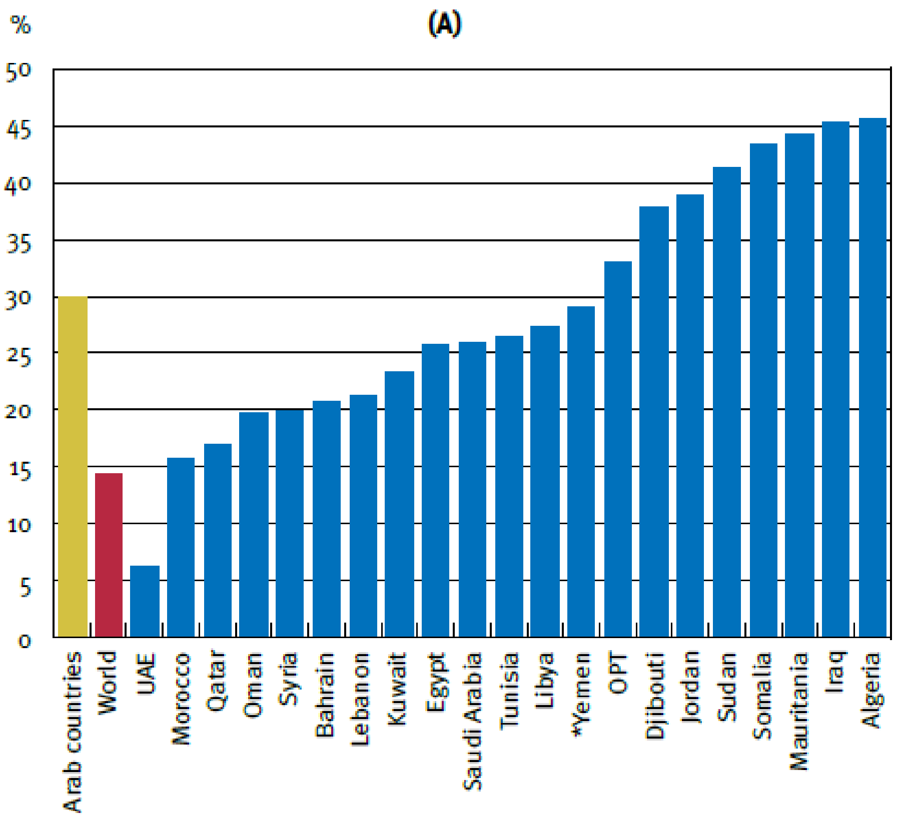


Source: IMF, *World Economic and Financial Surveys, Regional Economic Outlook, Middle East and Central Asia*, October 2010, *p. 38*

Youth (0-25) Unemployment in MENA in 2007

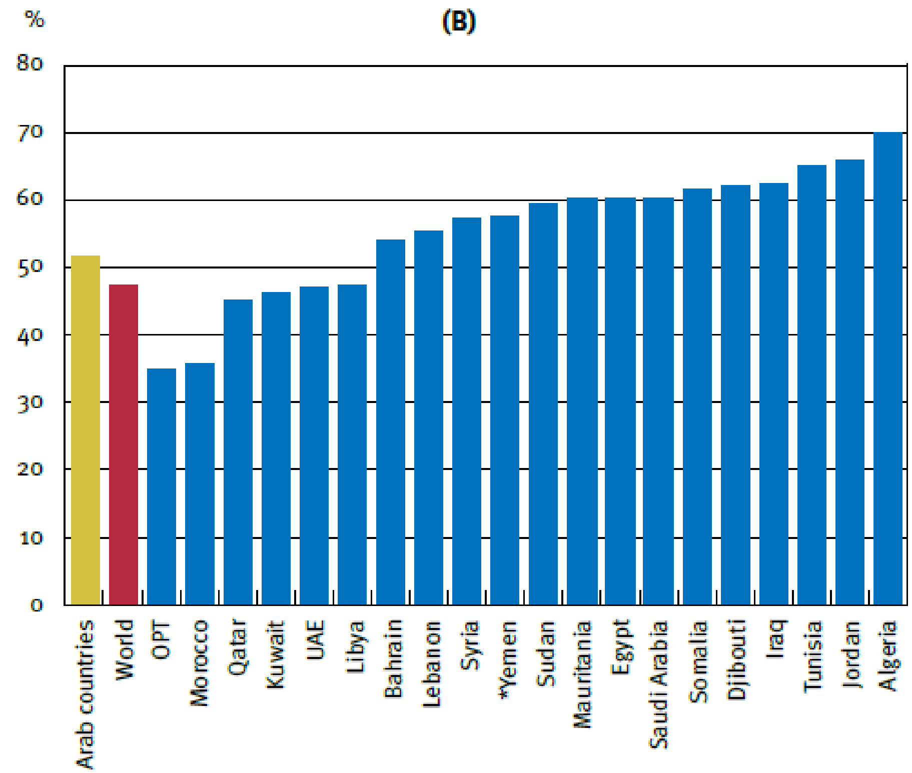
Unemployment Rate Among Arab Youth

Figure 28



Youth Unemployment as Percent of Total Unemployment

Figure 29



Source: Arab Development Report, 2009, p. 109.

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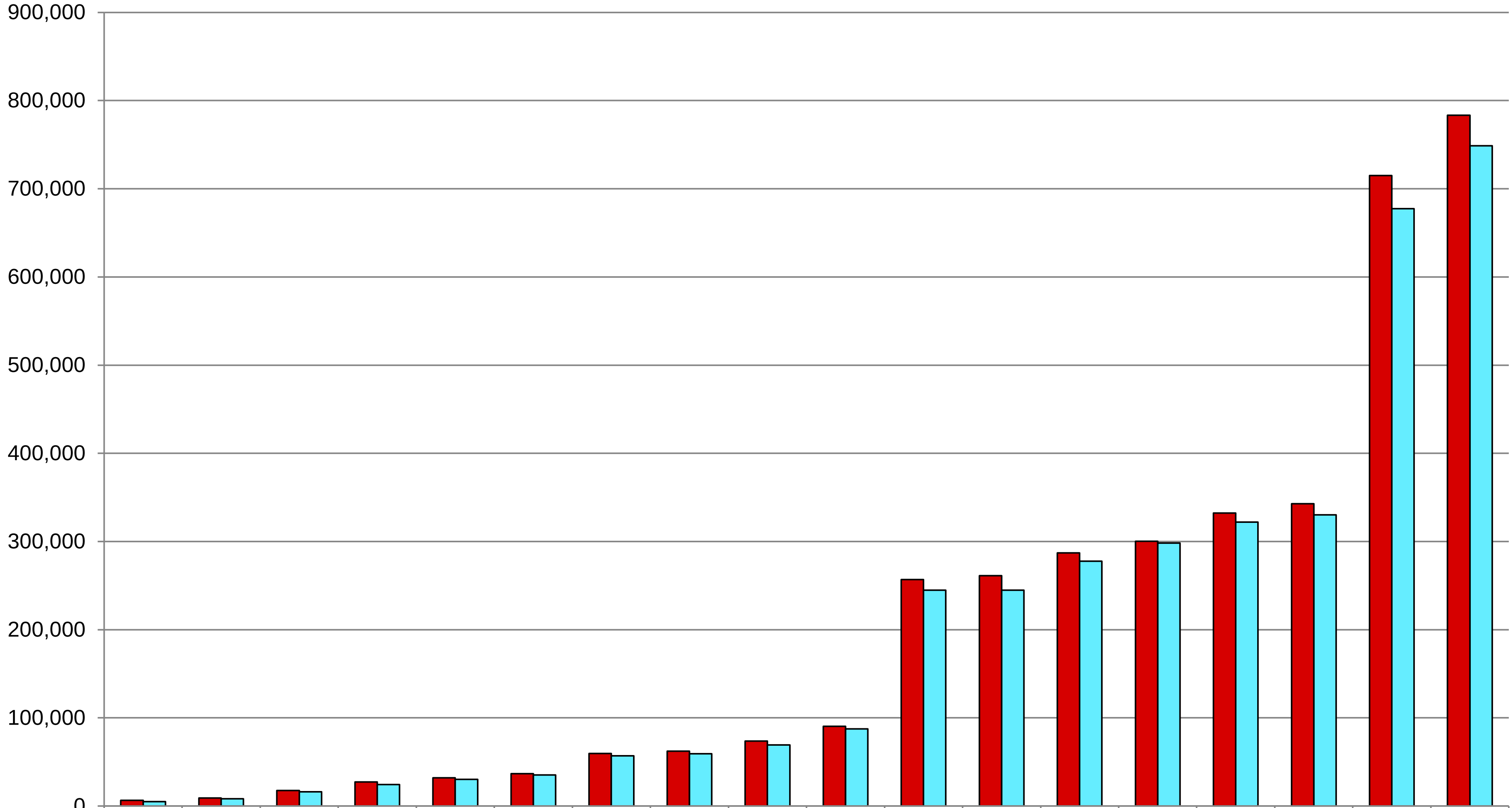
Figure 30

MENA Young Persons Entering Labor Force Each Year



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

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

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The Job Creation Challenge: New Jobs Required

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

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

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

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

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The Job Creation Challenge: Cost of New Jobs

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

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

"Human Economics," Not Macroeconomic Growth, Drive Instability

Low per capita incomes in most states. Very poor income distribution, and serious – if uncertain – poverty levels

Classic Economic Pressures

- Per Capita income is not rising to meet expectations; government blamed.
- Low comparative rates of development.
- Limited oil income – "wealth" – per capita.
- Major income disparities. Loss of status, exclusion from Middle Class.
- Price and inflationary shock at all levels of income. Recent spikes in food and energy prices.
- Mismanagement of state sector and government interference and favoritism.
- Uncertain subsidy affordability and impact.
- Significant numbers at or below a poverty line of $1-2 a day in family income.

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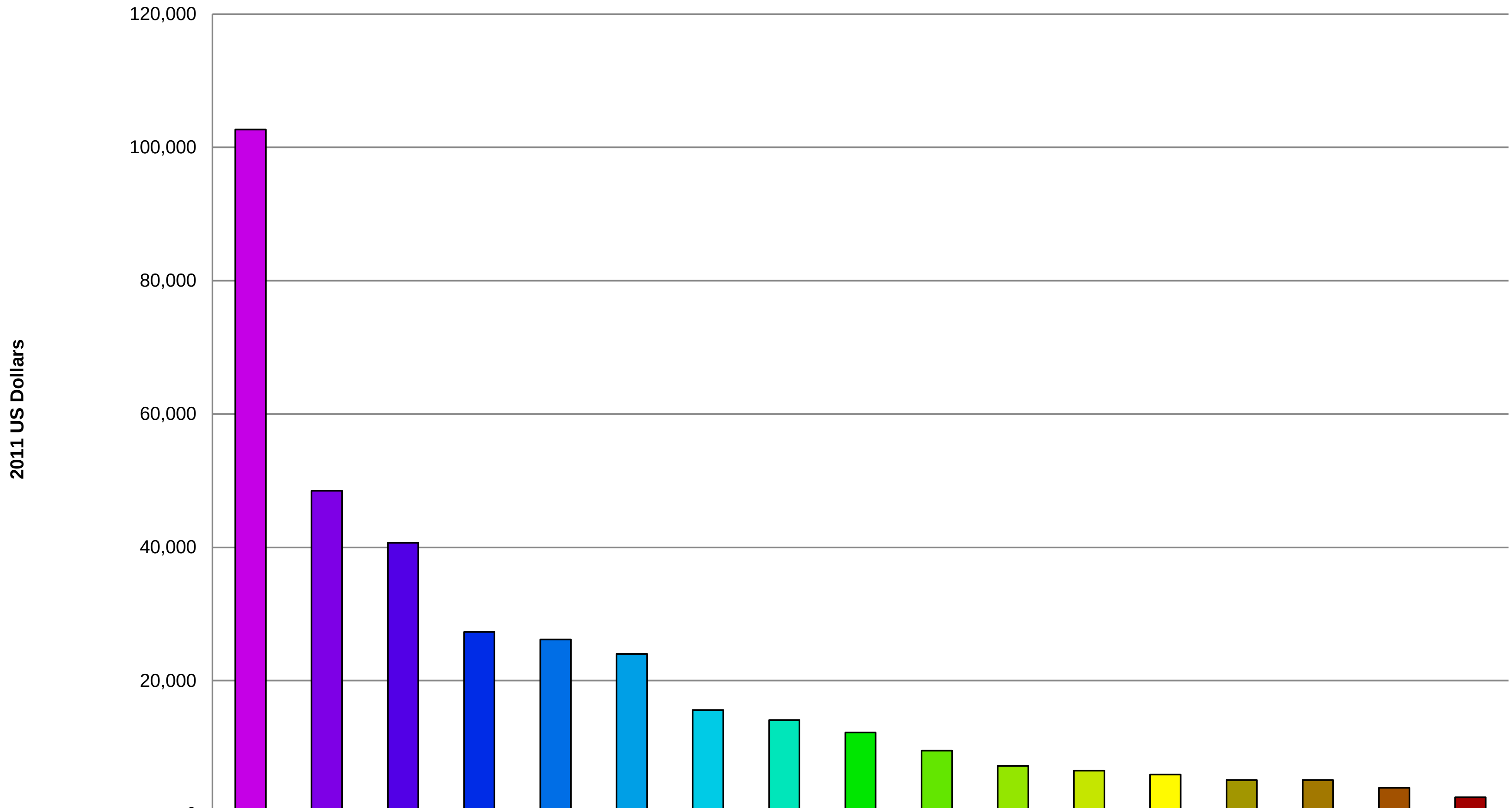
Per Capita GDP 2011, PPP

(in 2011 USD)

Figure 31



	Qatar	UAE	Kuwait	Bahrain	Oman	Saudi Arabia	Lebanon	Libya	Iran	Tunisia	Algeria	Egypt	Jordan	Morocco	Syria	Iraq	Yemen
Per Capita GDP PPP 2011	102,700	48,500	40,700	27,300	26,200	24,000	15,600	14,100	12,200	9,500	7,200	6,500	5,900	5,100	5,100	3,900	2,500

CIA Factbook, Accessed 2/1/2012.
https://www.cia.gov/library/publications/the-world-factbook/geos/ym.html

Note: Libyan data is for 2010 as the overthrow of Col. Gaddafi prevented accurate GDP estimation for 2011.

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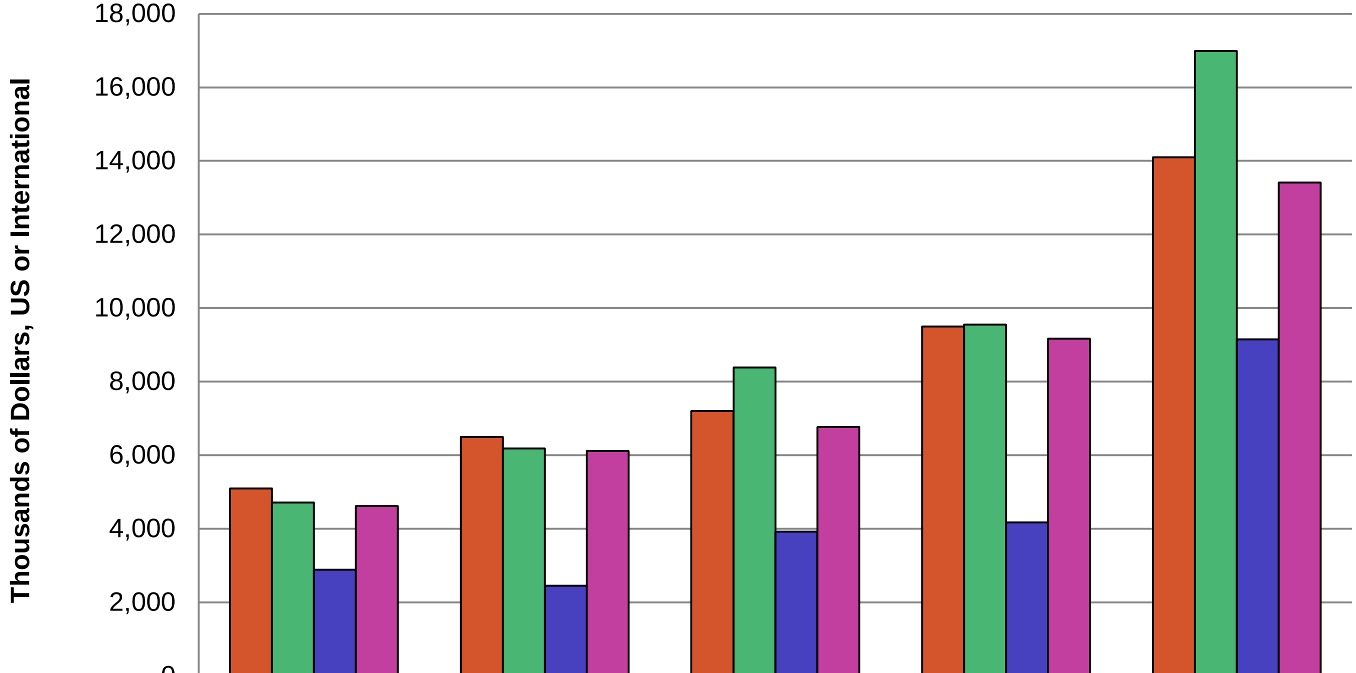
North Africa GDP Per Capita Estimates by Country

Figure 32

Notes:
- The CIA estimate for Libya's GDP is for 2010 as the 2011 unrest prevented accurate GDP estimation.
- * indicates that the World Bank data for that country is from the year 2009.



	Morocco	Egypt	Algeria	Tunisia	Libya*
2011 CIA GDP Estimate, PPP 2011 USD	5,100	6,500	7,200	9,500	14,100
2010 World Bank GDP Estimate, PPP Current International Dollars	4,712	6,180	8,384	9,550	16,987
2009 IMF GDP Estimate, Current USD	2,885	2,456	3,926	4,171	9,149
2009 IMF GDP Estimate, PPP Current International Dollar	4,619	6,112	6,769	9,165	13,413

Sources: World Bank Indicators: GDP Per Capita, http://data.worldbank.org/indicator/NY.GDP.PCAP.CD
CIA World Factbook, https://www.cia.gov/library/publications/the-world-factbook/
International Monetary Fund, World Economic Outlook Database, September 2011, http://www.imf.org
Accessed February 1, 2012.

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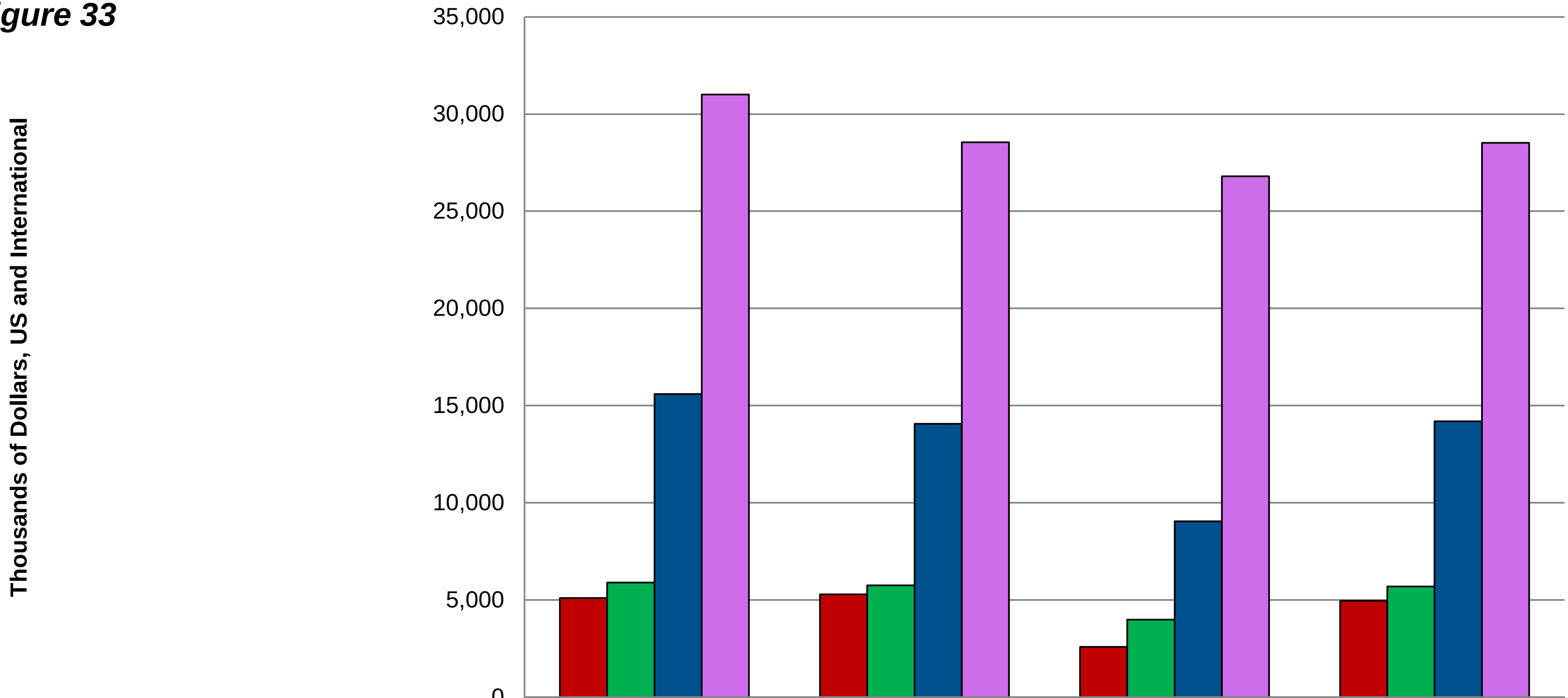
Levant GDP Per Capita Estimates by Country

Figure 33



	Syria	Jordan	Lebanon	Israel
2011 CIA GDP Estimate, PPP 2011 USD	5,100	5,285	2,593	4,963
2010 World Bank GDP Estimate, PPP Current International Dollars	5,900	5,749	3,987	5,697
2009 IMF GDP Estimate, Current USD	15,600	14,067	9,054	14,197
2009 IMF GDP Estimate, PPP Current International Dollar	31,000	28546	26,802	28,526

Sources: World Bank Indicators: GDP Per Capita, http://data.worldbank.org/indicator/NY.GDP.PCAP.CD
CIA World Factbook, https://www.cia.gov/library/publications/the-world-factbook/
International Monetary Fund, http://www.imf.org
Accessed February 1, 2012.

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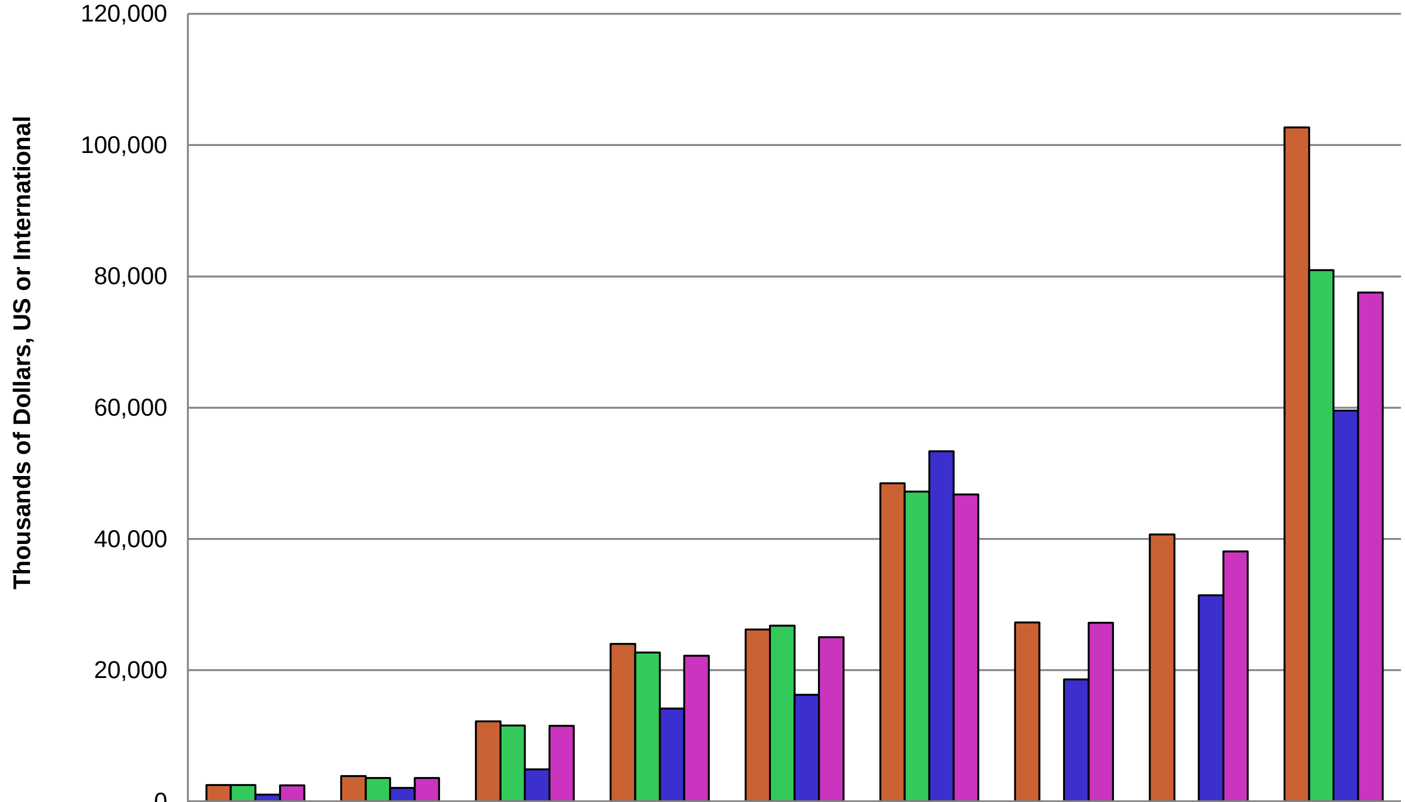
Gulf GDP Per Capita Estimates by Country

Figure 34

Note:

- *** indicates that the World Bank data for that country is from the year 2009.**

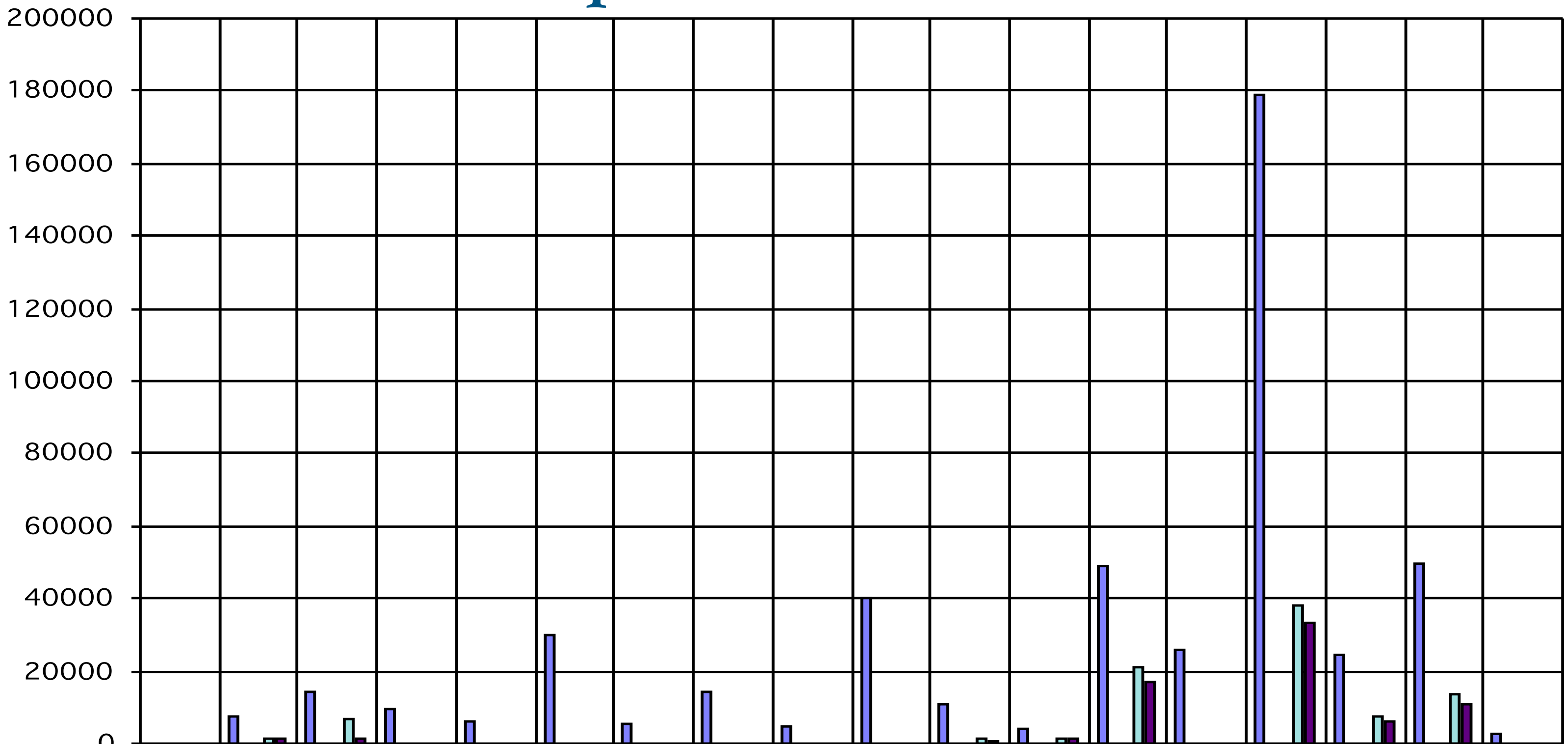


	Yemen*	Iraq	Iran*	Saudi Arabia	Oman*	UAE	Bahrain	Kuwait	Qatar*
2011 CIA GDP Estimate, PPP 2011 USD	2,500	3,900	12,200	24,000	26,200	48,500	27,300	40,700	102,700
2010 World Bank GDP Estimate, PPP Current International Dollars	2,507	3,562	11,570	22,713	26,791	47,215			80,944
2009 IMF GDP Estimate, Current USD	1,061	2,056	4,923	14,148	16,255	53,363	18,589	31,411	59,545
2009 IMF GDP Estimate, PPP Current International Dollar	2,457	3,569	11,550	22,186	25,033	46,794	27,242	38,103	77,568

Sources: World Bank Indicators: GDP Per Capita, http://data.worldbank.org/indicator/NY.GDP.PCAP.CD
CIA World Factbook, https://www.cia.gov/library/publications/the-world-factbook/
International Monetary Fund, http://www.imf.org
Accessed February 1, 2012.

MENA Per Capita Income and Petroleum Export Per Capita Income

Figure 35



	Morocco	Algeria	Libya	Tunisia	Egypt	Israel	Jordan	Lebanon	Syria	Bahrain	Iran	Iraq	Kuwait	Oman	Qatar	Saudi Arabia	UAE	Yemen
Per Capita Income		7,300	14,000	9,400	6,200	29,800	5,400	14,400	4,800	40,300	10,600	3,800	48,900	25,600	179,000	24,200	49,600	2,700
World Ranking		*127	*83	*113	*137	*46	*143	*81	*152	*20	*104	*159	*10	*54	*1	*55	*9	*172
Per Capita Oil Export Income																		
--2010		1,540	6,837	-	-	-	-	-	-	-	1,085	1,686	21,416	-	38,281	7,685	13,508	-
--Jan-Jul 2011		1,169	1,339	-	-	-	-	-	-	-	826	1,335	16,702	-	33,400	6,081	11,120	-

Source: CIA World Factbook, Accessed February 1, 2012 – Per Capita Income
https://www.cia.gov/library/publications/the-world-factbook/geos/ag.html
EIA, OPEC Revenue Factsheet, August 2011 – OPEC Revenue Data
http://www.eia.gov/cabs/OPEC_Revenues/pdf.pdf

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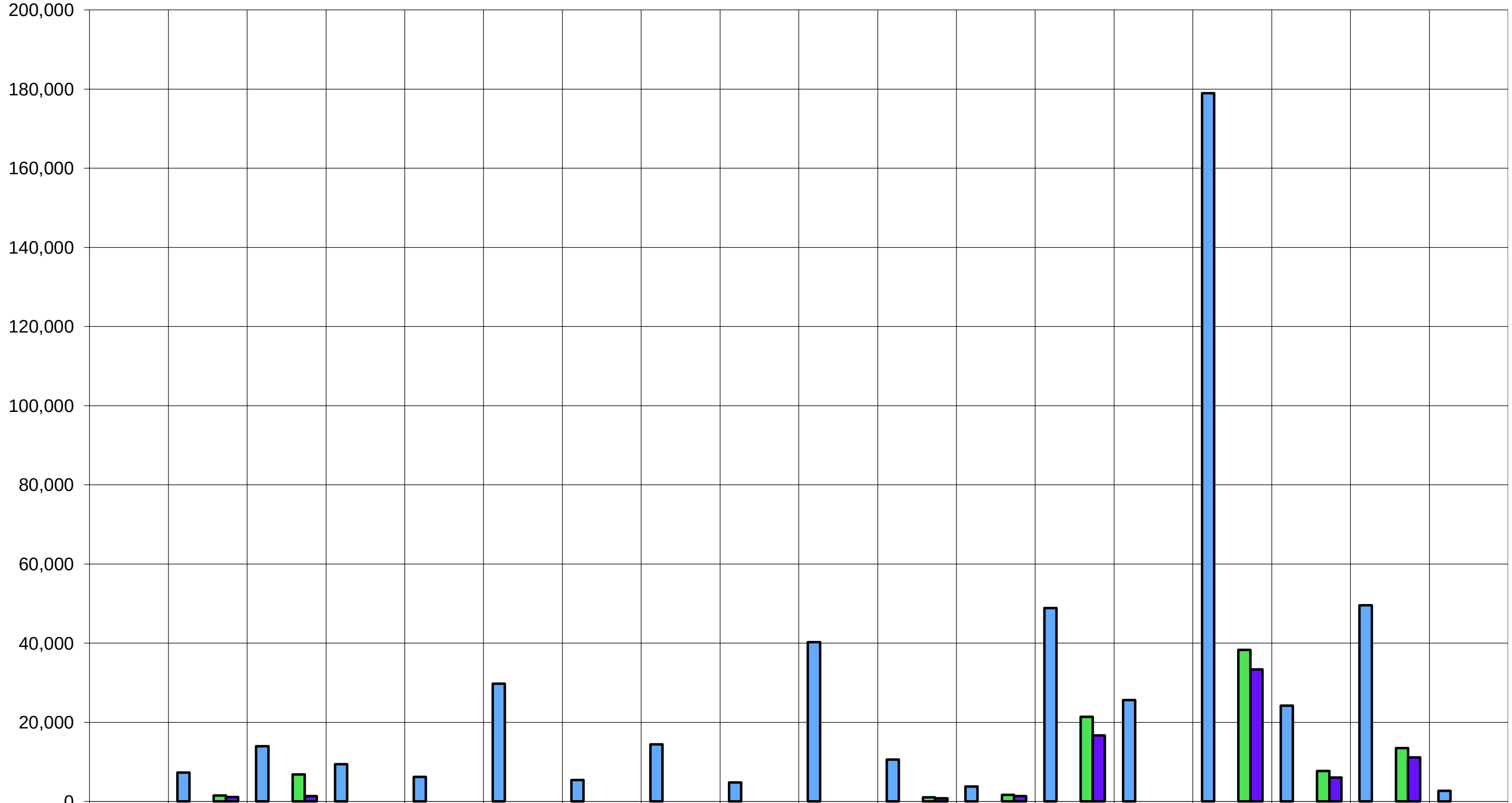
Iraqi Per Capita Income vs. Other OPEC Countries

Figure 36



	Morocco	Algeria	Libya	Tunisia	Egypt	Israel	Jordan	Lebanon	Syria	Bahrain	Iran	Iraq	Kuwait	Oman	Qatar	Saudi Arabia	UAE	Yemen
Per Capita Income		7,300	14,000	9,400	6,200	29,800	5,400	14,400	4,800	40,300	10,600	3,800	48,900	25,600	179,000	24,200	49,600	2,700
World Ranking		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Per Capita Oil Export Income																		
--2010		1,540	6,837	0	0	0	0	0	0	0	1,085	1,686	21,416	0	38,281	7,685	13,508	0
--Jan-Jul 2011		1,169	1,339	0	0	0	0	0	0	0	826	1,335	16,702	0	33,400	6,081	11,120	0

Source: CIA World Factbook, Accessed February 1, 2012 – Per Capita Income
https://www.cia.gov/library/publications/the-world-factbook/geos/ag.html
EIA, OPEC Revenue Factsheet, August 2011 – OPEC Revenue Data
http://www.eia.gov/cabs/OPEC_Revenues/pdf.pdf

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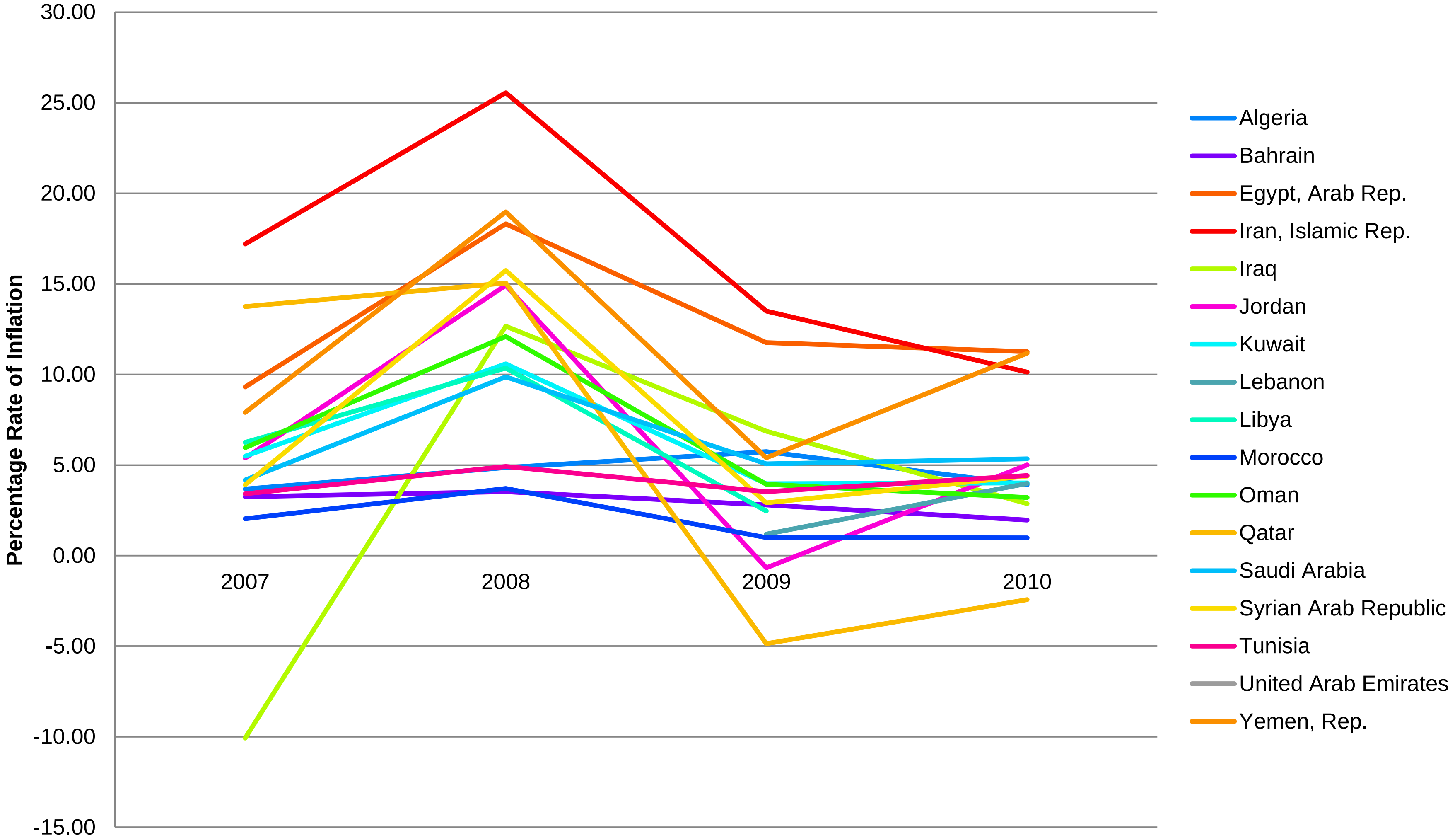
Volatility of Inflation in the MENA Region

Figure 37

National Inflation Rates, Consumer Prices 2007 - 2010

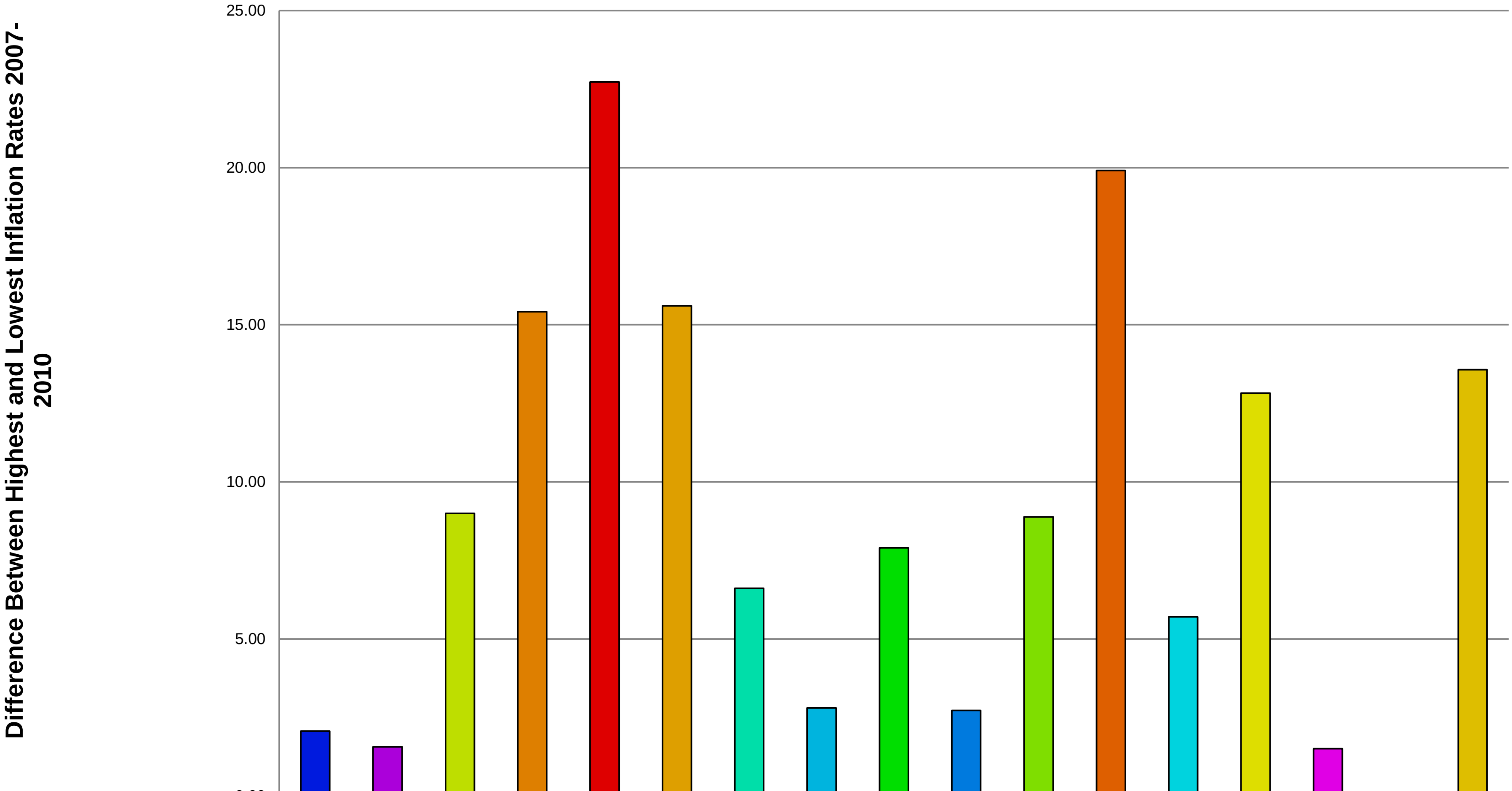


The World Bank, dataBank, Accessed 2/9/2012.
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

Volatility of Inflation in the MENA Region

Figure 38

Range of Given National Inflation Rates, Consumer Prices 2007-2010



	Algeria	Bahrain	Egypt, Arab Rep.	Iran, Islamic Rep.	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudi Arabia	Syrian Arab Republic	Tunisia	United Arab Emirates	Yemen, Rep.
Range of Inflation Rates 2007-2010	2.06	1.56	9.00	15.41	22.73	15.61	6.61	2.80	7.90	2.72	8.89	19.91	5.70	12.82	1.50		13.57

The World Bank, dataBank, Accessed 2/9/2012.
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

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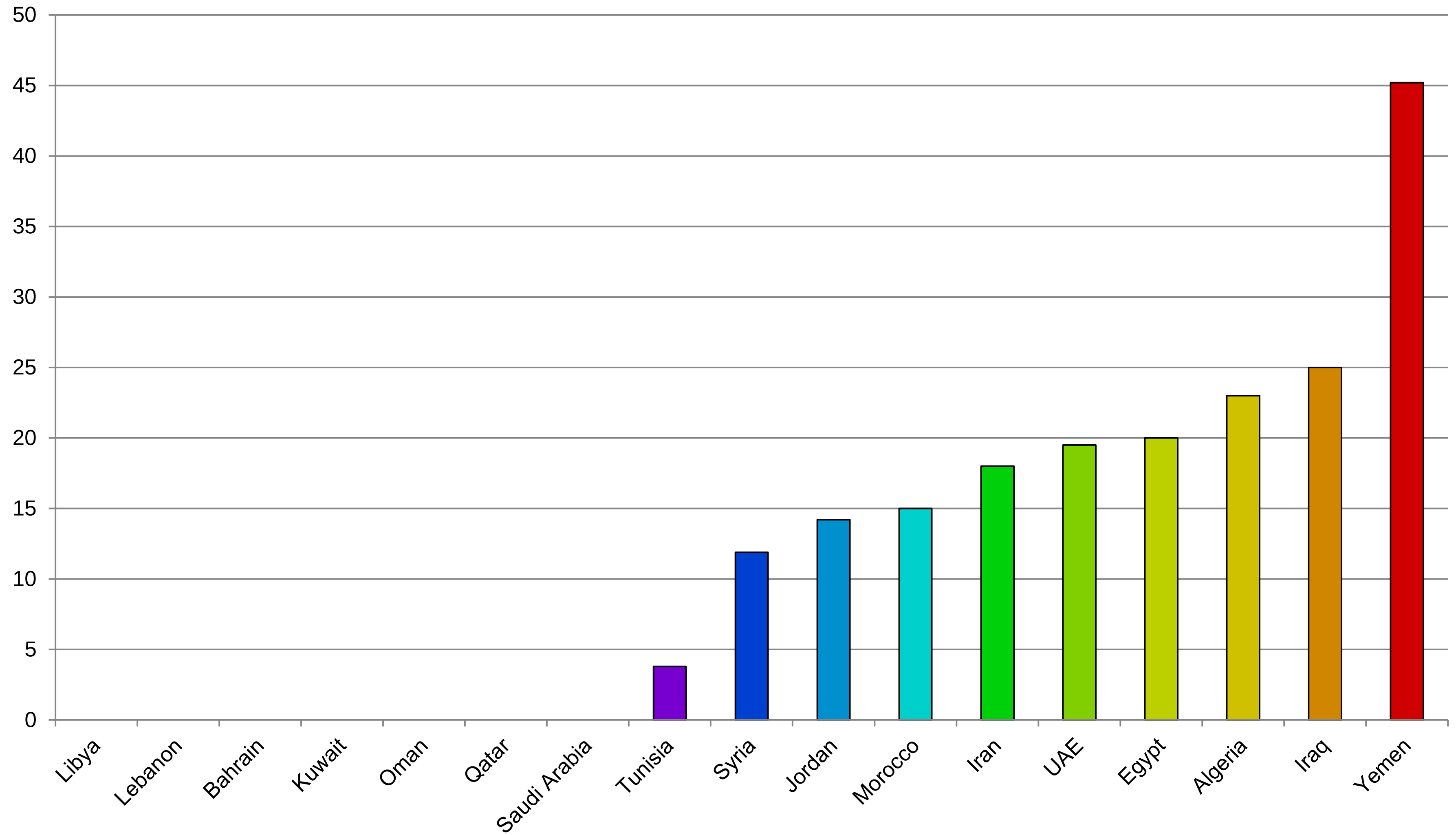
Population Below Poverty Line
(In Percent)

Figure 39



Source: CIA, World Factbook, Accessed January 2011.
Note: Not all poverty figures are available.

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Poverty Trends by Region and MENA Country

Figure 40

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

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

Source: Chen and Ravallion 2007.

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

Figure 41

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

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

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

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

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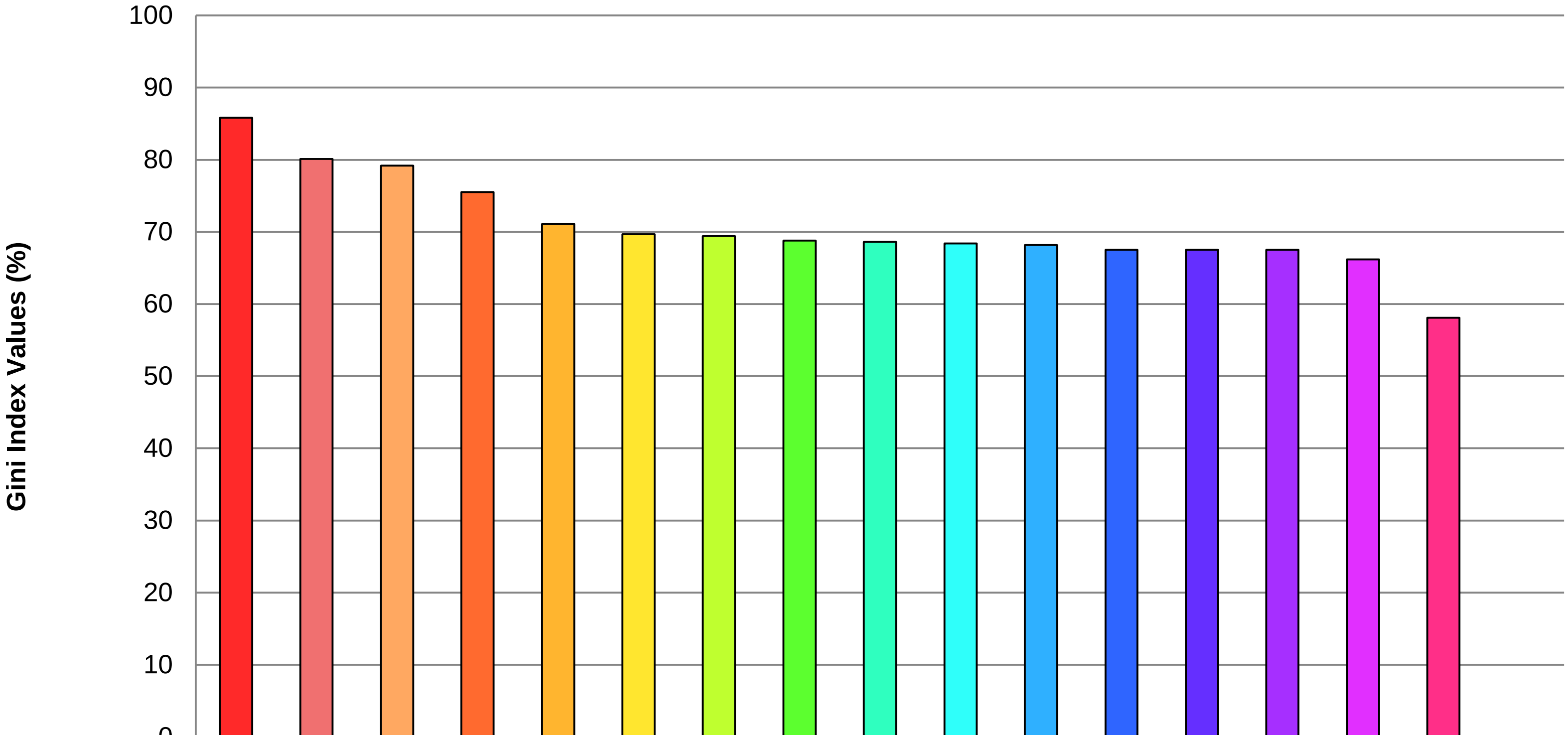
Gini Index

Figure 42

Gini Index (%)



	Lebanon	Egypt	Saudi Arabia	Libya	Qatar	UAE	Kuwait	Morocco	Tunisia	Oman	Syria	Yemen	Jordan	Iran	Algeria	Bahrain	Iraq
Gini Index (%)	85.8	80.1	79.2	75.5	71.1	69.7	69.4	68.8	68.6	68.4	68.2	67.5	67.5	67.5	66.2	58.1	

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

Credit Suisse, Credit Suisse Research Institute, *Global Wealth Databook 2011*. p. 87-89. Accessed January 2011. https://infocus.credit-suisse.com/data/_product_documents/_shop/324292/2011_global_wealth_report_databook.pdf

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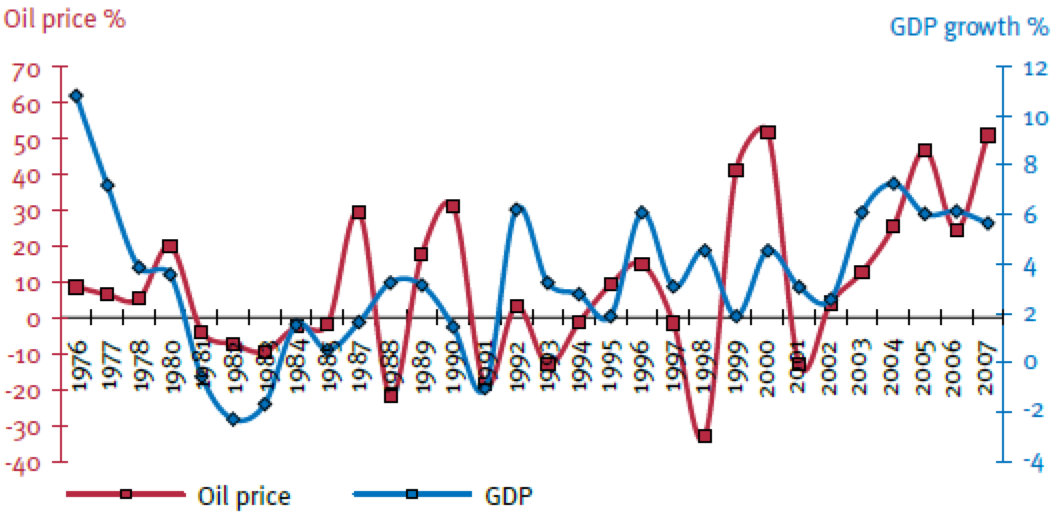
Income Distribution in MENA After Years of Unstable Growth

Figure 43

Riding a rollercoaster: regional GDP growth based on constant 1990 prices, and growth in nominal oil prices, 1976-2007

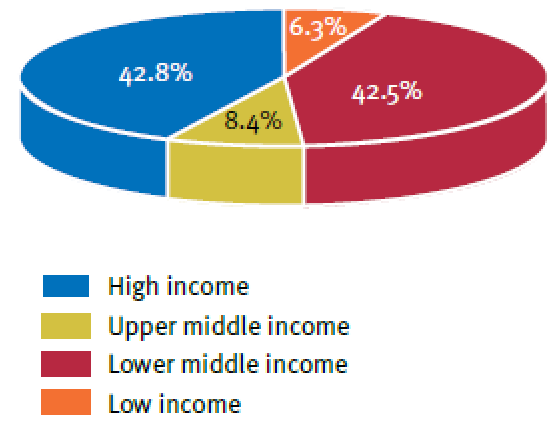


Source: UNDP/AHDR calculations based on UNSD 2008.

Notes: Data for 1979 and 1986 were removed from the graph as they were significant outliers.

Figure 44

Distribution of regional GDP: by country group, 2007



Source: UNDP/AHDR calculations based on IMF 2007; World Bank 2008.

Source: Arab Development Report, 2009, p. 101.

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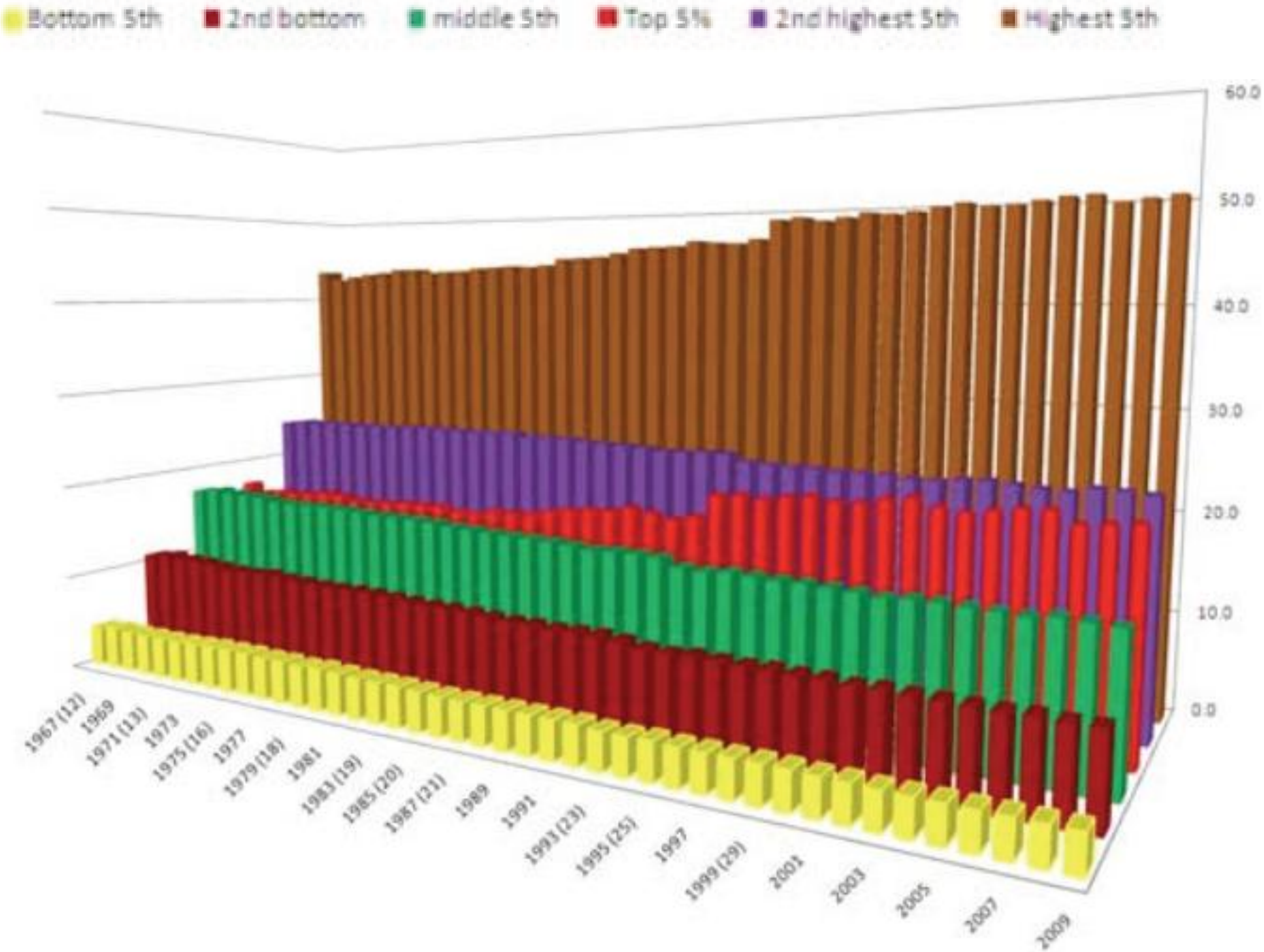
American Aggregate Income by 5ths, plus top 5%

Figure 45



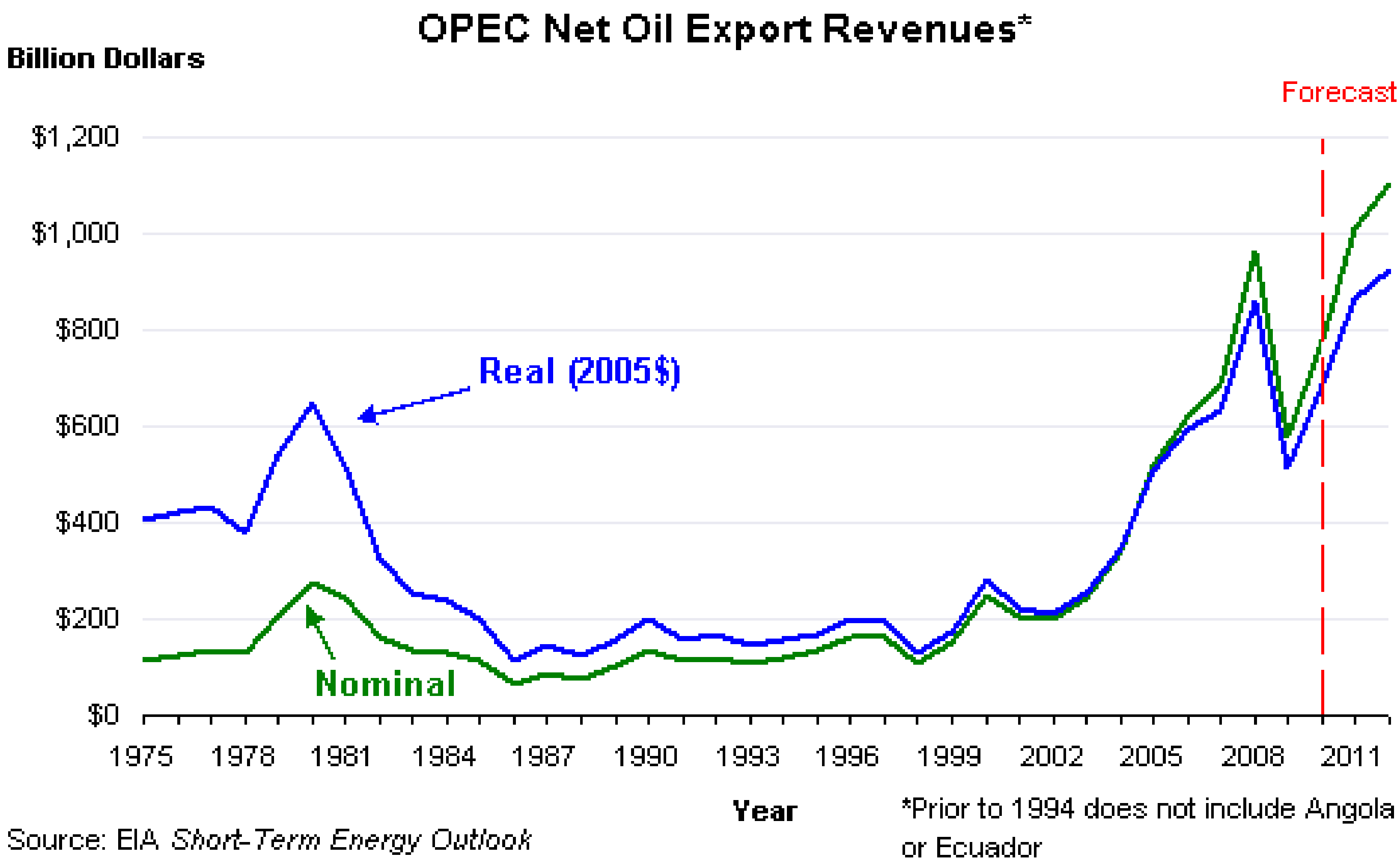
http://www.economicpopulist.org

The Illusion of Regional Oil Wealth

Many petroleum exporting countries end up a rentier states with distort economies, limited job creation, and limited per capita income

The Real World Limits to Oil Wealth

Figure 46



Source: ***US Department of Energy, Energy Information Agency, August 2011,*** *http://www.eia.gov/countries/regions-topics.cfm?fips=OPEC*

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Figure 47

OPEC Net Oil Export Revenues

Country	Nominal (Billion $)				Real (Billion 2005$)			
	2010	2011	2012	Jan-Jul 2011	2010	2011	2012	Jan-Jul 2011
Algeria	$53	- -	- -	$41	$47	- -	- -	$35
Angola	$56	- -	- -	$38	$49	- -	- -	$33
Ecuador	$8	- -	- -	$6	$7	- -	- -	$5
Iran	$73	- -	- -	$56	$64	- -	- -	$48
Iraq	$50	- -	- -	$40	$44	- -	- -	$35
Kuwait	$60	- -	- -	$48	$53	- -	- -	$41
Libya	$44	- -	- -	$9	$39	- -	- -	$8
Nigeria	$65	- -	- -	$52	$57	- -	- -	$45
Qatar	$37	- -	- -	$33	$33	- -	- -	$28
Saudi Arabia	$225	- -	- -	$180	$198	- -	- -	$155
UAE	$67	- -	- -	$57	$59	- -	- -	$49
Venezuela	$41	- -	- -	$34	$36	- -	- -	$29
OPEC	$778	$1,011	$1,105	$594	$685	$863	$926	$510

Source: *UAS Department of Energy, Energy Information Agency, December 2010, http://www.eia.doe.gov/cabs/OPEC_Revenues/Factsheet.html*

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OPEC Per Capita Net Oil Export Revenues

Figure 48

Country	Nominal ($)				Real (2005$)			
	2010	2011	2012	Jan-Jul 2011	2010	2011	2012	Jan-Jul 2011
Algeria	$1,540	- -	- -	$1,169	$1,356	- -	- -	$1,003
Angola	$4,249	- -	- -	$2,879	$3,741	- -	- -	$2,470
Ecuador	$542	- -	- -	$413	$477	- -	- -	$354
Iran	$1,085	- -	- -	$826	$955	- -	- -	$709
Iraq	$1,686	- -	- -	$1,335	$1,484	- -	- -	$1,145
Kuwait	$21,416	- -	- -	$16,702	$18,848	- -	- -	$14,327
Libya	$6,837	- -	- -	$1,339	$6,017	- -	- -	$1,158
Nigeria	$450	- -	- -	$354	$396	- -	- -	$303
Qatar	$38,281	- -	- -	$33,400	$33,685	- -	- -	$28,651
Saudi Arabia	$7,685	- -	- -	$6,081	$6,763	- -	- -	$5,216
UAE	$13,508	- -	- -	$11,120	$11,888	- -	- -	$9,538
Venezuela	$1,498	- -	- -	$1,244	$1,318	- -	- -	$1,067
OPEC	$2,074	$2,644	$2,837	$1,560	$1,825	$2,257	$2,378	$1,339

Source: *US Department of Energy, Energy Information Agency, August 2011, http://www.eia.gov/countries/regions-topics.cfm?fips=OPEC*

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

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

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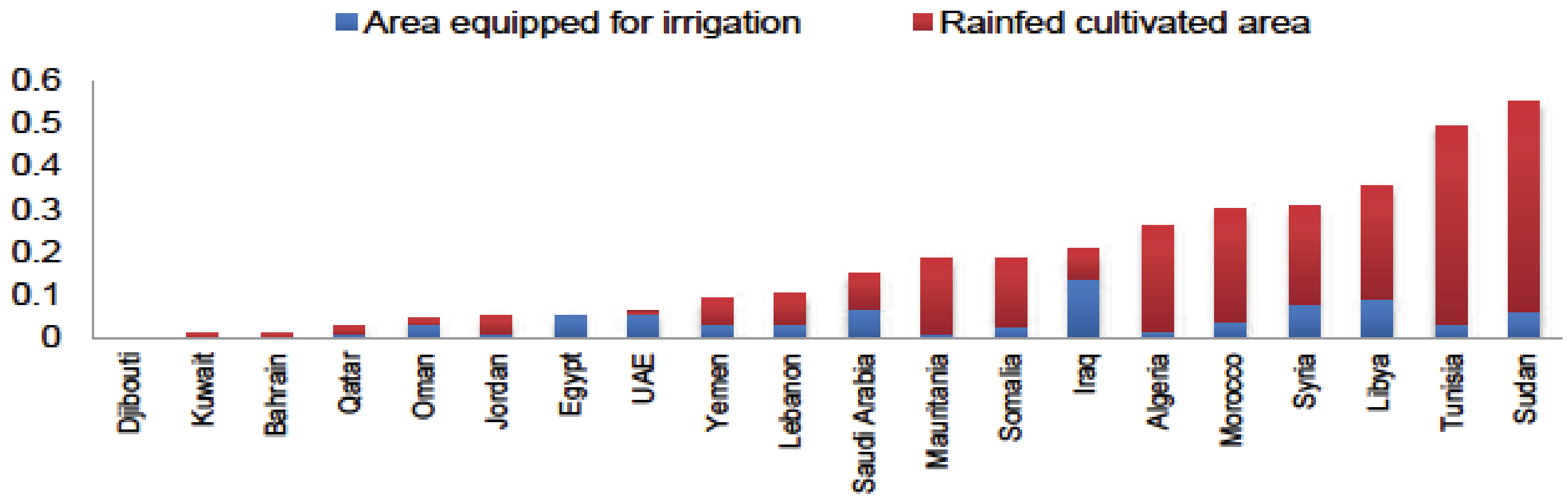
The "Food Gap" in Arab States: Cultivated Areas Per Capita

Figure 34: Cultivated areas per capita in Arab countries (hectares), 2003-2007



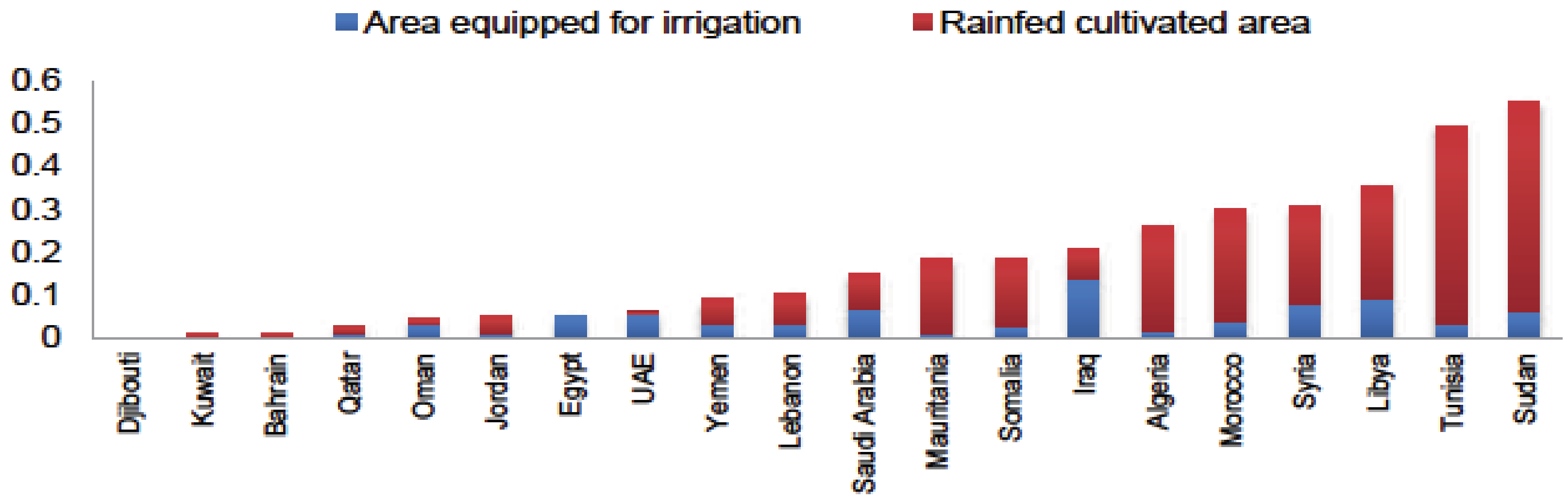
Falling mostly within the arid and semi-arid rainfall zones and with limited agricultural potential resources, most Arab countries have attempted to increase their agricultural production with improvement in productivity, intensive farming, extensive use of water resources for irrigation and expansion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

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

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

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

Figure 34: Cultivated areas per capita in Arab countries (hectares), 2003-2007



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

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

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

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

Lack of Food Self-Sufficiency in the Arab Region

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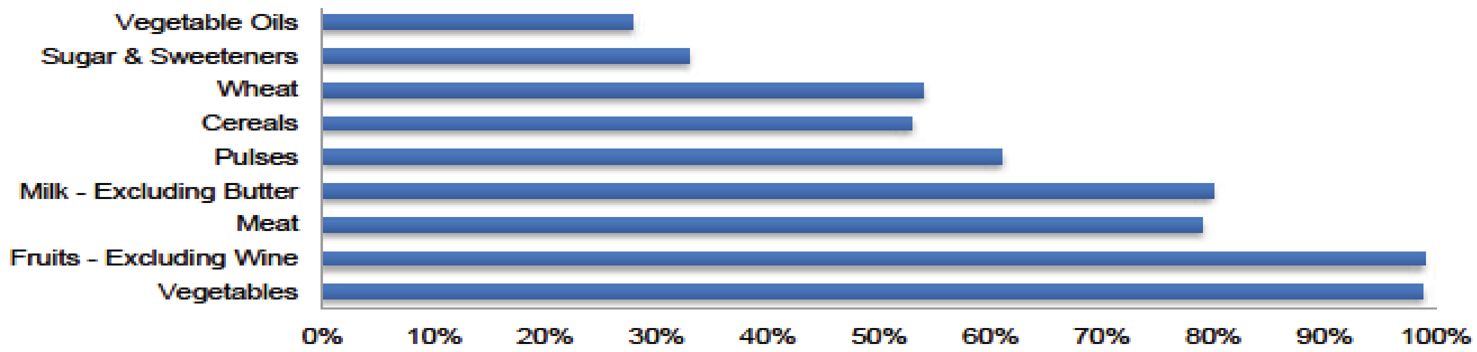
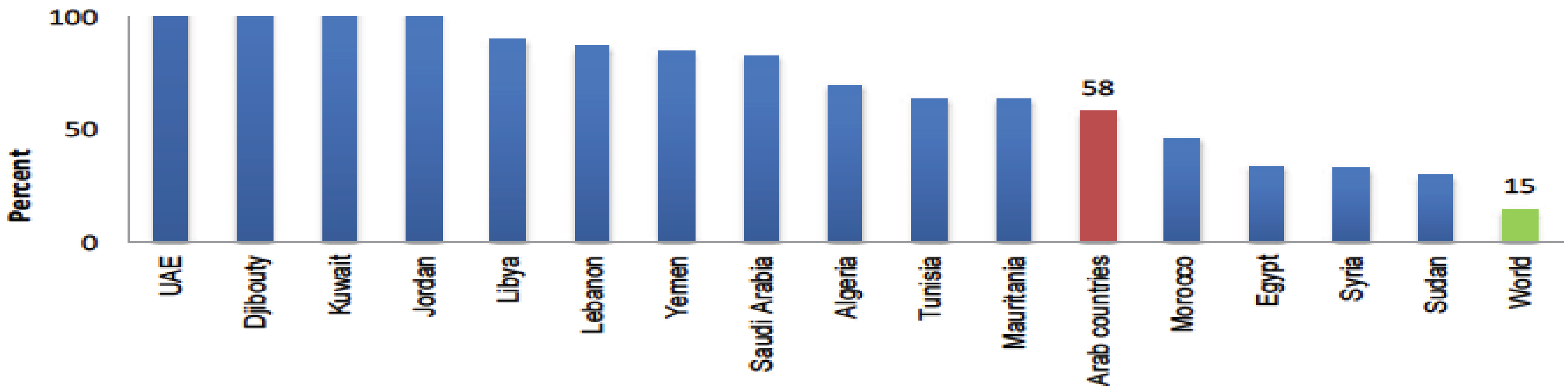
Figure 36: Ratio of production to total domestic supply in the Arab region, 2004-2007



Source: ibid
Note: Arab countries included are Algeria, Egypt, Djibouti, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Saudi Arabia, Sudan, Syria, Tunisia, UAE and Yemen.

Figure 37: Ratio of cereal imports to domestic supply in Arab countries, 2004-2007



Import dependence for food is highly variable amongst Arab countries, as shown by figure 37. Ratio of cereal imports to domestic supply varies from 23% in Sudan and Syria, to 100% and more (due to re-exports) in Jordan, Kuwait, Djibouti and UAE. In addition, dependency on cereal imports hovers around or exceeds 80% in eleven countries. Calculated in terms of caloric value, the ratio of total food imports to total food caloric supply presents a similar pattern for almost all the countries. In other words, only three countries in the region (Sudan, Syria and Egypt) depend on food imports for less than half of their daily caloric supply.

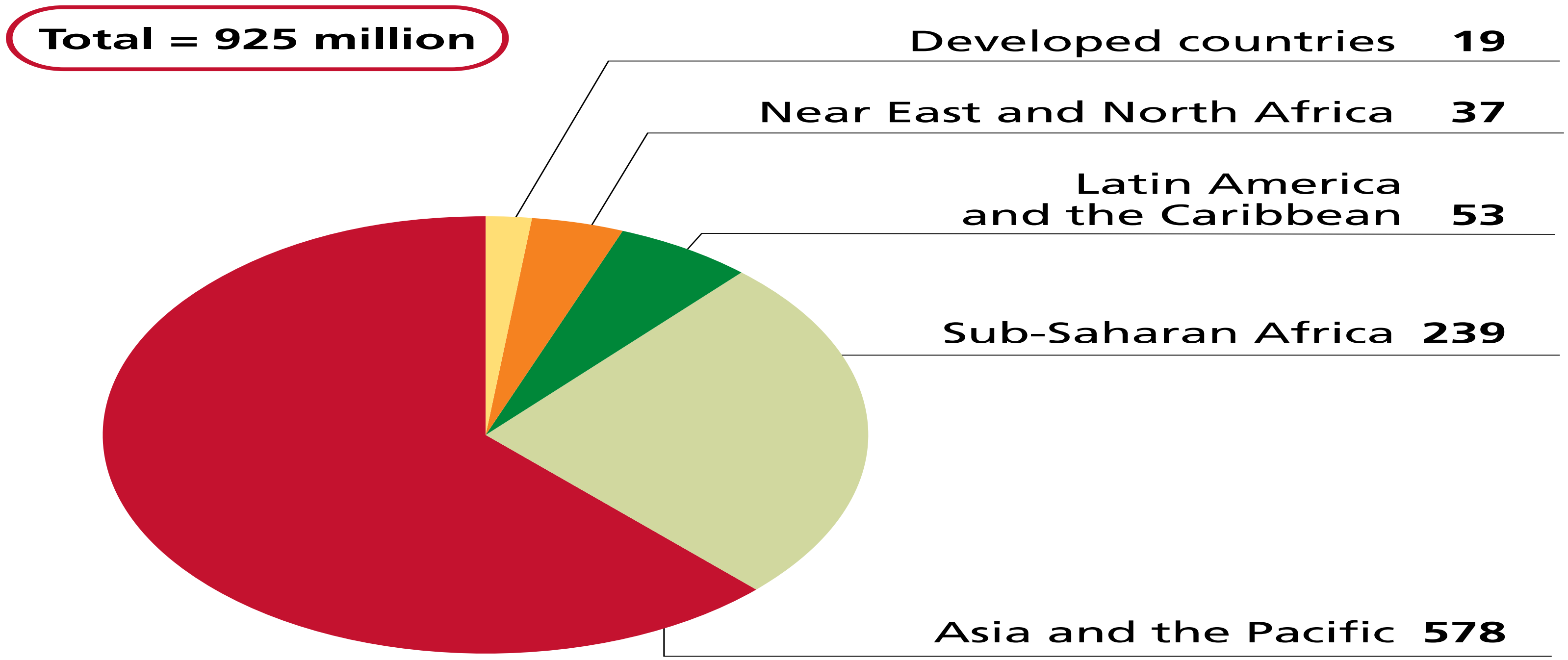
the Self Sufficiency Ratio (SSR), or the ratio of local production to total domestic supply for the region is 53% for cereals, 28% for vegetable oils and 33% for sugar. It is important to note that these three categories of products provide the bulk of the daily caloric food supply for the vast majority of Arab populations, particularly the poor. However, the region is close to self sufficiency in meat and fruit products that are mainly consumed by the rich.

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, p. 55-56.

Relatively High Food Levels, but 37 Million Undernourished

Figure 50

Undernourishment in 2010, by region (millions)



Note: All figures are rounded. *Source:* FAO.

UN WFP/FAO, *The State of Food Insecurity in the World*, 2010, p. 10.

Undernourished by MENA Country

Figure 51

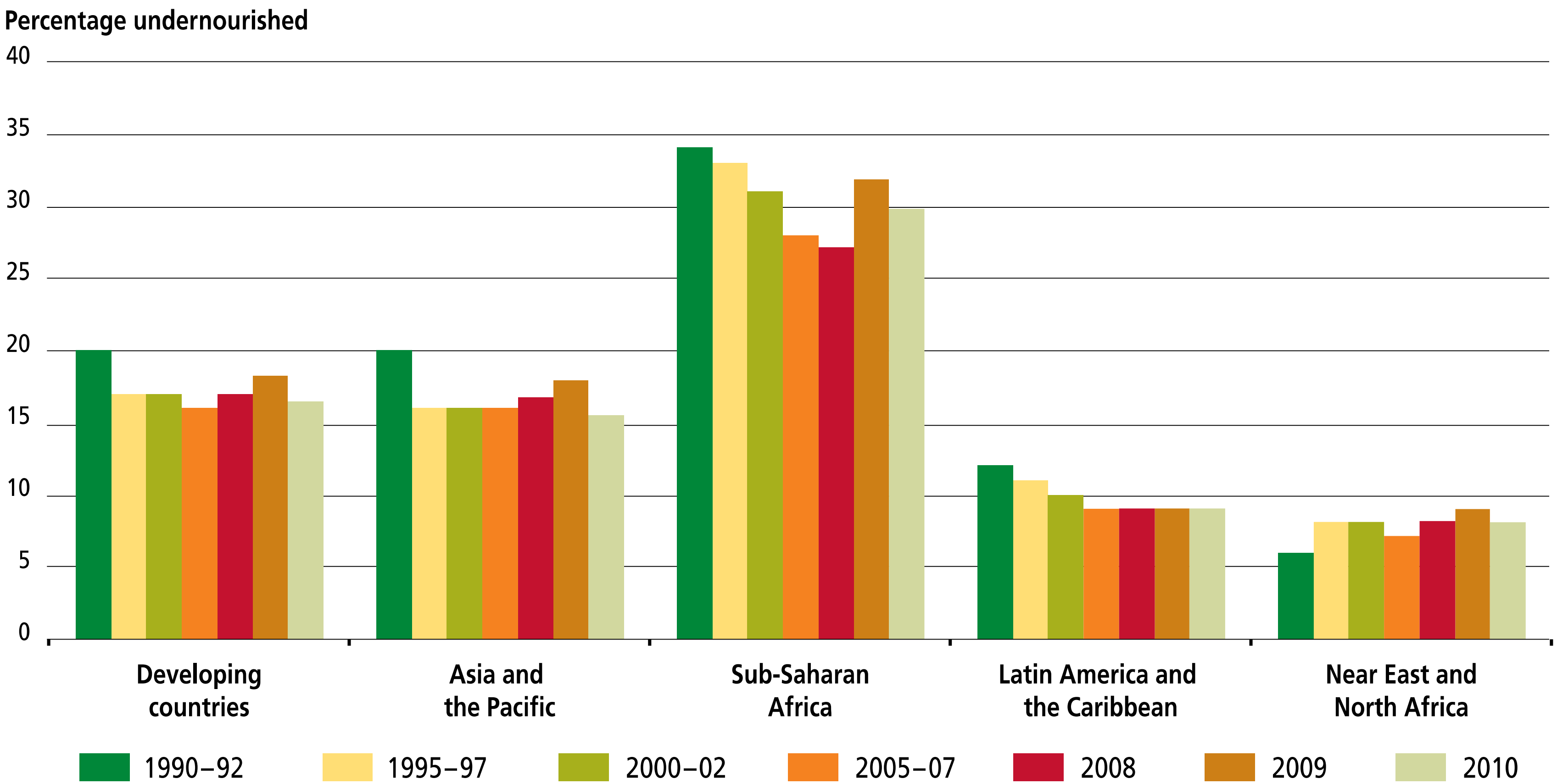
NEAR EAST AND NORTH AFRICA* **	**439.3**	**19.6**	**29.5**	**31.8**	**32.4**	**1.6**	▲	**6**	**8**	**8**	**7**	**1.2**	▲
Near East	**280.4**	**14.6**	**24.1**	**26.2**	**26.3**	**1.8**	▲	**7**	**11**	**10**	**9**	**1.3**	▲
Iran (Islamic Republic of) [1]	71.6	ns	ns	ns	ns	na	na	–	–	–	–	na	na
Jordan [1]	5.8	ns	0.2	0.2	ns	na	na	–	5	5	–	na	na
Kuwait [2]	2.8	0.4	0.1	0.1	0.1	0.3	▼	20	5	6	5	0.2	▼
Lebanon [1]	4.1	ns	ns	ns	ns	na	na	–	–	–	–	na	na
Saudi Arabia [1]	24.1	ns	ns	ns	ns	na	na	–	–	–	–	na	na
Syrian Arab Republic [1]	19.8	ns	ns	ns	ns	na	na	–	–	–	–	na	na
Turkey [1]	72.1	ns	ns	ns	ns	na	na	–	–	–	–	na	na
United Arab Emirates [1]	4.2	ns	ns	ns	ns	na	na	–	–	–	–	na	na
Yemen [4]	21.6	3.8	5.0	5.7	6.7	1.7	▲	30	31	31	31	1.0	▲
North Africa	**158.8**	**5.0**	**5.4**	**5.6**	**6.1**	**1.2**	▲	**–**	**–**	**–**	**–**	**na**	**na**
Algeria [1]	33.4	ns	1.5	1.4	ns	na	na	–	5	5	–	na	na
Egypt [1]	78.6	ns	ns	ns	ns	na	na	–	–	–	–	na	na
Libyan Arab Jamahiriya [1]	6.0	ns	ns	ns	ns	na	na	–	–	–	–	na	na
Morocco [1]	30.9	1.5	1.6	1.6	ns	na	na	6	6	6	–	na	na
Tunisia [1]	10.0	ns	ns	ns	ns	na	na	–	–	–	–	na	na

UN WFP/FAO, *The State of Food Insecurity in the World*, 2010, p. 51.

Proportion of Undernourished: 1990-2010

Figure 49

Regional trends in the proportion of undernourished, from 1990-92 to 2010



Source: FAO.

UN WFP/FAO, *The State of Food Insecurity in the World*, 2010, p. 11.

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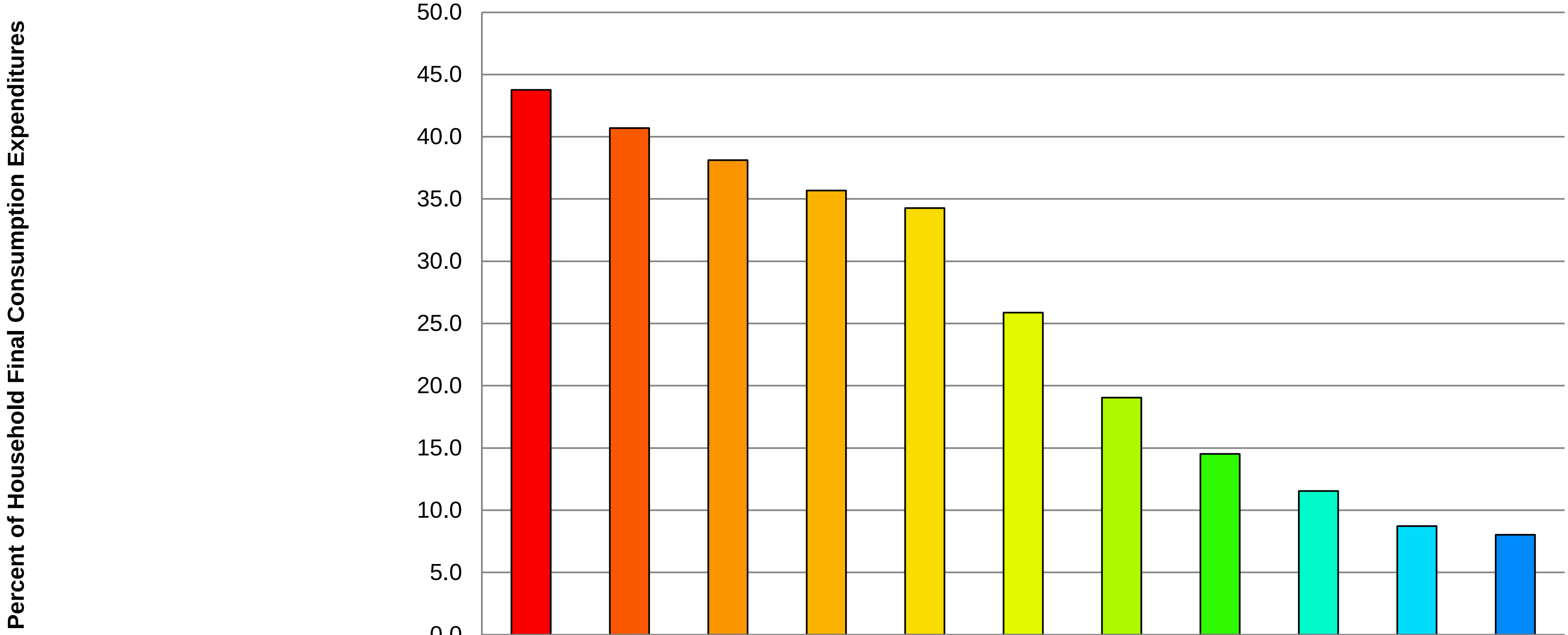
Figure 52

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



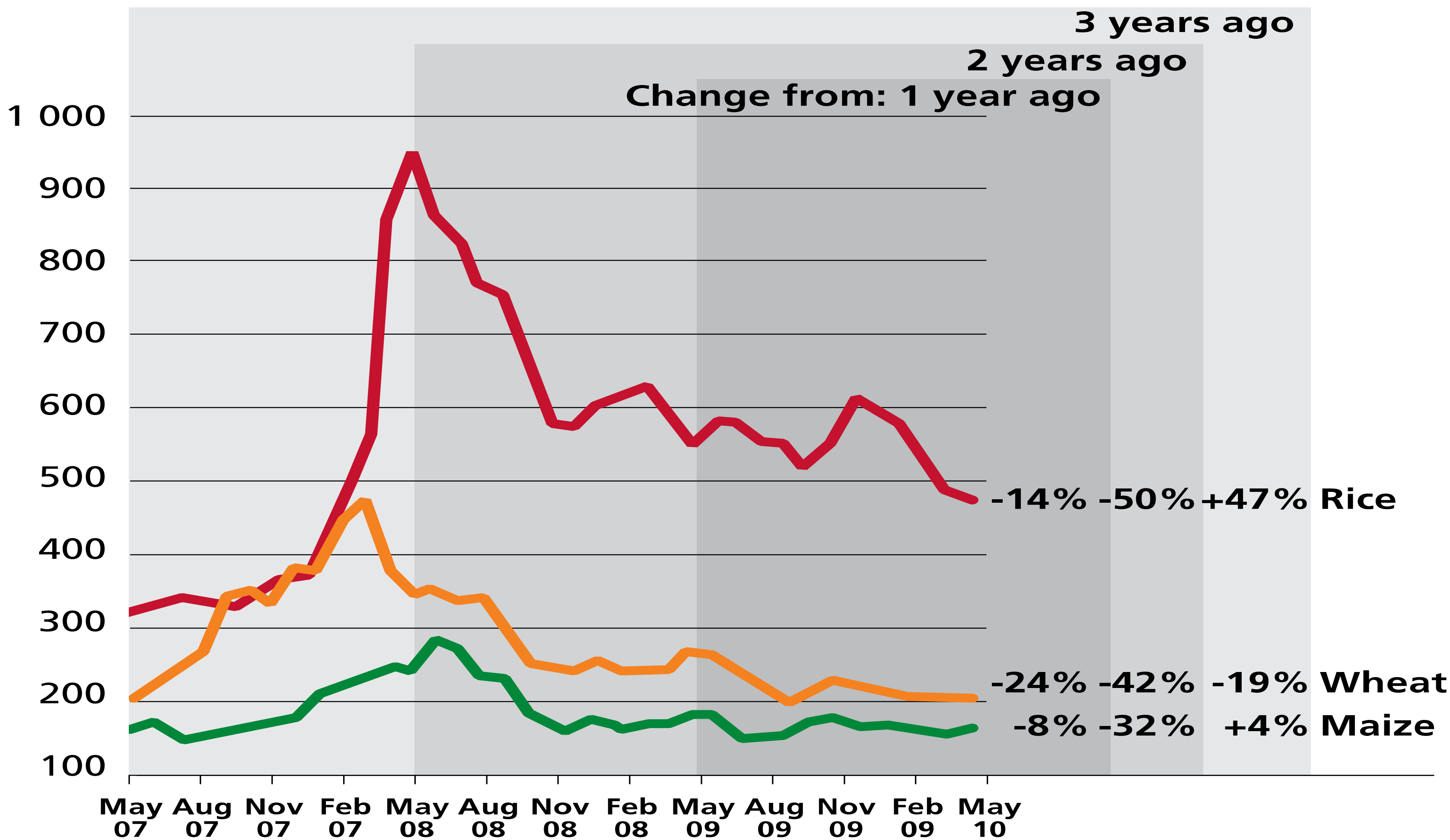
	Algeria	Jordan	Egypt	Tunisia	Qatar	Iran	Kuwait	Bahrain	Morocco	United Arab Emirates	Saudi Arabia
Percent of Household Final Consumption Expenditures Spent on Food Consumed at Home: 2009	43.8	40.7	38.1	35.7	34.3	25.9	19.0	14.5	11.5	8.7	8.0

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

Peaks in Food Prices - I

Figure 53

International cereal prices (benchmark monthly averages; US$/tonne)



Source: FAO. 2010. *Crop prospects and food situation*. No. 2 (May). Rome.

UN WFP/FAO, *The State of Food Insecurity in the World*, 2010, p. 10.

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Peaks in Food Prices - II

Figure 54

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

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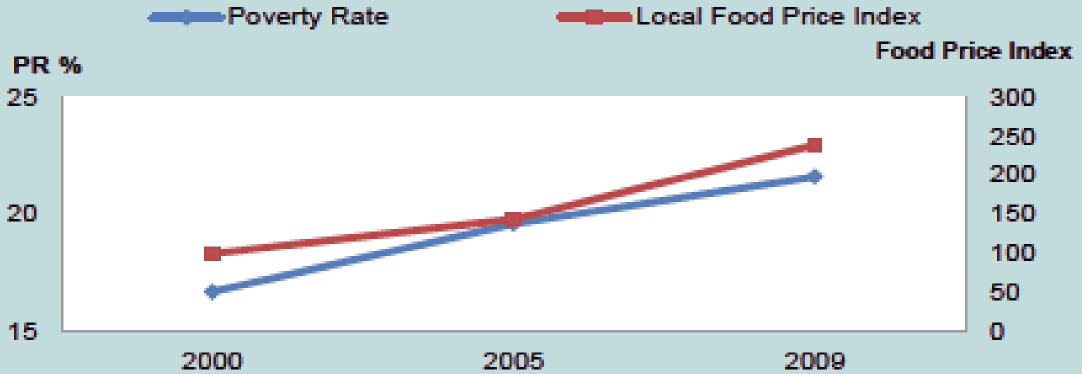
Soaring Food Prices and Poverty: Egypt as a Case Study

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

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

Poverty Rate and Local Food Price Index from 2000-2009



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

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

Low Regional Crises Scores: 1990-2010

Figure 55

Country	Natural disaster only	Human-induced disaster only	Combined natural and human-induced disaster	Total disasters (1996–2010)	Humanitarian aid/total ODA (2000–2008)
	(Number of years)				*(Percentage)*
Afghanistan		5	10	15	20
Angola	1	11		12	30
Burundi		14	1	15	32
Central African Republic		8		8	13
Chad	2	4	3	9	23
Congo		13		13	22
Côte d'Ivoire		9		9	15
Democratic People's Republic of Korea	6	3	6	15	47
Democratic Republic of the Congo		15		15	27
Eritrea	2	3	10	15	30
Ethiopia	2	2	11	15	21
Guinea		10		10	16
Haiti	11	1	3	15	11
Iraq		4	11	15	14
Kenya	9		3	12	14
Liberia		14	1	15	33
Sierra Leone		15		15	19
Somalia			15	15	64
Sudan		5	10	15	62
Tajikistan	3		8	11	13
Uganda		4	10	14	10
Zimbabwe	2	3	5	10	31

Sources: FAO GIEWS and Development Initiatives.

UN WFP/FAO, *The State of Food Insecurity in the World*, 2010, p. 13.

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

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

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Ethnic, Sectarian, Tribal, and Regional Differences

- Deep and growing divisions at sectarian extremes, Sunni and Shi'ite.
- Tribal, sectarian, ethnic, and linguistic differences tend to cluster, and reflect government favoritism and wealth/income differences.
- Mixed record in both correcting historical problems and offering clear path of hope for the future.
- Tensions made worse by resource and demographic pressures.
- Violent extremism feeds on these differences.

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Key Ethnic and Sectarian Differences by Country: North Africa

Algeria

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

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

Language: Arabic (official), French, Berber dialects

Libya

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

Religion: Sunni Muslim 97%, other 3%

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

Morocco

Ethnicity: Arab-Berber 99.1%, other 0.7%, Jewish 0.2% (Western Sahara has 507,160; Arab, Berber

Religion: Muslim 98.7%, Christian 1.1%, Jewish 0.2%

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

Tunisia

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

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

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

CIA World Factbook, accessed April 22, 2011

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

Egypt

Ethnicity 99.6%, other 0.4% (2006 census)

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

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

Israel

Ethnicity: Jewish 76.4% (of which Israel-born 67.1%, Europe/America-born 22.6%, Africa-born 5.9%, Asia-born 4.2%), non-Jewish 23.6% (mostly Arab) (2004). Approximately 296,700 Israeli settlers live in the West Bank (2009 est.); approximately 19,100 Israeli settlers live in the Golan Heights (2008 est.); approximately 192,800 Israeli settlers live in East Jerusalem (2008 est.) (July 2011 est.). IDPs: 150,000-420,000 (Arab villagers displaced from homes in northern Israel) (2007)

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

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

Gaza Strip

Ethnicity: Palestinian Arab: 1,657,155 (July 2011 est.)

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

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

West Bank

Ethnicity: 2,568,555 (July 2010 est.) Palestinian Arab and other 83%, Jewish 17%.

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

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

CIA World Factbook, accessed April 22, 2011

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

Jordan

Ethnicity: Arab 98%, Circassian 1%, Armenian 1%; approximately two million Iraqis have fled the conflict in Iraq, with the majority taking refuge in Syria and Jordan.

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

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

Lebanon

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

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

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

Syria

Ethnicity: Arab 90.3%, Kurds, Armenians, and other 9.7%. *note:* approximately 19,100 Israeli settlers live in the Golan Heights (2008 est.) (July 2011 est.)

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

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

CIA World Factbook, accessed April 22, 2011

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

Bahrain

Ethnicity: Population 1,214,705*;* includes 235,108 non-nationals (July 2011 est.); Bahraini 62.4%, non-Bahraini 37.6% (2001 census). 44% of the population in the 15-64 age group is non-national (2010 est.)

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

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

Iran

Ethnicity: Persian 51%, Azeri 24%, Gilaki and Mazandarani 8%, Kurd 7%, Arab 3%, Lur 2%, Baloch 2%, Turkmen 2%, other 1%

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

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

Iraq

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

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

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

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

CIA World Factbook, accessed April 22, 2011

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

Kuwait

Ethnicity: Population: 2,595,628; *note:* includes 1,291,354 non-nationals (July 2011 est.). Kuwaiti 45%, other Arab 35%, South Asian 9%, Iranian 4%, other 7%. non-Kuwaitis represent about 60% of the labor force (2010 est.)

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

Language: Arabic (official), English widely spoken.

Oman

Ethnicity: Arab, Baluchi, South Asian (Indian, Pakistani, Sri Lankan, Bangladeshi), African. Population is 3,027,959; *note:* includes 577,293 non-nationals (July 2011 est.). *A*bout 60% of the labor force is non-national (2007)

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

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

Qatar

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

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

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

Saudi Arabia

Ethnicity: Population is 26,131,703*:* includes 5,576,076 non-nationals (July 2011 est.). Arab 90%, Afro-Asian 10%. About 80% of the 7.7 million labor force is non-national (2010 est.)

Religion: Muslim 100%

Language: Arabic (official).

CIA World Factbook, accessed April 22, 2011

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

UAE

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

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

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

Yemen

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

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

Language: Arabic (official)

CIA World Factbook, accessed April 22, 2011

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Popular Perceptions of Equal Treatment from Fellow Citizens

(in %)

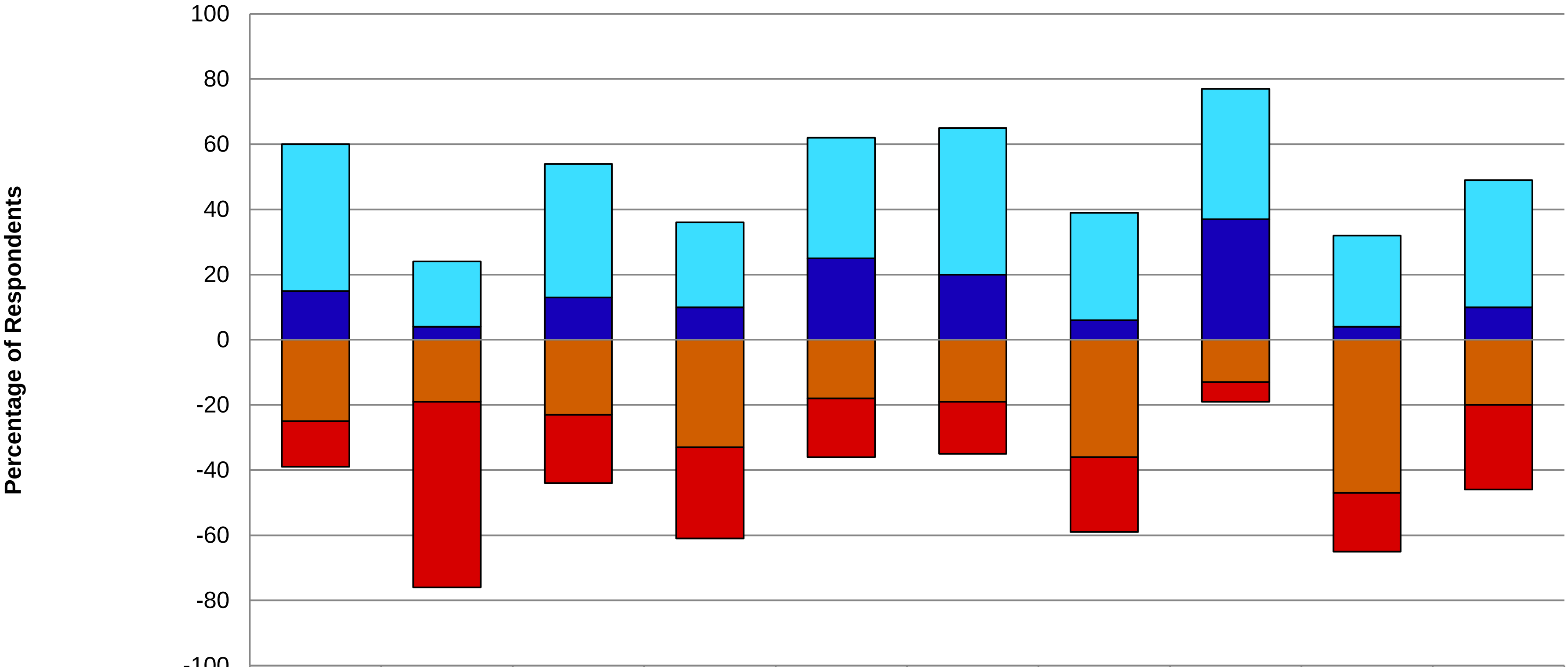
Figure 56

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

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

Popular Perception of Equal Treatment From Fellow Citizens

Figure 57



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

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

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

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

Rapid Social Change and Uncertainty and Risk

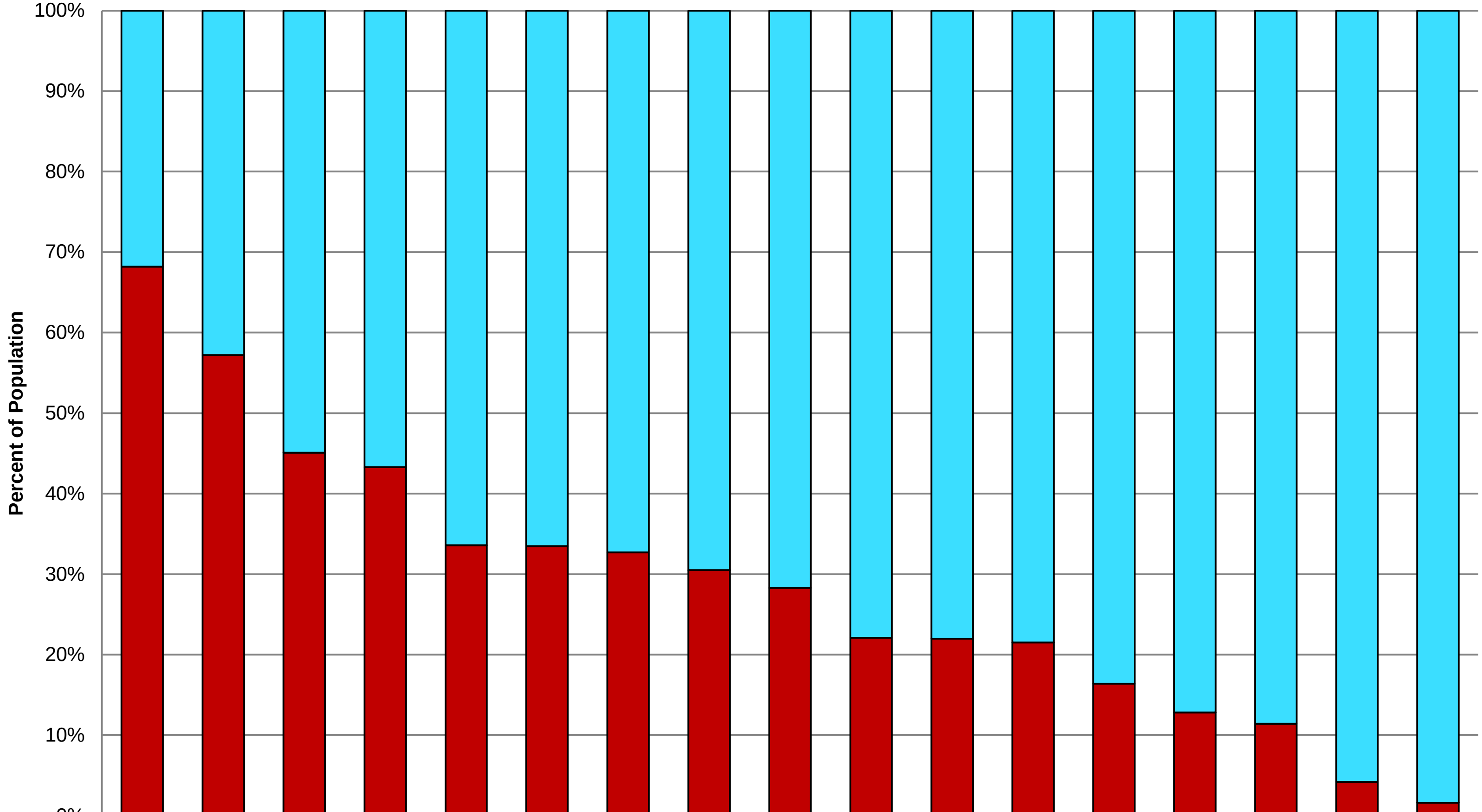
Past social norms, social stability, status, roles, and leadership elites often replaced by constant change in unstable socially anonymous conditions

Social Change, Hyperurbanization, Media, Education

- Hyperurbanization and relocation changes values, patterns of stability and security – infrastructure, dislocation, housing, and community stresses,
- Exposure to global and regional media is beyond government control and steadily raises expectations while criticizing regimes.
- Educational standards may not keep up, but more and more of population has secondary or university education.
- Economic and governance failures challenge secularism, modernization at the popular level.
- Major questions about the role of women, marriage, family stability and security.

Urban-Rural Split by Country
(In Percent)

Figure 58



	Yemen, Rep.	Egypt, Arab Rep.	Syrian Arab Republic	Morocco	Iraq	Algeria	Tunisia	Iran, Islamic Rep.	Oman	Libya	United Arab Emirates	Jordan	Saudi Arabia	Lebanon	Bahrain	Qatar	Kuwait
2010 Urban Population	32	43	55	57	66	67	67	70	72	78	78	79	84	87	89	96	98
2010 Rural Population	68	57	45	43	34	34	33	31	28	22	22	22	16	13	11	4	2

Source: World Bank, "World Development Indicators," Accessed 2 February 2012.
http://data.worldbank.org/indicator/SP.RUR.TOTL.ZS

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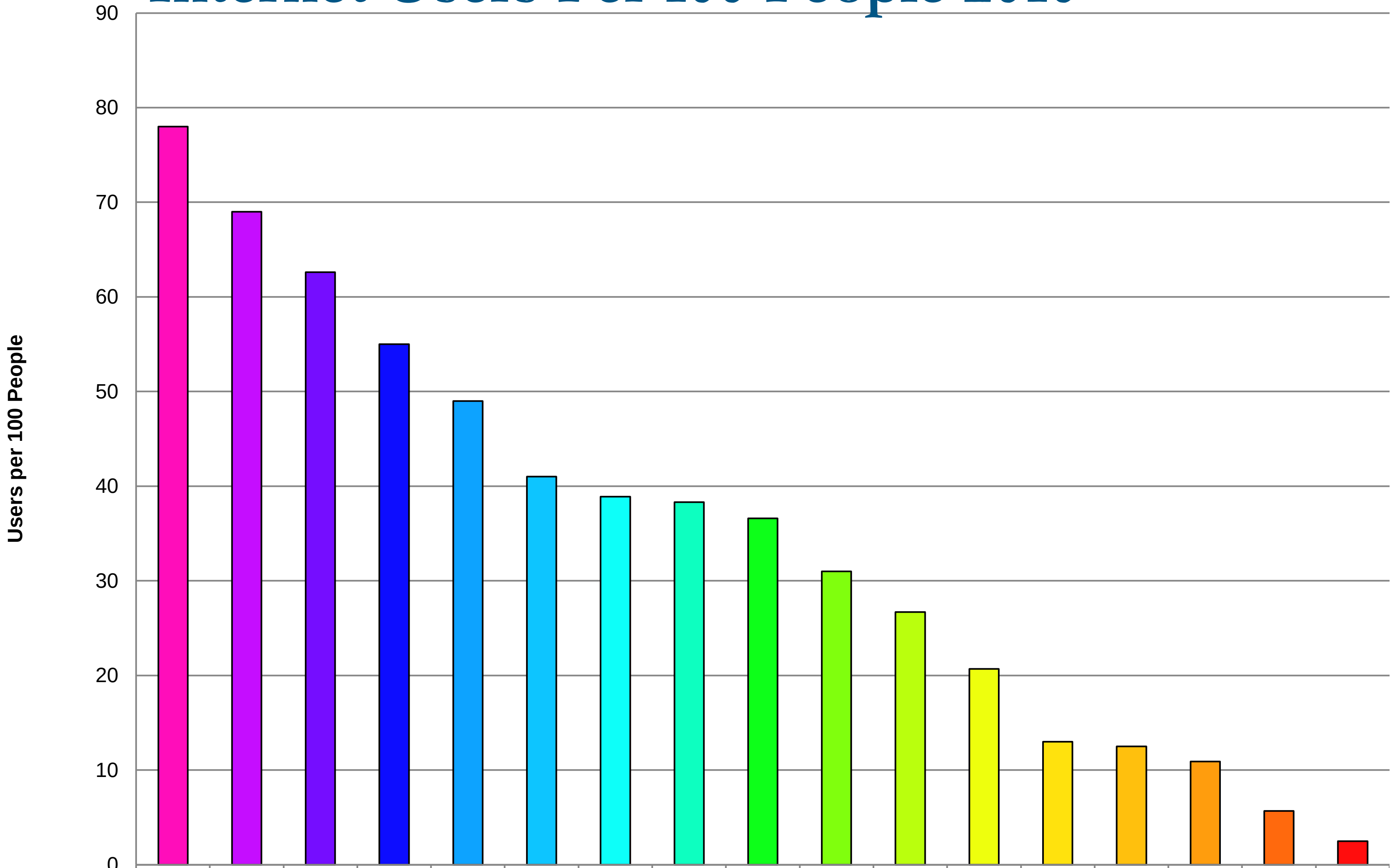
Internet Users Per 100 People 2010

Figure 59



	UAE	Qatar	Oman	Bahrain	Morocco	Saudi Arabia	Jordan	Kuwait	Tunisia	Lebanon	Egypt	Syria	Iran	Algeria	Yemen	Libya	Iraq
Internet Users Per 100 People	78	69	62.6	55	49	41	38.9	38.3	36.6	31	26.7	20.7	13	12.5	10.9	5.7	2.5

The World Bank, dataBank, Accessed 1/25/2012.
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

Excessive Security, Weak Rule of Law, and Sometimes Repression

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

Civil Challenges to Stability

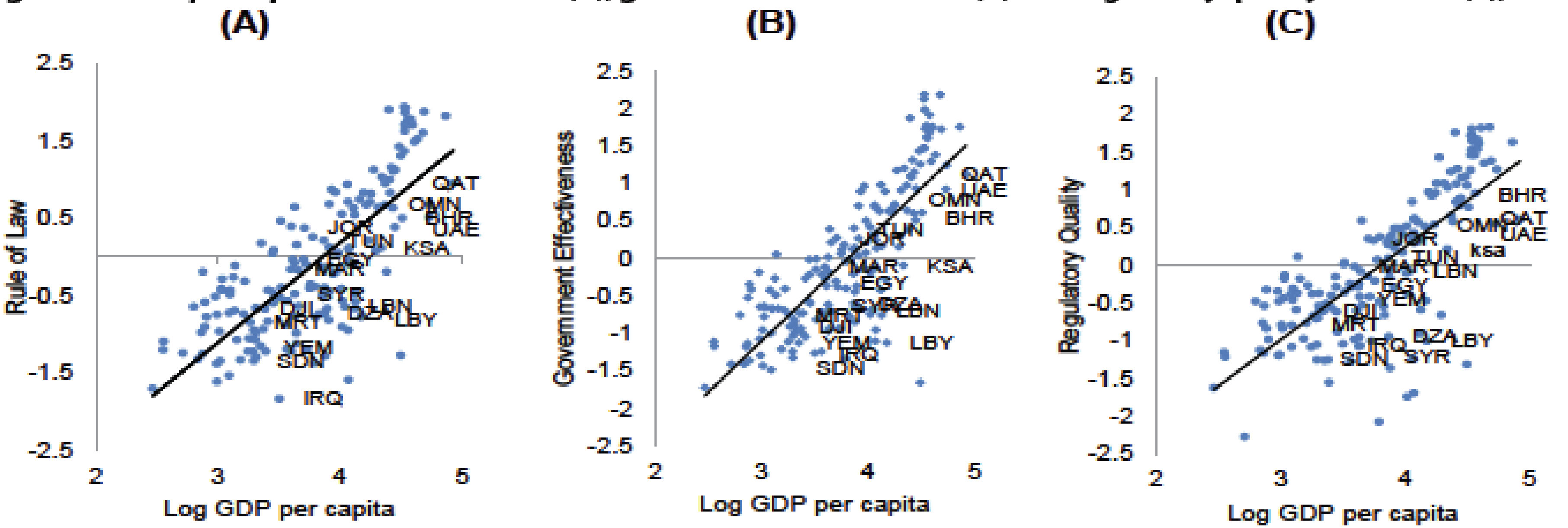
- **Rigid and/or Repressive Regimes; Lack of Peaceful Civil and Political Alternatives.**
- **Problems with Security Forces Police and Rule of Law.**
- **Ethnic, Sectarian, Tribal, and Regional Differences.**
- **Major Demographic Pressures – Youth Bulge.**
- **Social Change, Hyperurbanization, Media,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

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

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

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

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



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

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

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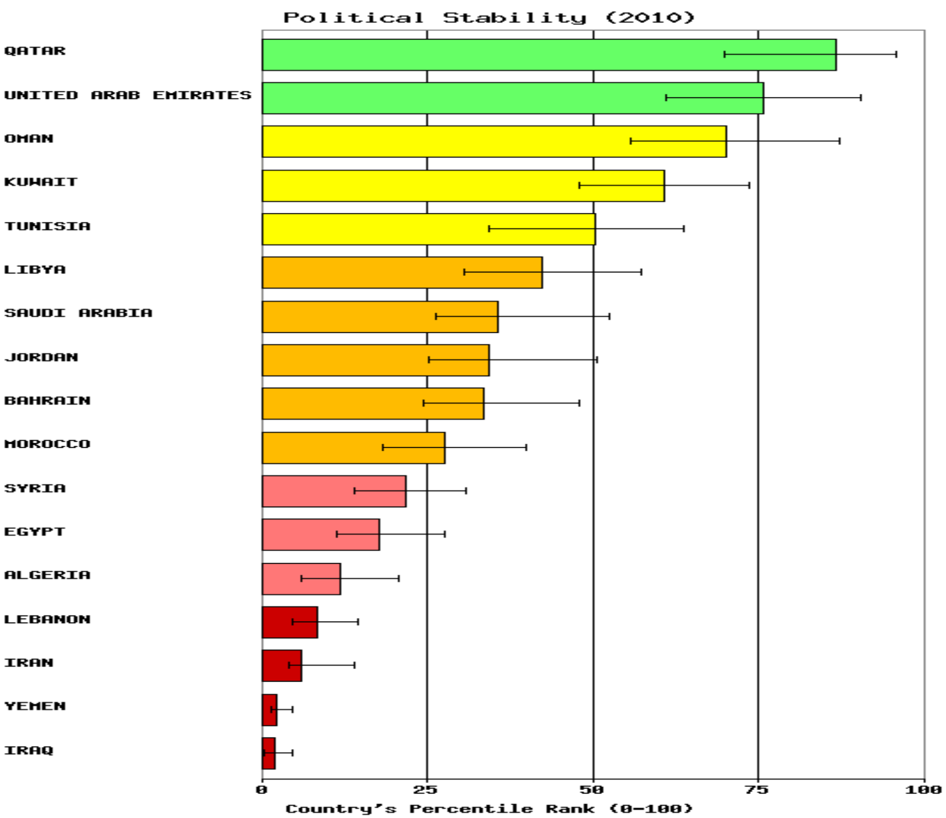
Political Stability (by world percentile)

Figure 60



Source: Kaufmann D., A. Kraay, and M. Mastruzzi (2010), The Worldwide Governance Indicators: Methodology and Analytical Issues
Note: The governance indicators presented here aggregate the views on the quality of governance provided by a large number of enterprise, citizen and expert survey respondents in industrial and developing countries. These data are gathered from a number of survey institutes, think tanks, non-governmental organizations, and international organizations. The WGI do not reflect the official views of the World Bank, its Executive Directors, or the countries they represent. The WGI are not used by the World Bank Group to allocate resources.

Country	Sources	Year	Percentile Rank (0-100)	Governance Score (-2.5 to +2.5)	Standard Error
ALGERIA	7	2010	11.8	-1.25	0.23
BAHRAIN	7	2010	33.5	-0.34	0.23
EGYPT	7	2010	17.9	-0.91	0.23
IRAN	6	2010	6.1	-1.57	0.24
IRAQ	5	2010	1.9	-2.27	0.27
JORDAN	8	2010	34.4	-0.27	0.23
KUWAIT	7	2010	60.8	0.43	0.23
LEBANON	7	2010	8.5	-1.53	0.23
LIBYA	7	2010	42.5	-0.06	0.23
MOROCCO	7	2010	27.8	-0.52	0.23
OMAN	7	2010	70.3	0.69	0.23
QATAR	8	2010	86.8	1.06	0.23
SAUDI ARABIA	7	2010	35.8	-0.23	0.23
SYRIA	7	2010	21.7	-0.81	0.23
TUNISIA	7	2010	50.5	0.1	0.23
UNITED ARAB EMIRATES	7	2010	75.9	0.82	0.23
YEMEN	6	2010	2.4	-2.22	0.24

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

The World Bank, World Governance Indicators Project, Accessed January 2012.
http://info.worldbank.org/governance/wgi/mc_chart.asp

Popular Perceptions of State Institutions

Figure 61

Popular Trust of the Government (Cabinet)

(in %)

	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I trust it to a great extent	26	5	16	9	25	43	7	54	5	19
I trust it to a medium extent	46	15	36	20	31	35	24	28	35	43
I trust it to a limited extent	16	22	14	29	16	9	35	13	29	14
I absolutely do not trust it	10	58	29	38	25	9	33	2	29	18
I don't know/ declined to answer	2	1	4	4	2	3	3	3	1	6

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

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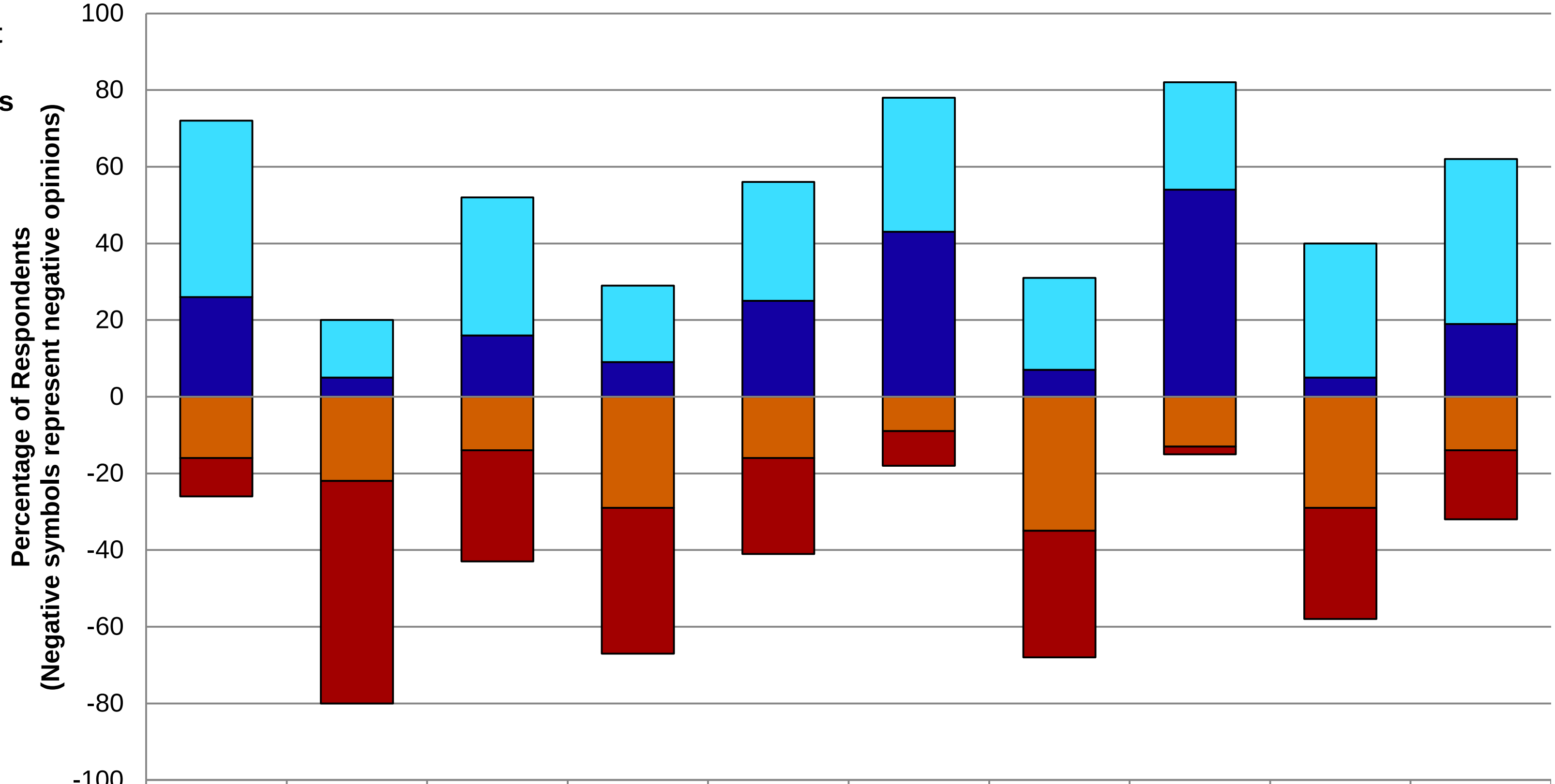
Popular Perceptions of State Institutions:

Popular Trust in the Government (Cabinet)

Figure 62

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



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

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

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Popular Perceptions of State Institutions

Figure 63

Popular Trust of the Judiciary (the Courts)

(in %)

	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I trust it to a great extent	40	8	20	11	35	55	9	60	11	16
I trust it to a medium extent	42	17	36	24	35	30	35	23	43	35
I trust it to a limited extent	10	21	12	30	17	7	31	11	23	16
I absolutely do not trust it	5	54	26	31	11	5	22	4	19	23
I don't know/ declined to answer	3	1	6	4	2	3	2	3	3	10

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

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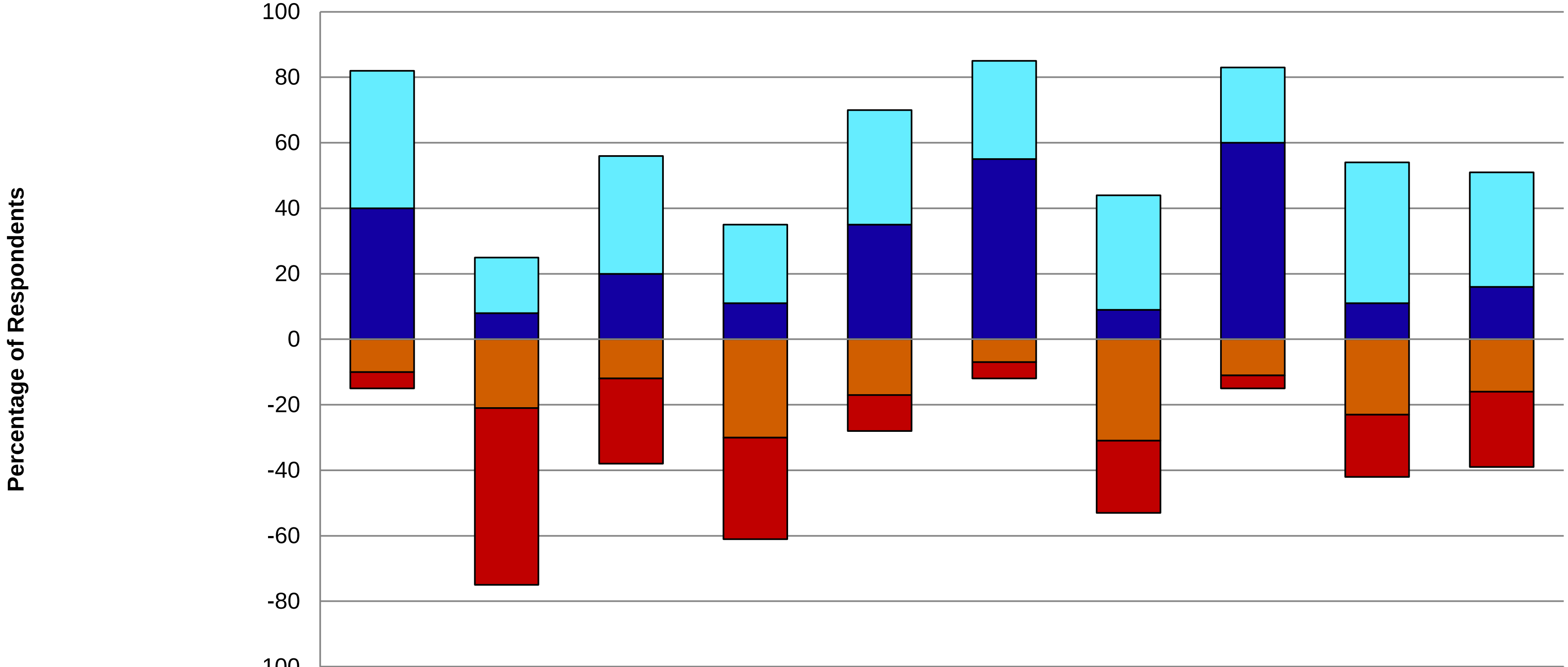
Popular Perceptions of State Institutions:

Popular Trust in the Judiciary

Figure 64

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



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

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

Popular Perceptions of State Institutions

Figure 65

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

(in %)

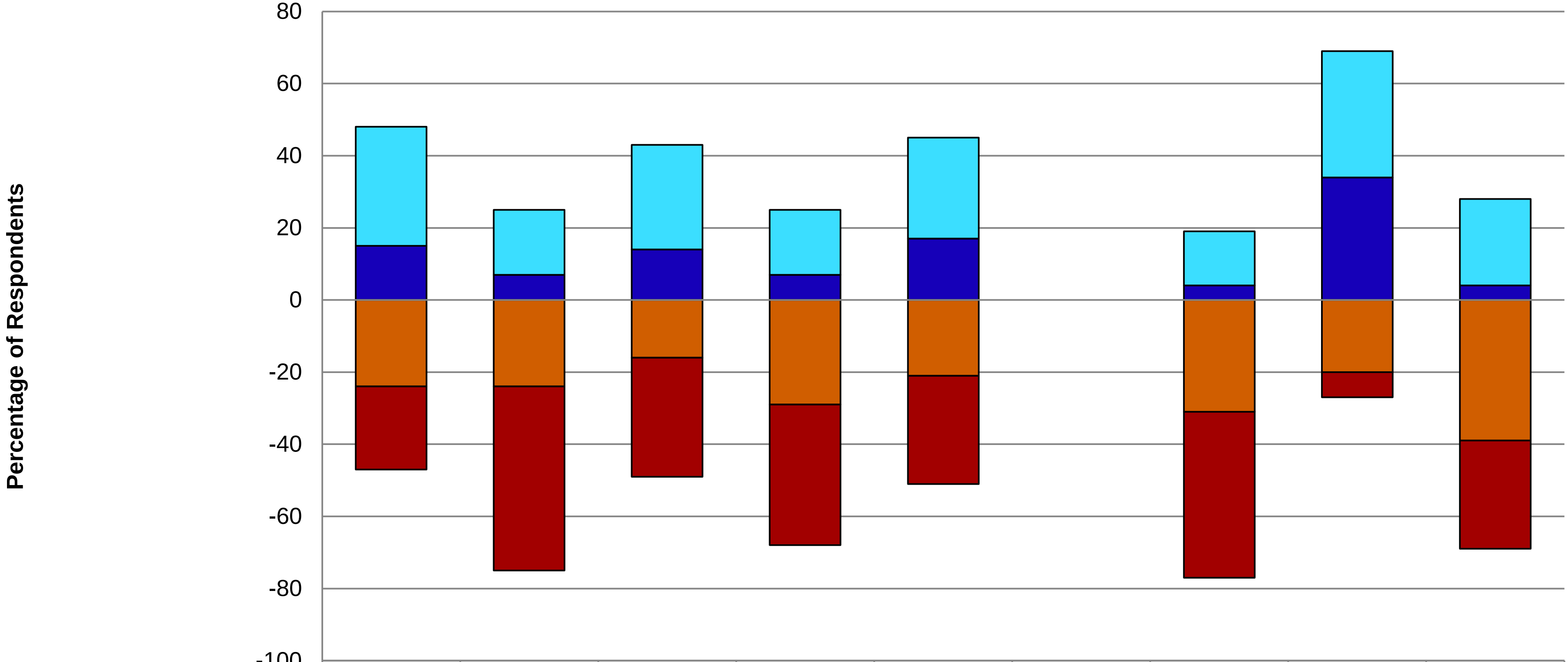
	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I trust it to a great extent	15	7	14	7	17		4	34	4	
I trust it to a medium extent	33	18	29	18	28		15	35	24	
I trust it to a limited extent	24	24	16	29	21		31	20	39	
I absolutely do not trust it	23	51	33	39	30		46	7	30	
I don't know/ declined to answer	5	1	8	6	6		5	4	2	

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

Popular Perceptions of State Institutions:

Figure 66 Popular Trust in the Elected Council of Representatives (the Parliament)

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



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

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

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Popular Perceptions of State Institutions

Figure 67

Popular Trust in the Armed Forces (the Army)

(in %)

	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I trust it to a great extent	61	64	20	24	48	80	23	54	24	73
I trust it to a medium extent	27	16	34	28	26	15	31	25	44	16
I trust it to a limited extent	7	5	13	21	13	2	25	9	20	3
I absolutely do not trust it	2	15	26	20	10	1	19	3	19	4
I don't know/ declined to answer	3	0	6	7	3	2	2	9	1	4

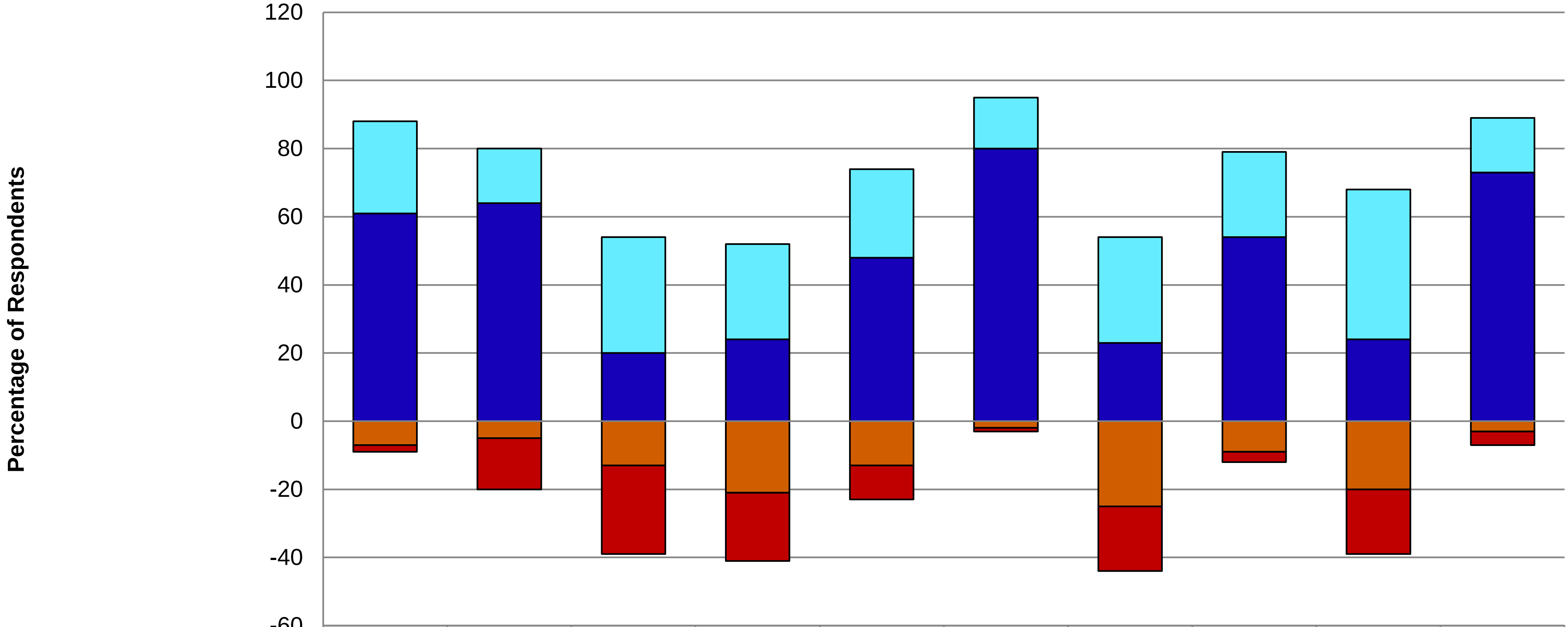
Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 6.

Popular Perceptions of State Institutions:

Popular Trust in the Armed Forces (the Army)

Figure 68

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



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

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

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Popular Perceptions of State Institutions

Figure 69

Popular Trust in the Public Security Forces (the Police)

(in %)

	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
I trust it to a great extent	57	9	26	11	32	22	13	38	18	19
I trust it to a medium extent	30	22	35	24	25	32	35	34	50	39
I trust it to a limited extent	7	23	12	24	19	26	31	11	21	15
I absolutely do not trust it	4	45	24	37	21	18	19	4	10	21
I don't know/ declined to answer	2	0	3	4	2	2	2	3	1	5

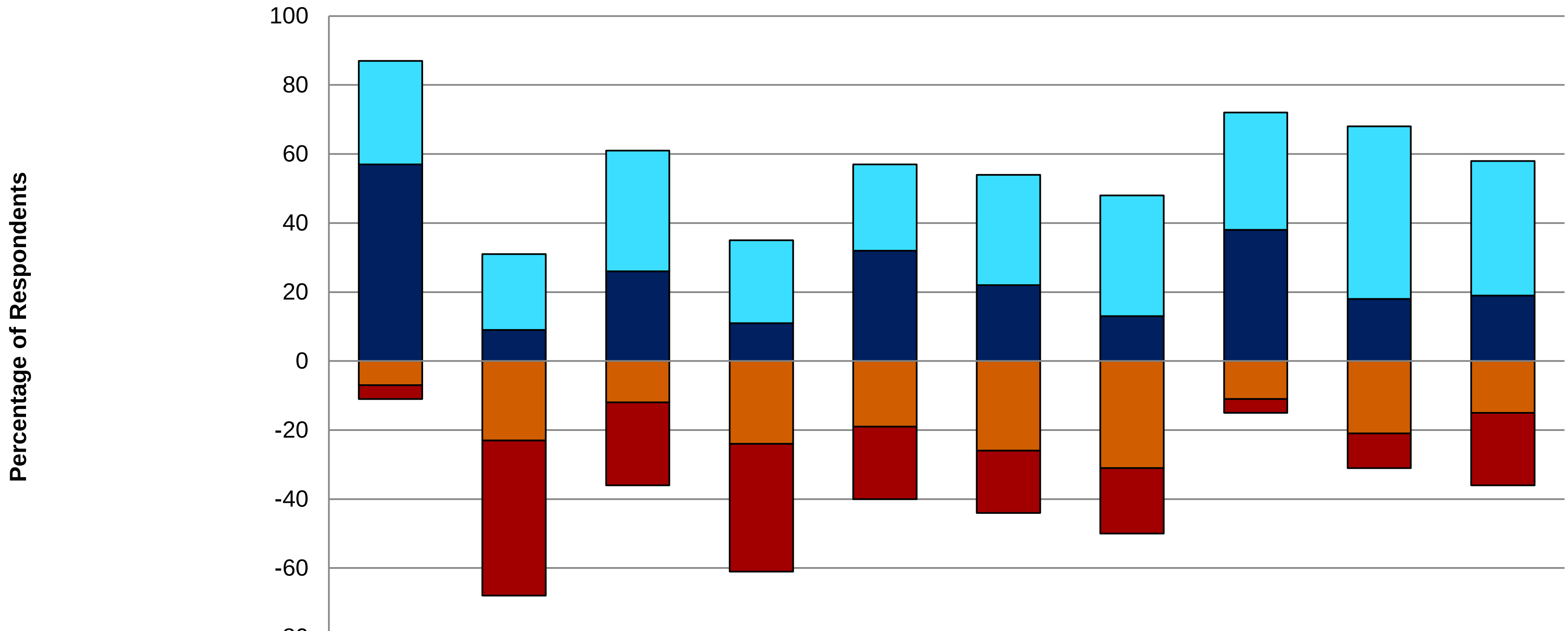
Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 7.

Popular Perceptions of State Institutions:

Popular Trust in the Public Security Forces (the Police)

Figure 70

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



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

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

Democracy Index 2011

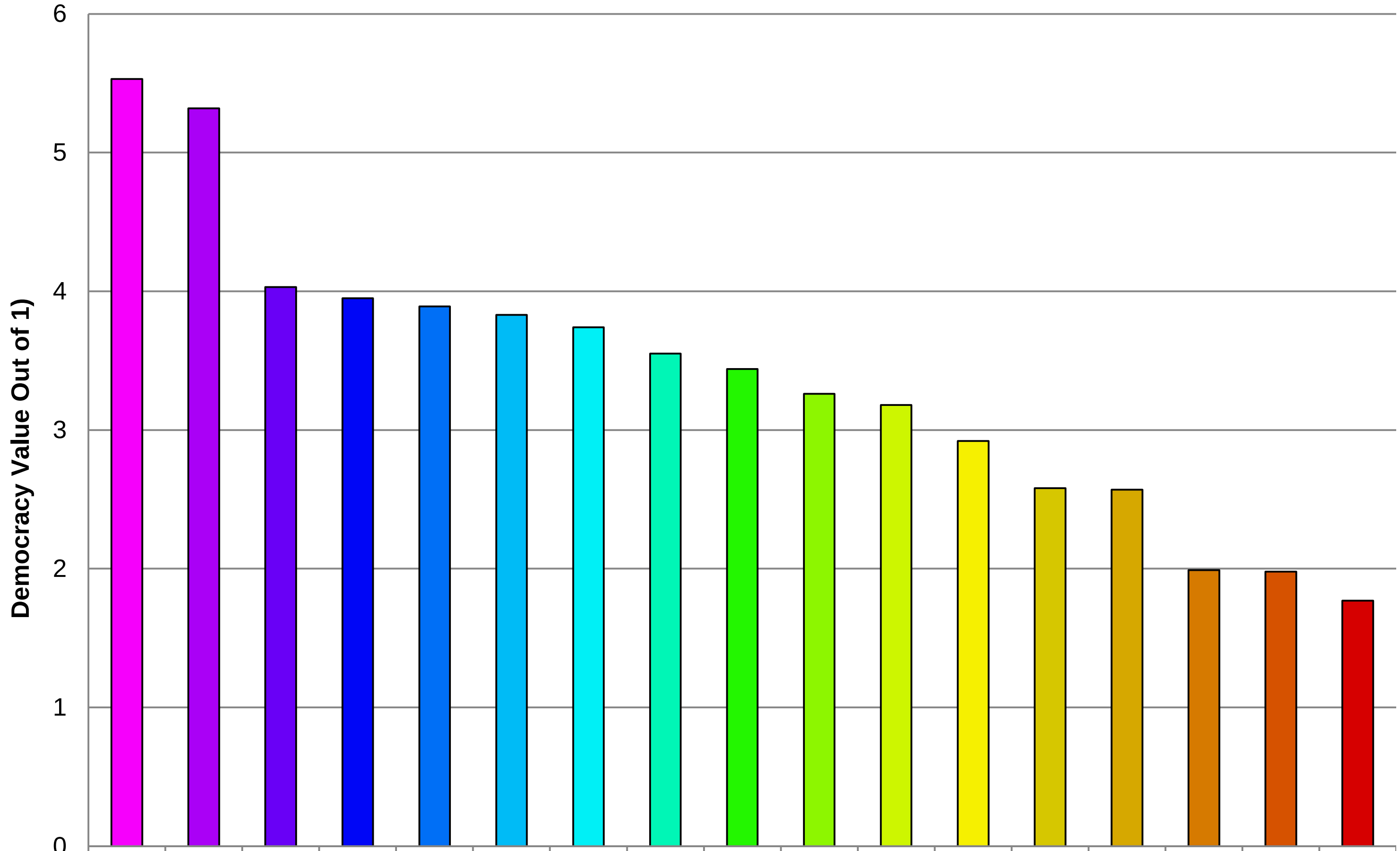
Figure 71

Full democracies--scores of 8-10

Flawed democracies--score of 6 to 7.9

Hybrid regimes--scores of 4 to 5.9

Authoritarian regimes--scores below 4



	Tunisia	Lebanon	Iraq	Egypt	Jordan	Morocco	Kuwait	Libya	Algeria	Oman	Qatar	Bahrain	UAE	Yemen	Syria	Iran	Saudi Arabia
Democracy Rating 2011	5.53	5.32	4.03	3.95	3.89	3.83	3.74	3.55	3.44	3.26	3.18	2.92	2.58	2.57	1.99	1.98	1.77

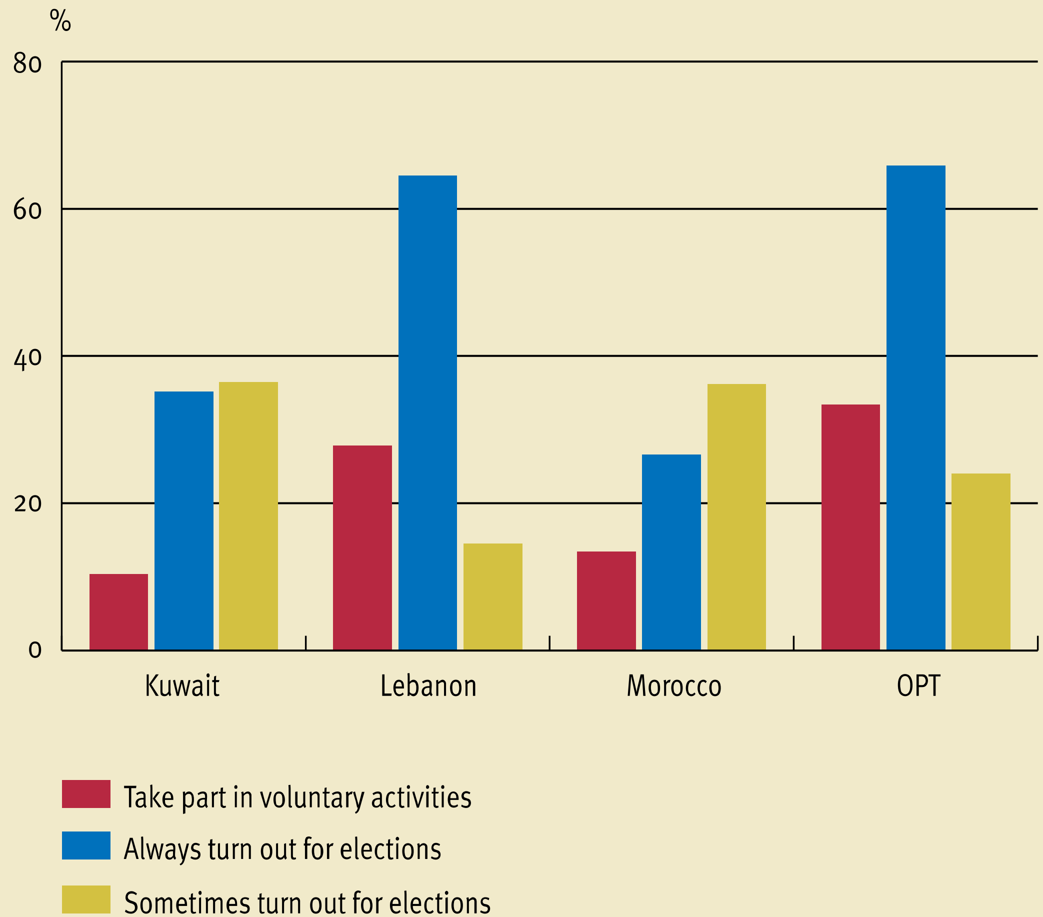
The Economist Intelligence Unit's Index of Democracy, on a 0 to 10 scale, is based on the ratings for 60 indicators grouped in five categories: electoral process and pluralism; civil liberties; the functioning of government; political participation; and political culture. Each category has a rating on a 0 to 10 scale, and the overall index of democracy is the simple average of the five category indexes.

Source: Economist Intelligence Unit, *Democracy Index 2011,* Accessed January, 2012.
http://www.eiu.com/Handlers/WhitepaperHandler.ashx?fi=Democracy_Index_Final_Dec_2011.pdf&mode=wp

Figure 72

Political Participation vs. Voter Apathy

Among the four countries sampled, the survey revealed comparatively low interest in elections among citizens in Morocco, one of those Arab states that have made most progress towards political liberalisation. Evidently, for this group of citizens, participating in elections was no longer considered a novel or decisive way to influence the course of the state. Interest, as indicated by turnout, was higher in two countries where popular political participation has recently consolidated the rise of sectarian forces (Lebanon), or the deepening of political schism (Palestine). In Kuwait, the small proportion of the sample interested in voluntary activities and political participation suggests quite a degree of public apathy.



Source: Arab Development Report, 2009, p. 74.

Voter Participation: 2003-2008

Figure 73

State	Parliamentary	Presidential	Local
Algeria	35.5% (2007)	59.3% (2004)	--
Bahrain	72% and 73.6% (two rounds in 2006)	--	61% (2006)
Djibouti	72.6% (2008)	78.9% (2005)	--
Egypt	31.2% (2007) 28.1% (2005)	23% (2005)	--
Iraq	79.6% (2005)	--	--
Jordan	54% (2007)	--	56% (2007)
Kuwait	59.4% (2008)	--	Less than 50% (2005)
Lebanon	46.4% (2005)	--	--
Mauritania	73.4% and 69.4% (two rounds in 2006) 98.2% and 97.9% (two rounds in 2007)	70.1% and 67.5% (two rounds in 2007)	73.4 and 69.4% (two rounds in 2006)

Figure 74

State	Parliamentary	Presidential	Local
Morocco	37% (2007)	--	54% (2003)
Oman	62.7% (2007)	--	--
OPT	77.6% (2006)	66.5% (2005)	--
Qatar	--	--	30% (2007)
Saudi Arabia	--	--	70% (2005)
Sudan	--	86% (2000)	--
Syria	56% (2007)	95.8% (2007)	49.5% and 37.8% (2007)
Tunisia	91.4% (2004)	91.5% (2004)	82.7% (2005)
Yemen	75.9% (2003)	65.1% (2006)	65% (2006)

Source: UNDP/RBAS 2008; IPU 2008; Egypt SIS 2008 et al. (See Statistical references).

Source: Arab Development Report, 2009, p. 74.

Popular Use of the Internet for Political Purposes

Figure 75

(in %)

	Jordan	Lebanon	Palestine	Yemen	Sudan	Egypt	Algeria	Saudi Arabia	Iraq	Tunisia
Find out about Political Activities Taking Place in Your Community	11	13	19	13	20	13	12	25	9	14
Express Your Opinion About Political Issues	7	8	12	9	12	9	6	10	6	10
Find Out About Opposing Political Opinions in Your Country	9	11	19	13	19	13	12	20	6	13

Arab Reform Initiative Arab Democracy Barometer, Saud al-Sarhan, "Data Explanation of Why There Was No 'Day of Rage' in Saudi Arabia," delivered at *The Rahmania Annual Seminar* 1/11-13/2012. p. 9.

Problems with Rules of Law, Security Forces, and Police

- Arguably, greater concern with “justice” than “democracy.”
- Special courts, internal security services, poor policing - major problems.
- Detention facilities often a critical problem area.
- Recent growth of paramilitary and CT forces is sometimes done without the actions of improving conditions, showing necessary restraint.

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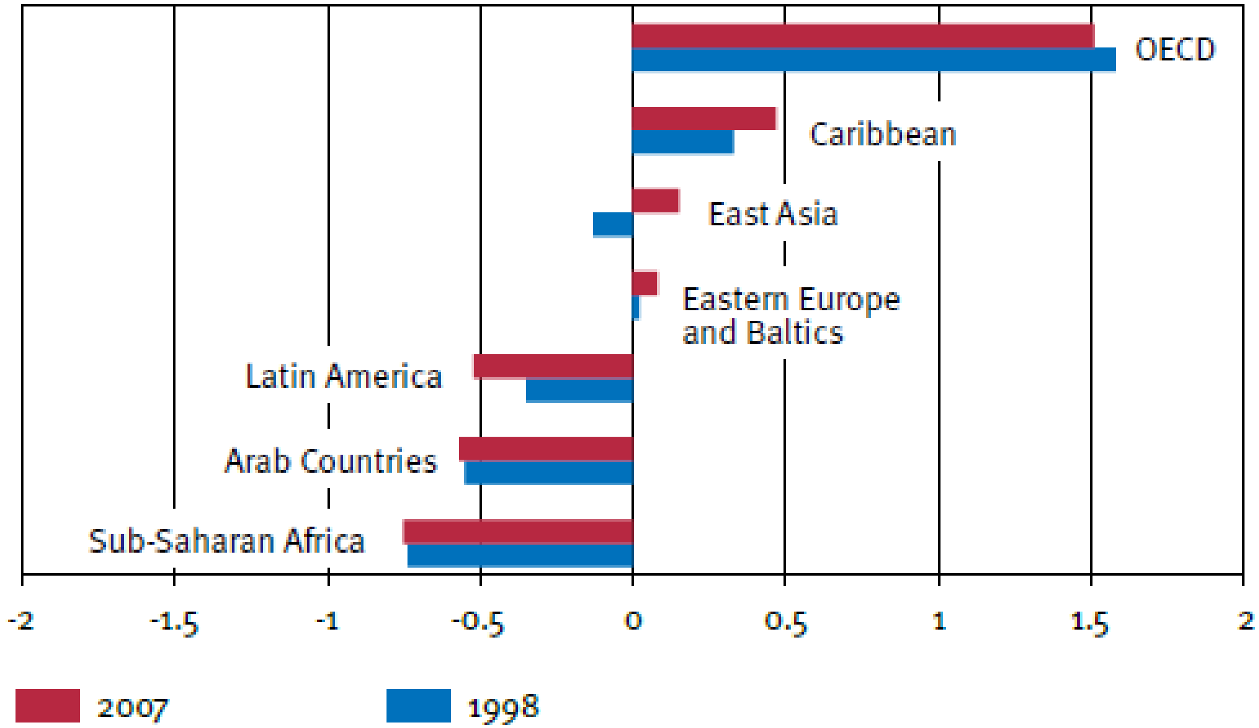
Comparative Rule of Law by Region

Figure 76



Source: UNDP/AHDR calculations based on World Bank 2008.

Note: The rule of law governance indicator has a range of -2.5 to 2.5; higher is better. It is a subjective indicator aggregated from a variety of sources and measuring perceptions of the following concepts: legal impartiality and popular observance of the law.

Source: Arab Development Report, 2009, p. 65.

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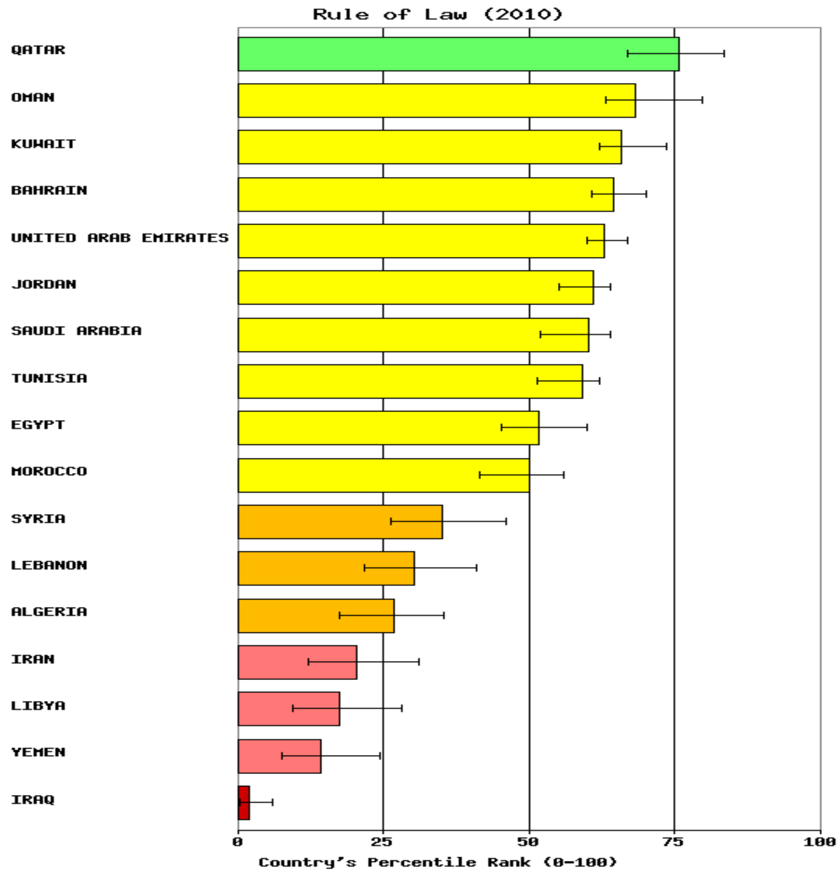
Rule of Law

Figure 77



Source: Kaufmann D., A. Kraay, and M. Mastruzzi (2010), The Worldwide Governance Indicators: Methodology and Analytical Issues
Note: The governance indicators presented here aggregate the views on the quality of governance provided by a large number of enterprise, citizen and expert survey respondents in industrial and developing countries. These data are gathered from a number of survey institutes, think tanks, non-governmental organizations, and international organizations. The WGI do not reflect the official views of the World Bank, its Executive Directors, or the countries they represent. The WGI are not used by the World Bank Group to allocate resources.

Figure 78

Country	Sources	Year	Percentile Rank (0-100)	Governance Score (-2.5 to +2.5)	Standard Error
ALGERIA	14	2010	27	-0.76	0.14
BAHRAIN	11	2010	64.5	0.45	0.16
EGYPT	15	2010	51.7	-0.11	0.14
IRAN	10	2010	20.4	-0.9	0.16
IRAQ	10	2010	1.9	-1.62	0.17
JORDAN	14	2010	61.1	0.22	0.14
KUWAIT	10	2010	65.9	0.54	0.16
LEBANON	14	2010	30.3	-0.66	0.14
LIBYA	11	2010	17.5	-0.98	0.15
MOROCCO	15	2010	50.2	-0.19	0.14
OMAN	9	2010	68.2	0.67	0.16
QATAR	12	2010	75.8	0.87	0.15
SAUDI ARABIA	11	2010	60.2	0.16	0.16
SYRIA	14	2010	35.1	-0.54	0.14
TUNISIA	14	2010	59.2	0.11	0.14
UNITED ARAB EMIRATES	11	2010	63	0.39	0.16
YEMEN	13	2010	14.2	-1.05	0.15

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

The World Bank, World Governance Indicators Project, Accessed January, 2010.
http://info.worldbank.org/governance/wgi/mc_chart.asp

Ranking Rule of Law in Comparison with 139 Countries World Wide (as of 2010)

Institutions	Country rank/139							
	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Libya	Morocco
Judicial Independence	112	34	63	48	36	113	95	79
Favouritism in decisions of government officials	82	42	95	44	47	136	122	52

Source: WEF

Judicial independence is the last line of defence and is pivotal for the effectiveness of accountability tools, especially when those who are to be held accountable are either politically or economically powerful, or both. The World Competitiveness Index of the World Economic Forum, which ranks 14 Arab countries among 139 countries worldwide, registered in 2010 three Arab countries in the upper 1/3 on lack of judicial independence (relative to the rest of the sample).Two of those three Arab countries ranked in the upper 1/3 on favouritism of decision by government officials (i.e. high favouritism relative to others in the sample).

UNDP, Arab Development challenges Report, 2011, United Nations Development Programme, Regional Centre for Arab States, Cairo, 1191 Corniche El Nil, World Trade Centre, Boulac, Cairo, Egypt, pp. 70.

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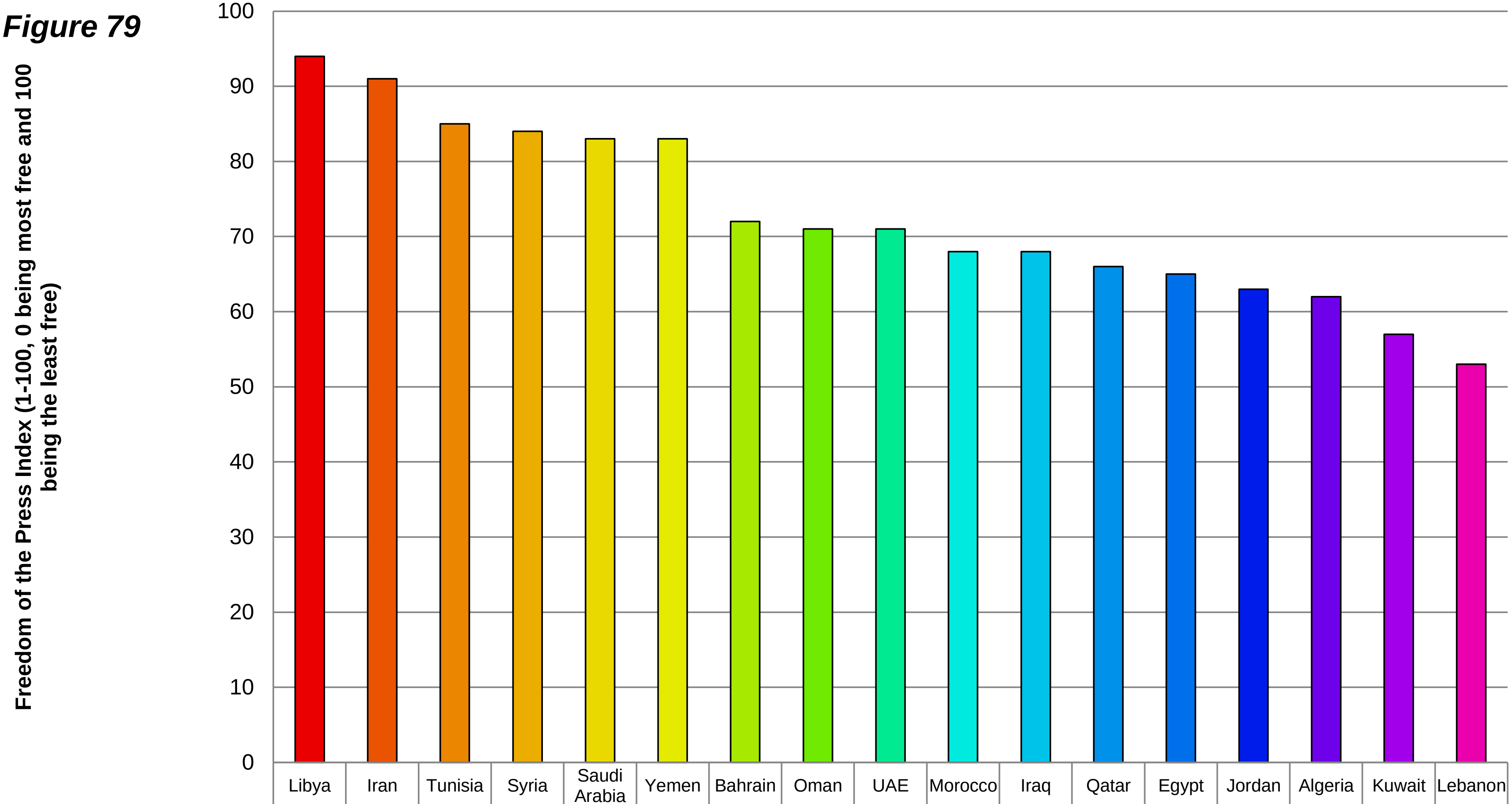
Press Freedom Index

Figure 79



	Libya	Iran	Tunisia	Syria	Saudi Arabia	Yemen	Bahrain	Oman	UAE	Morocco	Iraq	Qatar	Egypt	Jordan	Algeria	Kuwait	Lebanon
Freedom of the Press 2011	94	91	85	84	83	83	72	71	71	68	68	66	65	63	62	57	53

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

Source: Freedom House, Freedom of the Press 2011, Accessed February 2, 2012.
http://www.freedomhouse.org/report/freedom-press/freedom-press-2011

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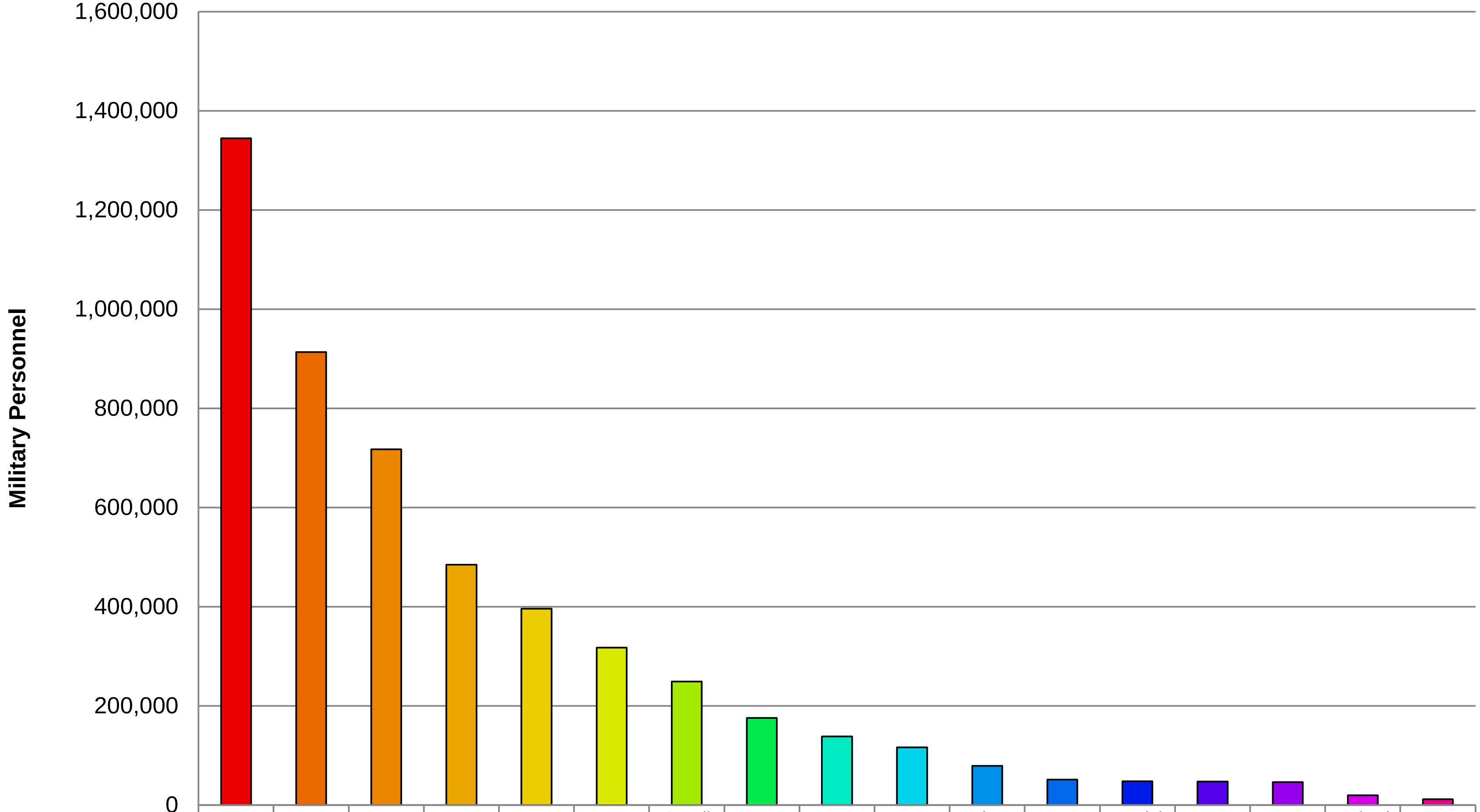
Excessively Large Paramilitary and National Security Forces

Figure 80

Total Military Establishment



	Egypt	Iran	Syria	Algeria	Morocco	Iraq	Saudi Arabia	Jordan	Yemen	Libya	Lebanon	UAE	Tunisia	Oman	Kuwait	Bahrain	Qatar
Total Military Establishment	1,344,5	913,000	717,000	484,200	395,800	317,344	249,000	175,500	137,900	116,000	79,100	51,000	47,800	47,000	46,300	19,460	11,800

Source: IISS, *Military Balance 2011*, Chapter 7.

Arab Development Report Security Measures - II

Figure 81

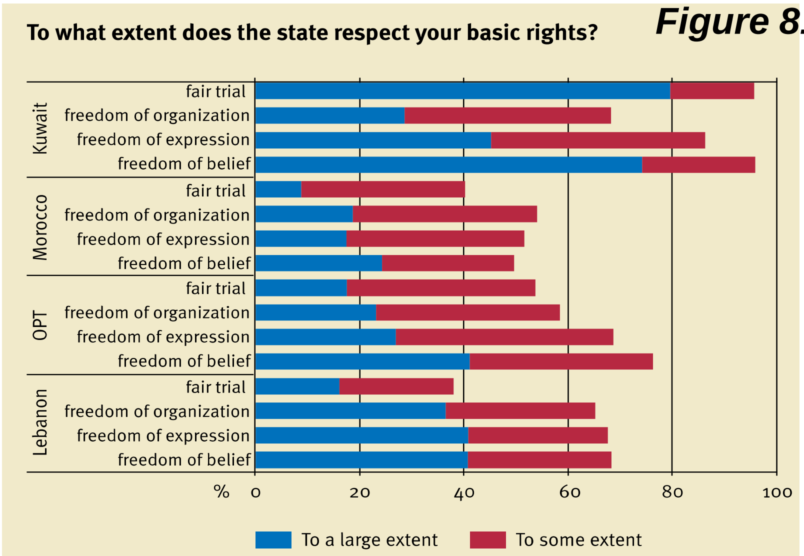


Figure 82

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

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

Source: AOHR 2008 (in Arabic).

Figure 83

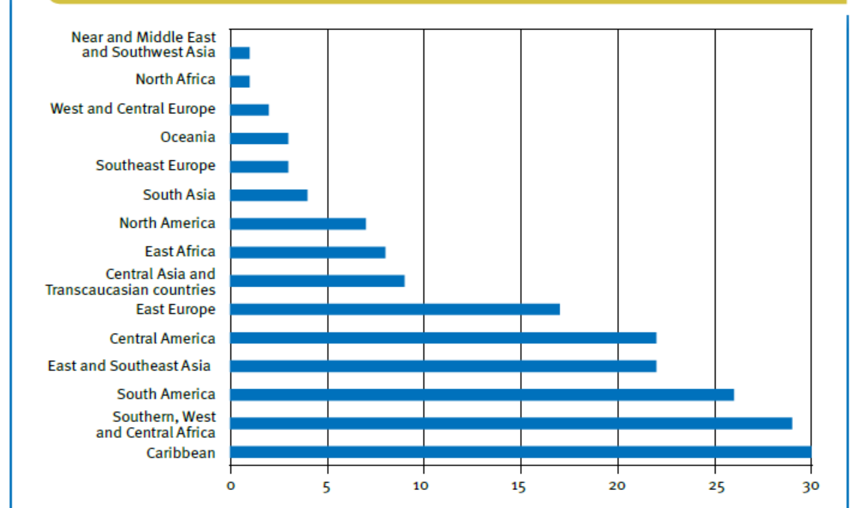
Table 3-2 Political prisoners in 5 Arab states, 2005 and 2007

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

Source: AOHR 2008 (in Arabic).

Figure 84

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



Source: UNODC 2005.

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

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Problems in Governance – I
Corruption, Inefficient State Sectors, Barriers to Business and Growth

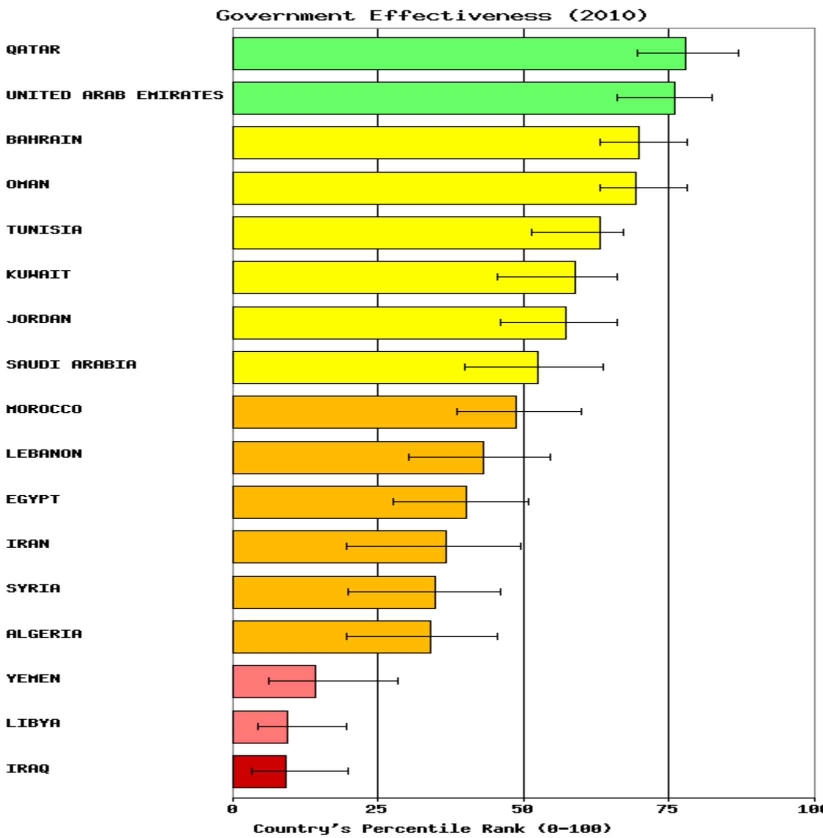
Over-dependence on non-competitive state industries, government jobs for employment, mixed with corruption and barriers to private sector growth and job creation

The Question of Governance

- Few cited their own governments before the present crisis.
- Governance only one of many concerns, but lack of warning of sudden wave of unrest reflects government's failure to listen and respond far more than a lack of warning indicators.
- Corruption a key concern, as is question of "dignity," "justice" in moral as well as legal sense, belief governments have failed to pursue Islamic values.
- Limited surveys show fear of physical security varies far more sharply than broad concerns with governance and economy.
- Limited sampling of countries sharply distorts results.

Government Effectiveness
(by world percentile)

Figure 85



Source: Kaufmann D., A. Kraay, and M. Mastruzzi (2010), The Worldwide Governance Indicators: Methodology and Analytical Issues
Note: The governance indicators presented here aggregate the views on the quality of governance provided by a large number of enterprise, citizen and expert survey respondents in industrial and developing countries. These data are gathered from a number of survey institutes, think tanks, non-governmental organizations, and international organizations. The WGI do not reflect the official views of the World Bank, its Executive Directors, or the countries they represent. The WGI are not used by the World Bank Group to allocate resources.

Figure 86

Country	Sources	Year	Percentile Rank (0-100)	Governance Score (-2.5 to +2.5)	Standard Error
ALGERIA	9	2010	34	-0.56	0.19
BAHRAIN	7	2010	69.9	0.59	0.22
EGYPT	10	2010	40.2	-0.43	0.18
IRAN	7	2010	36.8	-0.52	0.22
IRAQ	7	2010	9.1	-1.23	0.22
JORDAN	9	2010	57.4	0.08	0.19
KUWAIT	7	2010	58.9	0.1	0.22
LEBANON	9	2010	43.1	-0.34	0.19
LIBYA	7	2010	9.6	-1.21	0.2
MOROCCO	10	2010	48.8	-0.17	0.18
OMAN	6	2010	69.4	0.59	0.22
QATAR	8	2010	78	0.94	0.21
SAUDI ARABIA	7	2010	52.6	-0.08	0.22
SYRIA	9	2010	34.9	-0.55	0.19
TUNISIA	10	2010	63.2	0.19	0.18
UNITED ARAB EMIRATES	7	2010	76.1	0.78	0.22
YEMEN	8	2010	14.4	-1.03	0.21

Government Effectiveness "captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government's commitment to such policies." A higher ranking indicates greater government effectiveness.

Source: World Bank, World Governance Indicators
http://info.worldbank.org/governance/wgi/mc_chart.asp

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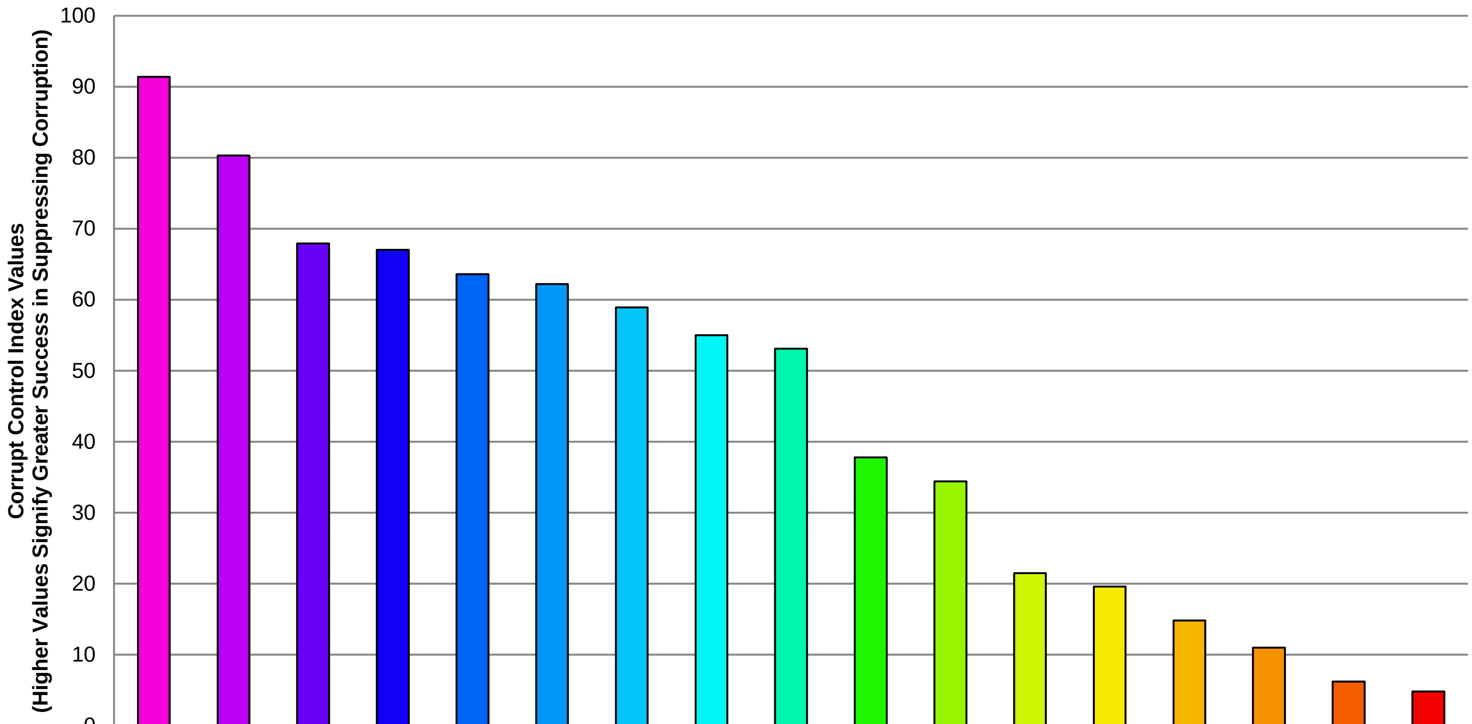
Control of Corruption (by world percentile)
Higher figures indicate greater control

2010 Corruption Control Metric

Figure 87



	Qatar	UAE	Oman	Kuwait	Bahrain	Saudi Arabia	Jordan	Tunisia	Morocco	Algeria	Egypt	Lebanon	Iran	Syria	Yemen	Libya	Iraq
2010 Corruption Control Country Values	91.4	80.3	67.9	67	63.6	62.2	58.9	55	53.1	37.8	34.4	21.5	19.6	14.8	11	6.2	4.8

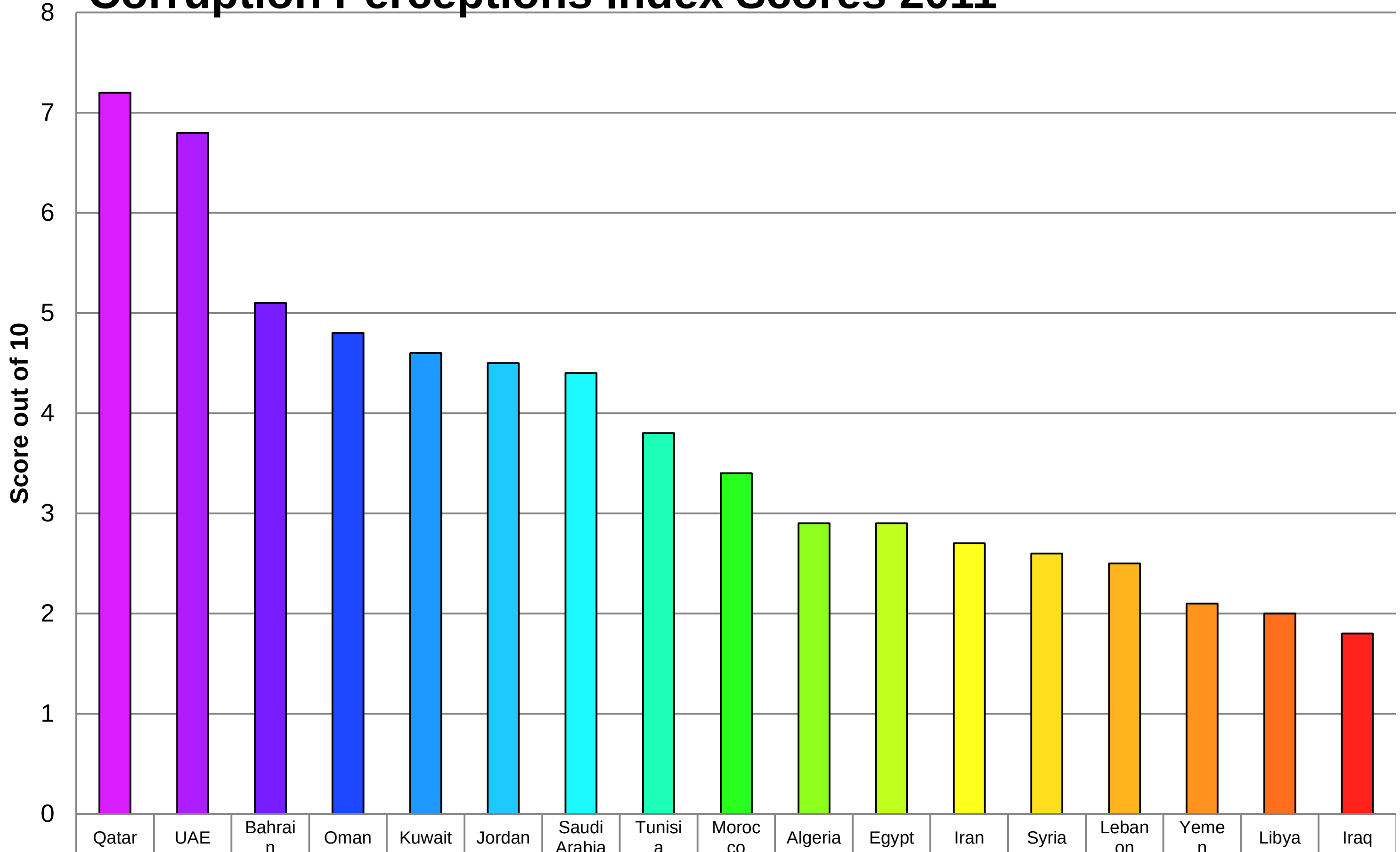
Control of Corruption "captures perceptions of the extent to which public power is exercised for private gain, including both petty and grand forms of corruption, as well as "capture" of the state by elites and private interests.

Source: World Bank Governance Indicators, Accessed January, 2012.
http://info.worldbank.org/governance/wgi/index.asp

Corruption Perception Index

Figure 88

Corruption Perceptions Index Scores 2011



	Qatar	UAE	Bahrain	Oman	Kuwait	Jordan	Saudi Arabia	Tunisia	Morocco	Algeria	Egypt	Iran	Syria	Lebanon	Yemen	Libya	Iraq
Corruption Perceptions Index Scores 2011	7.2	6.8	5.1	4.8	4.6	4.5	4.4	3.8	3.4	2.9	2.9	2.7	2.6	2.5	2.1	2	1.8

The Corruption Perceptions Index "ranks countries according to their perceived levels of public-sector corruption. The 2011 index draws on different assessments and business opinion surveys carried out by independent and reputable institutions. The surveys and assessments used to compile the index include questions relating to the bribery of public officials, kickbacks in public procurement, embezzlement of public funds, and questions that probe the strength and effectiveness of public-sector anti-corruption efforts."

Transparency International, Corruption Perceptions Index 2011, p. 4
http://www.transparency.org/publications/publications/other/corruption_perceptions_index_2011

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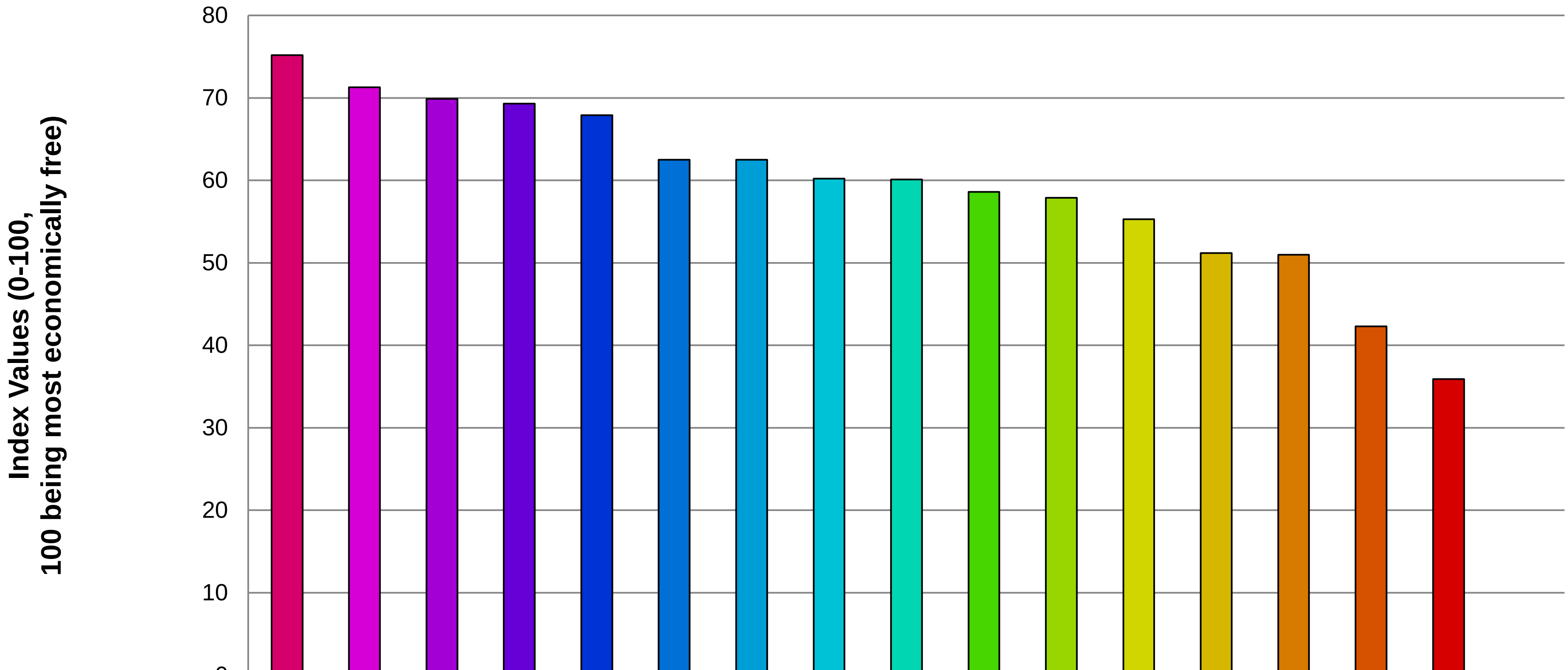
Economic Freedom Index

Figure 89

Aggregate Economic Freedom Index



	Bahrain	Qatar	Jordan	UAE	Oman	Kuwait	Saudi Arabia	Morocco	Lebanon	Tunisia	Egypt	Yemen	Syria	Algiera	Iran	Libya	Iraq
Total Economic Freedom	75.2	71.3	69.9	69.3	67.9	62.5	62.5	60.2	60.1	58.6	57.9	55.3	51.2	51	42.3	35.9	

The Economic Freedom Index measure ten components of economic freedom, assigning a grade in each using a scale from 0 to 100, where 100 represents the maximum freedom. The 10 economic freedoms are grouped into four broad categories or pillars of economic freedom: Rule of Law (property rights, freedom from corruption); Limited Government (fiscal freedom, government spending); Regulatory Efficiency (business freedom, labor freedom, monetary freedom); and Open Markets (trade freedom, investment freedom, financial freedom). Each of the freedoms within these four broad categories is individually scored on a scale of 0 to 100. A country's overall economic freedom score is a simple average of its scores on the 10 individual freedoms.

The Heritage Foundation and *The Economist*, Economic Freedom Index 2012, Accessed 2/8/2012.
http://www.heritage.org/index/ranking

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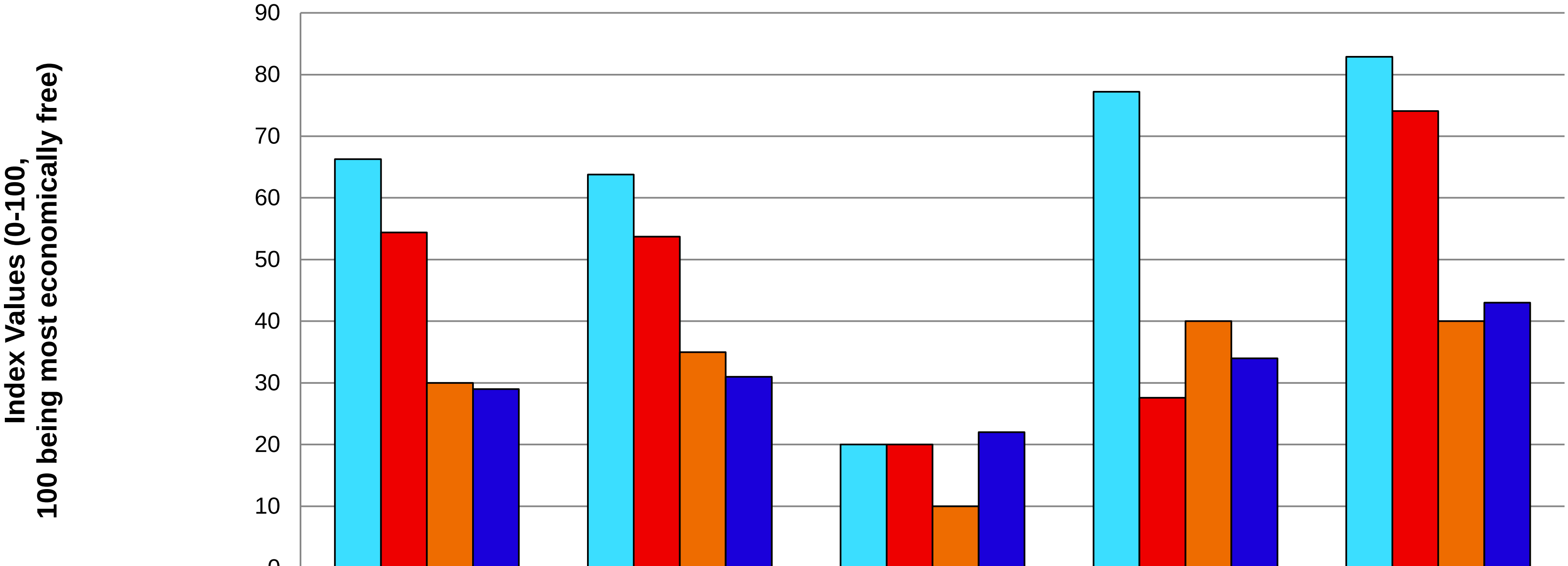
Economic Freedom Index

Figure 90

North Africa – Selected Indicators of Economic Freedom



	Algiera	Egypt	Libya	Morocco	Tunisia
Business Freedom	66.3	63.8	20	77.2	82.9
Labor Freedom	54.4	53.7	20	27.6	74.1
Proprty Rights	30	35	10	40	40
Freedom from Corruption	29	31	22	34	43

Property Rights - measures the degree to which a state protects private property, enforces protections, and refrains from expropriation.
Freedom From Corruption - derived primarily from Transparency International's Corruption Perceptions Index (CPI) for 2010.
Business Freedom - a quantitative measure of the ability to start, operate, and close a business that represents the overall burden of regulation as well as the efficiency of government in the regulatory process.
Labor Freedom - provides cross-country data on regulations concerning minimum wages; laws inhibiting layoffs; severance requirements; and measurable regulatory burdens on hiring, hours, and so on.

The Heritage Foundation and *The Economist*, Economic Freedom Index 2012, Accessed 2/8/2012.
http://www.heritage.org/index/ranking

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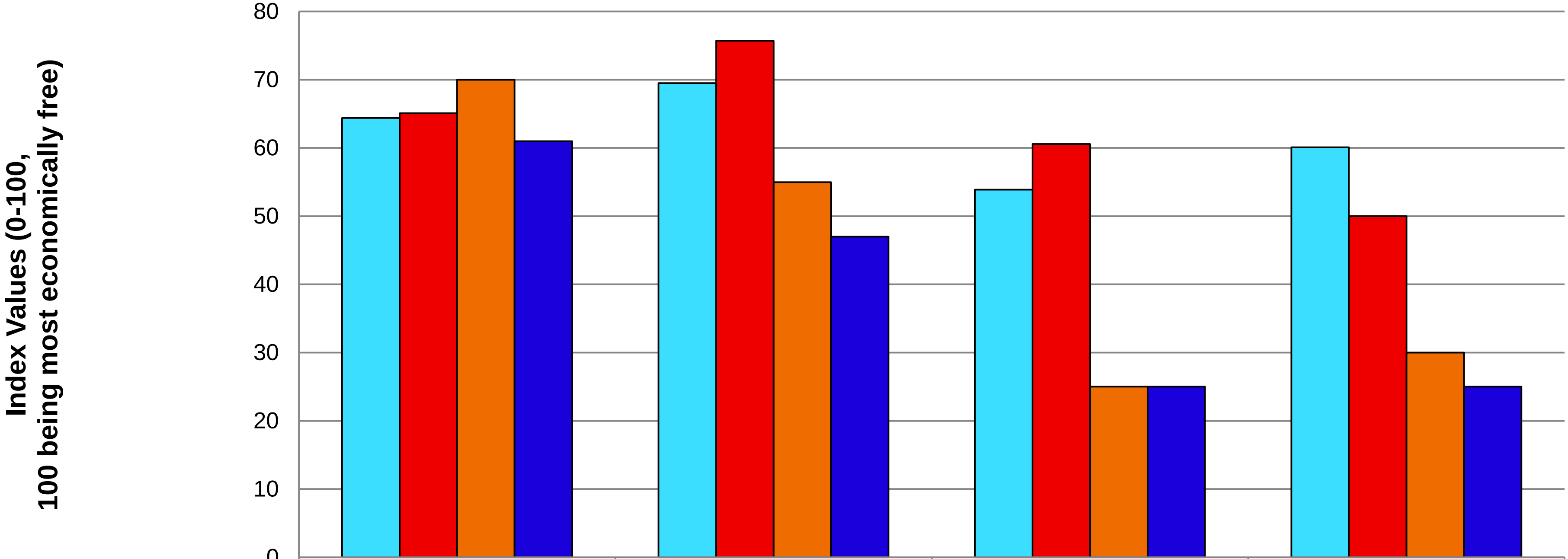
Economic Freedom Index

Figure 91

Levant – Selected Indicators of Economic Freedom



	Israel	Jordan	Lebanon	Syria
Business Freedom	64.4	69.5	53.9	60.1
Labor Freedom	65.1	75.7	60.6	50
Proprty Rights	70	55	25	30
Freedom from Corruption	61	47	25	25

Property Rights - measures the degree to which a state protects private property, enforces protections, and refrains from expropriation.

Freedom From Corruption - derived primarily from Transparency International's Corruption Perceptions Index (CPI) for 2010.

Business Freedom - a quantitative measure of the ability to start, operate, and close a business that represents the overall burden of regulation as well as the efficiency of government in the regulatory process.

Labor Freedom - provides cross-country data on regulations concerning minimum wages; laws inhibiting layoffs; severance requirements; and measurable regulatory burdens on hiring, hours, and so on.

The Heritage Foundation and *The Economist*, Economic Freedom Index 2012, Accessed 2/8/2012.
http://www.heritage.org/index/ranking

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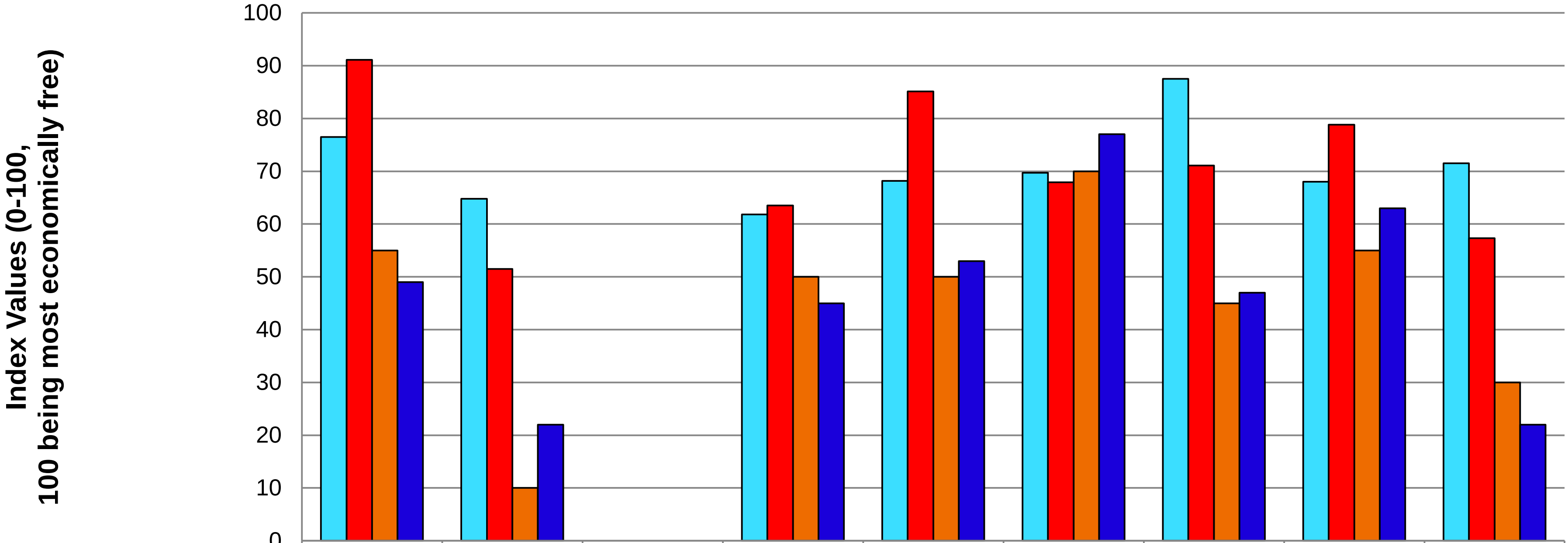
Economic Freedom Index

Figure 92

Persian Gulf– Selected Indicators of Economic Freedom



	Bahrain	Iran	Iraq	Kuwait	Oman	Qatar	Saudi Arabia	UAE	Yemen
Business Freedom	76.5	64.8		61.8	68.2	69.7	87.5	68	71.5
Labor Freedom	91.1	51.5		63.5	85.1	67.9	71.1	78.8	57.3
Proprty Rights	55	10		50	50	70	45	55	30
Freedom from Corruption	49	22		45	53	77	47	63	22

Property Rights - measures the degree to which a state protects private property, enforces protections, and refrains from expropriation.
Freedom From Corruption - derived primarily from Transparency International's Corruption Perceptions Index (CPI) for 2010.
Business Freedom - a quantitative measure of the ability to start, operate, and close a business that represents the overall burden of regulation as well as the efficiency of government in the regulatory process.
Labor Freedom - provides cross-country data on regulations concerning minimum wages; laws inhibiting layoffs; severance requirements; and measurable regulatory burdens on hiring, hours, and so on.

The Heritage Foundation and *The Economist*, Economic Freedom Index 2012, Accessed 2/8/2012.
http://www.heritage.org/index/ranking

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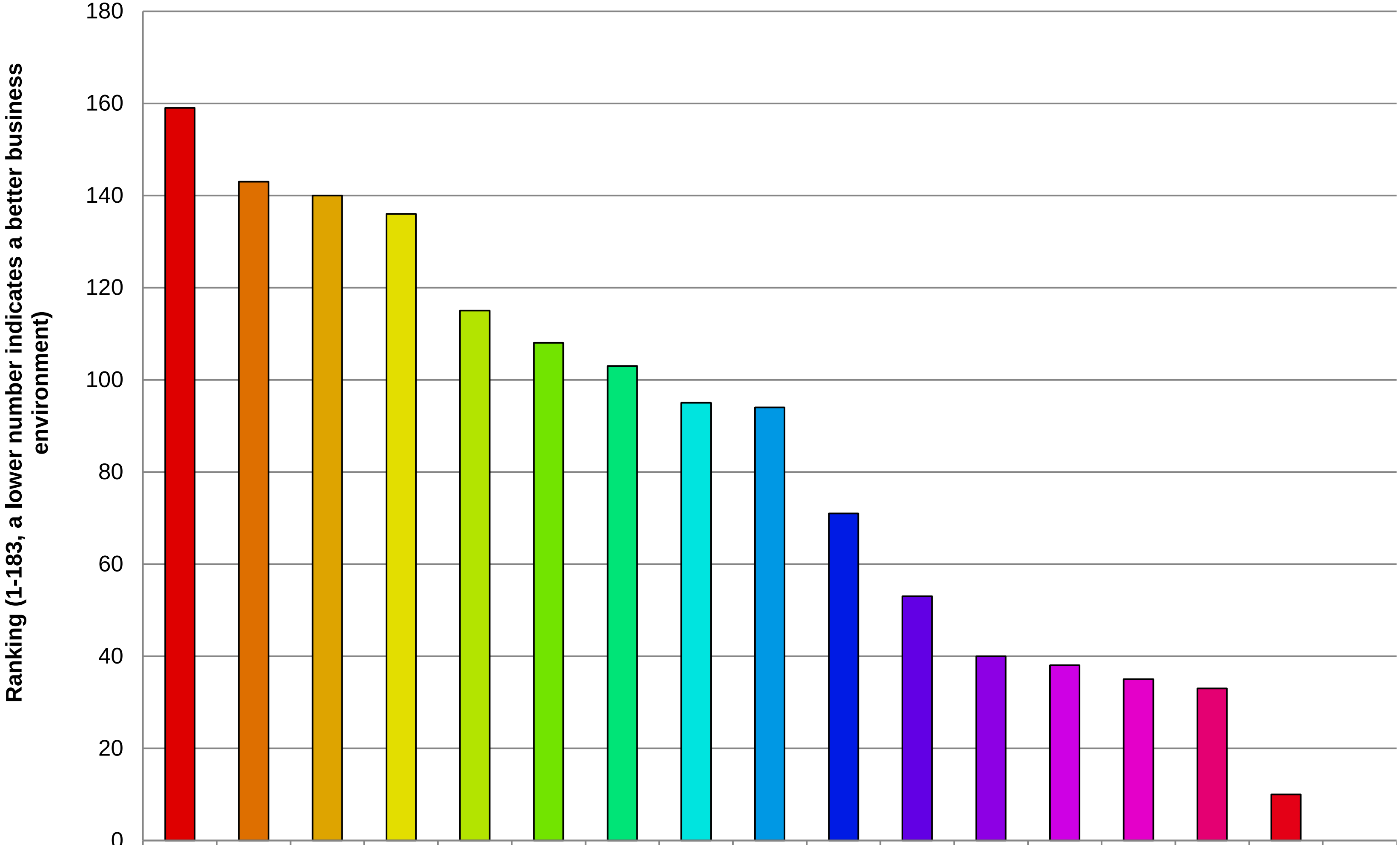
Ease of Doing Business Index

Figure 93



	Iraq	Algeria	Iran	Syria	Morocco	Egypt	Lebanon	Jordan	Yemen	Kuwait	Oman	Tunisia	Qatar	UAE	Bahrain	Saudi Arabia	Libya
Ease of Doing Business Index 2010	159	143	140	136	115	108	103	95	94	71	53	40	38	35	33	10	

The Ease of Doing Business Index "ranks economies from 1 to 183. For each economy the ranking is calculated as the simple average of the percentile rankings on each of the 10 topics included in the index in *Doing Business 2012*: starting a business, dealing with construction permits, registering property, getting credit, protecting investors, paying taxes, trading across borders, enforcing contracts, resolving insolvency and, new this year, getting electricity."

The World Bank, dataBank, World Development Indicators, Accessed February 1, 2012.
http://data.worldbank.org/indicator/IC.BUS.EASE.XQ

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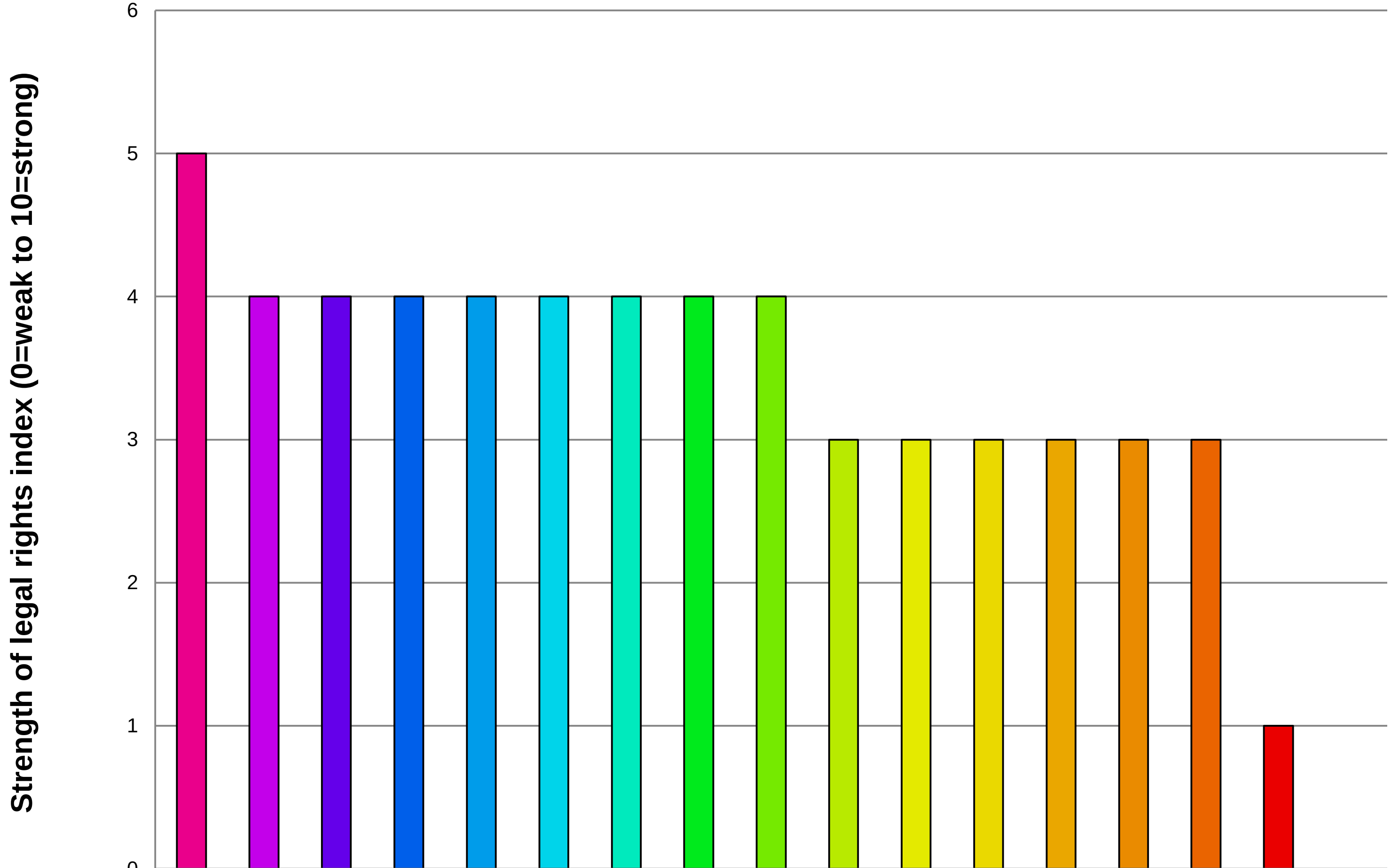
Strength of Legal Rights Index

Figure 94



	Saudi Arabia	Bahrain	Iran, Islamic Rep.	Jordan	Kuwait	Lebanon	Oman	Qatar	United Arab Emirates	Algeria	Egypt, Arab Rep.	Iraq	Morocco	Tunisia	Yemen, Rep.	Syrian Arab Republic	Libya
Strength of Legal Rights Index Scores for MENA States	5	4	4	4	4	4	4	4	4	3	3	3	3	3	3	1	

Strength of Legal Rights Index "measures the degree to which collateral and bankruptcy laws protect the rights of borrowers and lenders and thus facilitate lending. The index ranges from 0 to 10, with higher scores indicating that these laws are better designed to expand access to credit."

The World Bank, dataBank, Accessed 1/25/2012.
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

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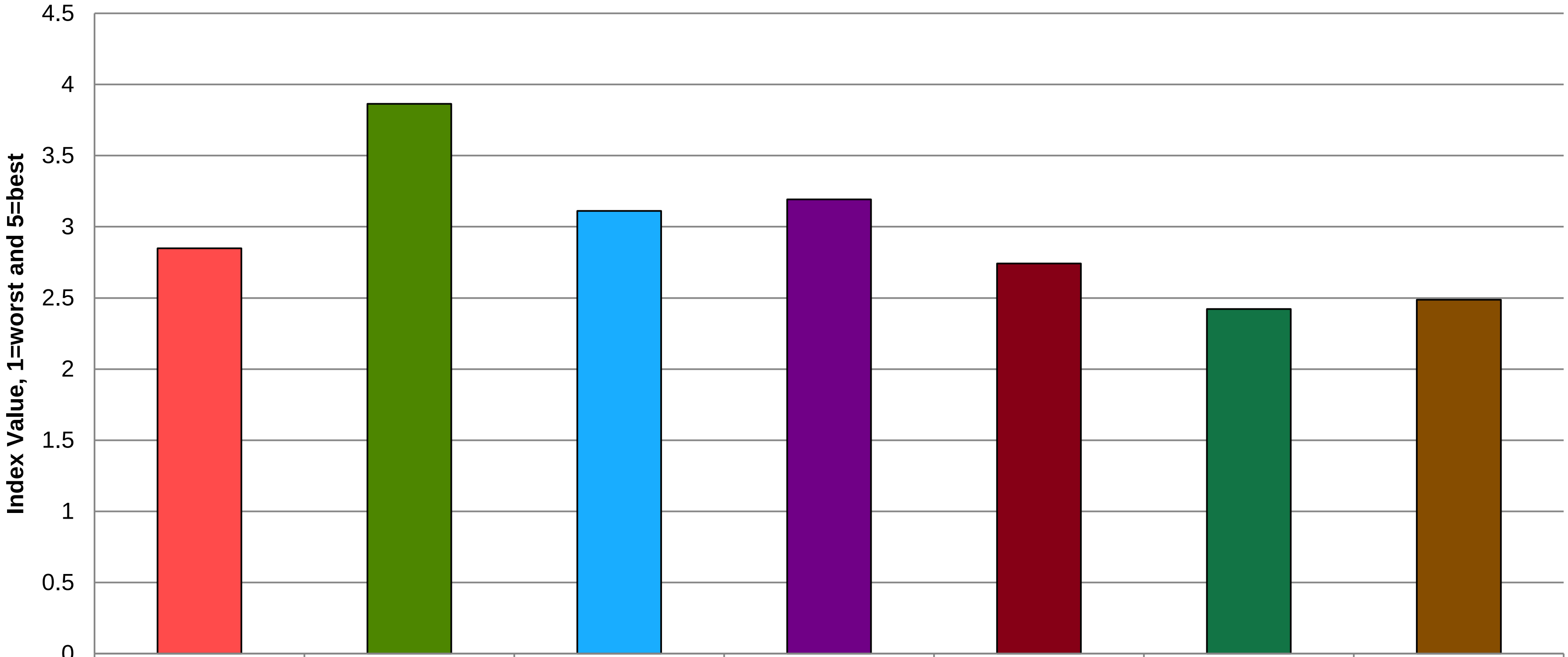
Obstacles to Business: Logistical Performance

Figure 95

Cross-Regional Comparison of Logistical Effectiveness



	Middle East & North Africa (all income levels)	North America	East Asia & Pacific (all income levels)	Europe & Central Asia (all income levels)	Latin America & Caribbean (all income levels)	Sub-Saharan Africa (all income levels)	South Asia
2009	2.848947368	3.865	3.1115	3.191914894	2.741304348	2.421944444	2.4875

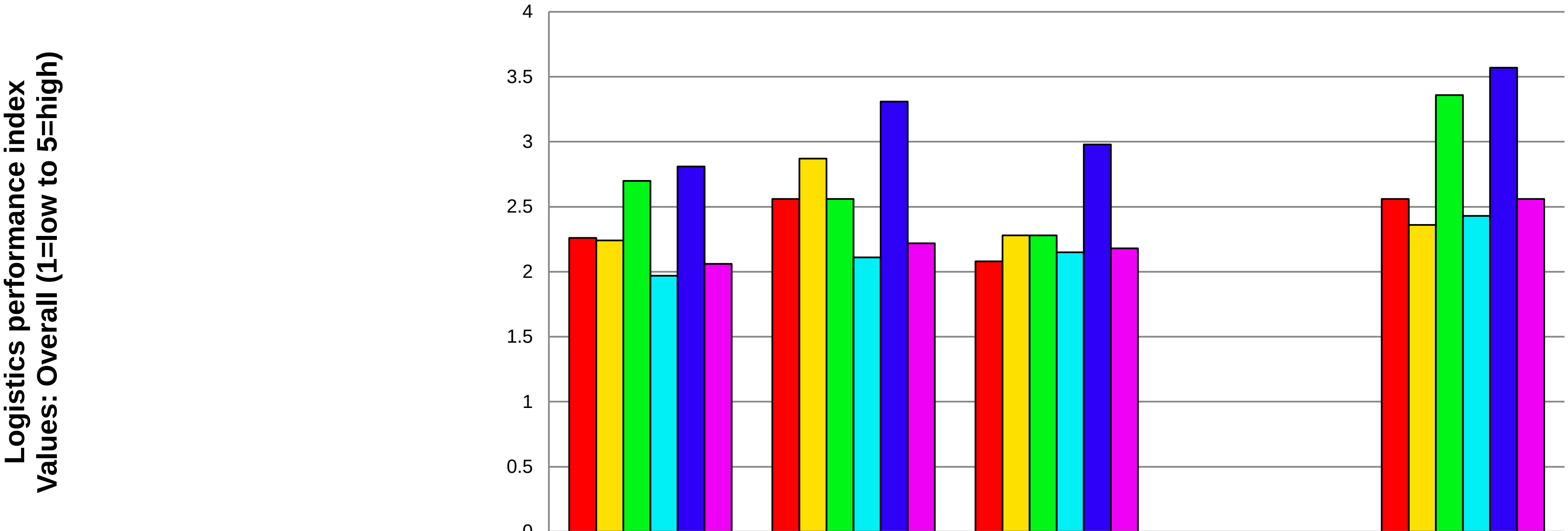
Logistics Performance Index "overall score reflects perceptions of a country's logistics based on efficiency of customs clearance process, quality of trade- and transport-related infrastructure, ease of arranging competitively priced shipments, quality of logistics services, ability to track and trace consignments, and frequency with which shipments reach the consignee within the scheduled time. The index ranges from 1 to 5, with a higher score representing better performance."

The World Bank, dataBank, World Development Indicators, Accessed February 1, 2012.
http://data.worldbank.org/indicator/IC.BUS.EASE.XQ

Obstacles to Business: Logistical Performance

Figure 96

North Africa - Logistics Effectiveness Index Indicators



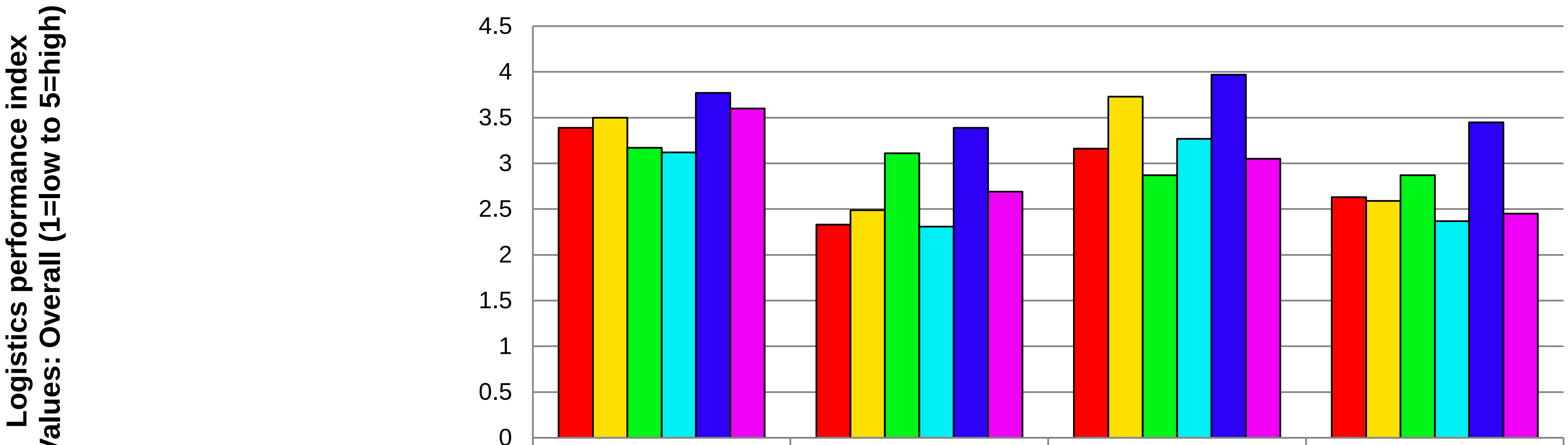
	Algeria	Egypt, Arab Rep.	Libya	Morocco	Tunisia
Logistics performance index: Ability to track and trace consignments (1=low to 5=high)	2.26	2.56	2.08		2.56
Logistics performance index: Competence and quality of logistics services (1=low to 5=high)	2.24	2.87	2.28		2.36
Logistics performance index: Ease of arranging competitively priced shipments (1=low to 5=high)	2.7	2.56	2.28		3.36
Logistics performance index: Efficiency of customs clearance process (1=low to 5=high)	1.97	2.11	2.15		2.43
Logistics performance index: Frequency with which shipments reach consignee within scheduled or expected time (1=low to 5=high)	2.81	3.31	2.98		3.57
Logistics performance index: Quality of trade and transport-related infrastructure (1=low to 5=high)	2.06	2.22	2.18		2.56

The World Bank, dataBank, World Development Indicators, Accessed February 1, 2012.
http://data.worldbank.org/indicator/IC.BUS.EASE.XQ

Obstacles to Business: Logistical Performance

Figure 97

Levant - Logistics Effectiveness Index Indicators



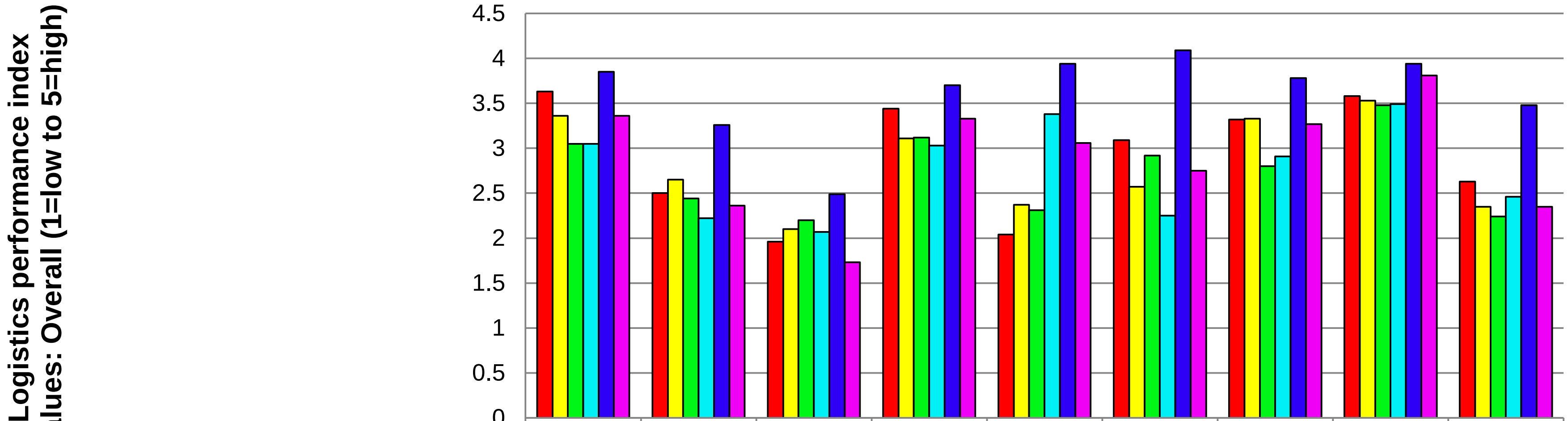
	Israel	Jordan	Lebanon	Syrian Arab Republic
Logistics performance index: Ability to track and trace consignments (1=low to 5=high)	3.39	2.33	3.16	2.63
Logistics performance index: Competence and quality of logistics services (1=low to 5=high)	3.5	2.49	3.73	2.59
Logistics performance index: Ease of arranging competitively priced shipments (1=low to 5=high)	3.17	3.11	2.87	2.87
Logistics performance index: Efficiency of customs clearance process (1=low to 5=high)	3.12	2.31	3.27	2.37
Logistics performance index: Frequency with which shipments reach consignee within scheduled or expected time (1=low to 5=high)	3.77	3.39	3.97	3.45
Logistics performance index: Quality of trade and transport-related infrastructure (1=low to 5=high)	3.6	2.69	3.05	2.45

The World Bank, dataBank, World Development Indicators, Accessed February 1, 2012.
http://data.worldbank.org/indicator/IC.BUS.EASE.XQ

Obstacles to Business: Logistical Performance

Figure 98

Gulf - Logistics Effectiveness Index Indicators



	Bahrain	Iran, Islamic Rep.	Iraq	Kuwait	Oman	Qatar	Saudi Arabia	United Arab Emirates	Yemen, Rep.
Logistics performance index: Ability to track and trace consignments (1=low to 5=high)	3.63	2.5	1.96	3.44	2.04	3.09	3.32	3.58	2.63
Logistics performance index: Competence and quality of logistics services (1=low to 5=high)	3.36	2.65	2.1	3.11	2.37	2.57	3.33	3.53	2.35
Logistics performance index: Ease of arranging competitively priced shipments (1=low to 5=high)	3.05	2.44	2.2	3.12	2.31	2.92	2.8	3.48	2.24
Logistics performance index: Efficiency of customs clearance process (1=low to 5=high)	3.05	2.22	2.07	3.03	3.38	2.25	2.91	3.49	2.46
Logistics performance index: Frequency with which shipments reach consignee within scheduled or expected time (1=low to 5=high)	3.85	3.26	2.49	3.7	3.94	4.09	3.78	3.94	3.48
Logistics performance index: Quality of trade and transport-related infrastructure (1=low to 5=high)	3.36	2.36	1.73	3.33	3.06	2.75	3.27	3.81	2.35

The World Bank, dataBank, World Development Indicators, Accessed February 1, 2012.
http://data.worldbank.org/indicator/IC.BUS.EASE.XQ

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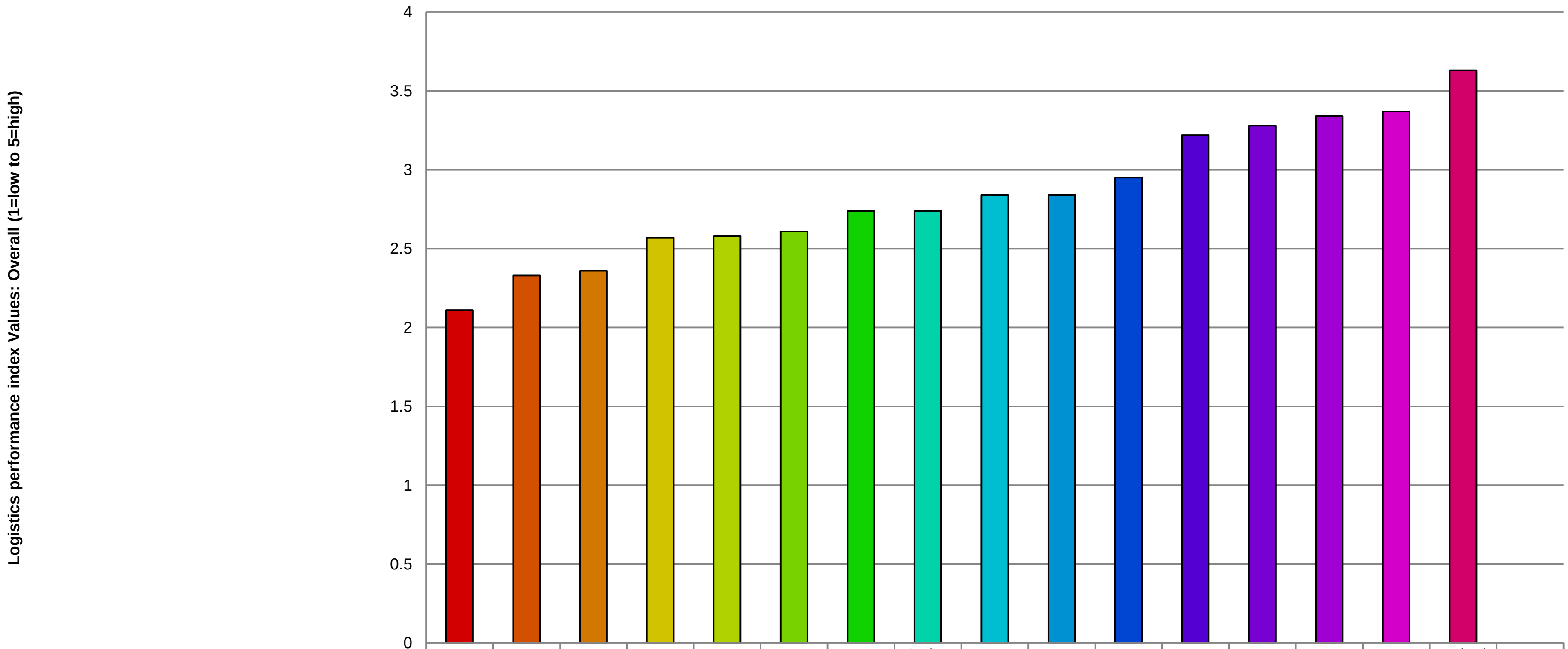
Obstacles to Business: Logistical Performance

Figure 99

Logistics Performance Index



	Iraq	Libya	Algeria	Iran, Islamic Rep.	Yemen, Rep.	Egypt, Arab Rep.	Jordan	Syrian Arab Republic	Oman	Tunisia	Qatar	Saudi Arabia	Kuwait	Lebanon	Bahrain	United Arab Emirates	Morocco
Logistics performance index: Overall (1=low to 5=high)	2.11	2.33	2.36	2.57	2.58	2.61	2.74	2.74	2.84	2.84	2.95	3.22	3.28	3.34	3.37	3.63	

Logistics Performance Index "overall score reflects perceptions of a country's logistics based on efficiency of customs clearance process, quality of trade- and transport-related infrastructure, ease of arranging competitively priced shipments, quality of logistics services, ability to track and trace consignments, and frequency with which shipments reach the consignee within the scheduled time. The index ranges from 1 to 5, with a higher score representing better performance."

The World Bank, dataBank, World Development Indicators, Accessed February 1, 2012. http://data.worldbank.org/indicator/IC.BUS.EASE.XQ

Problems in Governance – II
Uncertain Provision of Key Services

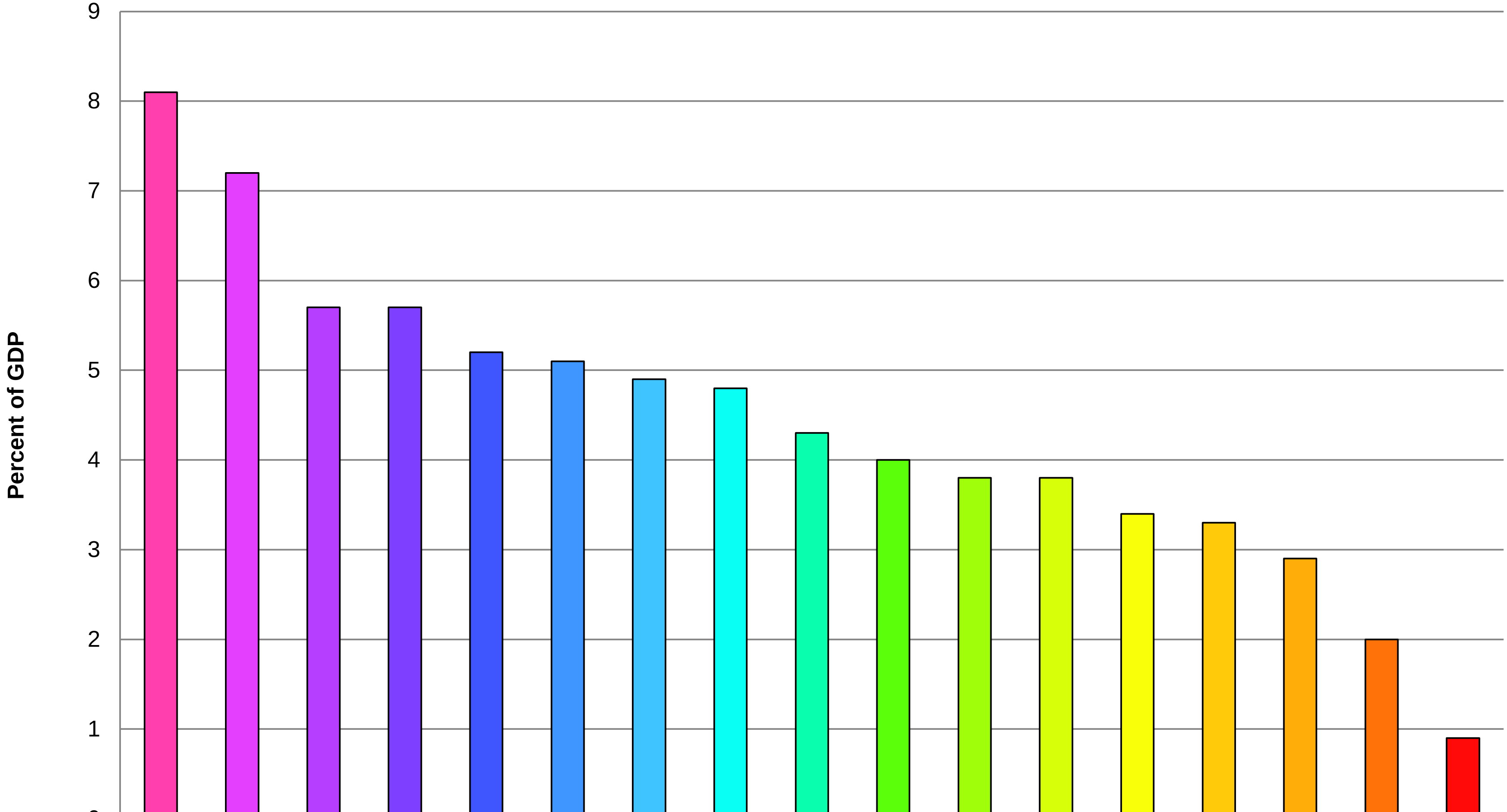
Problems in funding education, health, water, refuse removal, housing, and mixed use of subsidies and barriers.

Uncertain Governance: Education, Health, Utilities, Housing, Infrastructure, etc.

- State sector lacks efficiency, integrity.
- Government services do not keep up with either rising population or expectations.
  - Key infrastructure failings, particularly in urban periphery and slums and rural areas.
- Oil wealth is relative and often poorly allocated.
- Broad perception that governments are corrupt, unjust, and driven by selfish elites.
- Gap between intentions and execution.
- Perceived favoritism by crony, ethnicity, sect, tribe, faction, and area.

Figure 100

Education Expenditure (% of GDP)



	Jordan	Tunisia	KSA	Morocco	Yemen	Iraq	Syria	Iran	Algeria	Oman	Egypt	Kuwait	Libya	Qatar	Bahrain	Lebanon	UAE
Series1	8.1	7.2	5.7	5.7	5.2	5.1	4.9	4.8	4.3	4	3.8	3.8	3.4	3.3	2.9	2	0.9

Source: UNDP Human Development Report 2010

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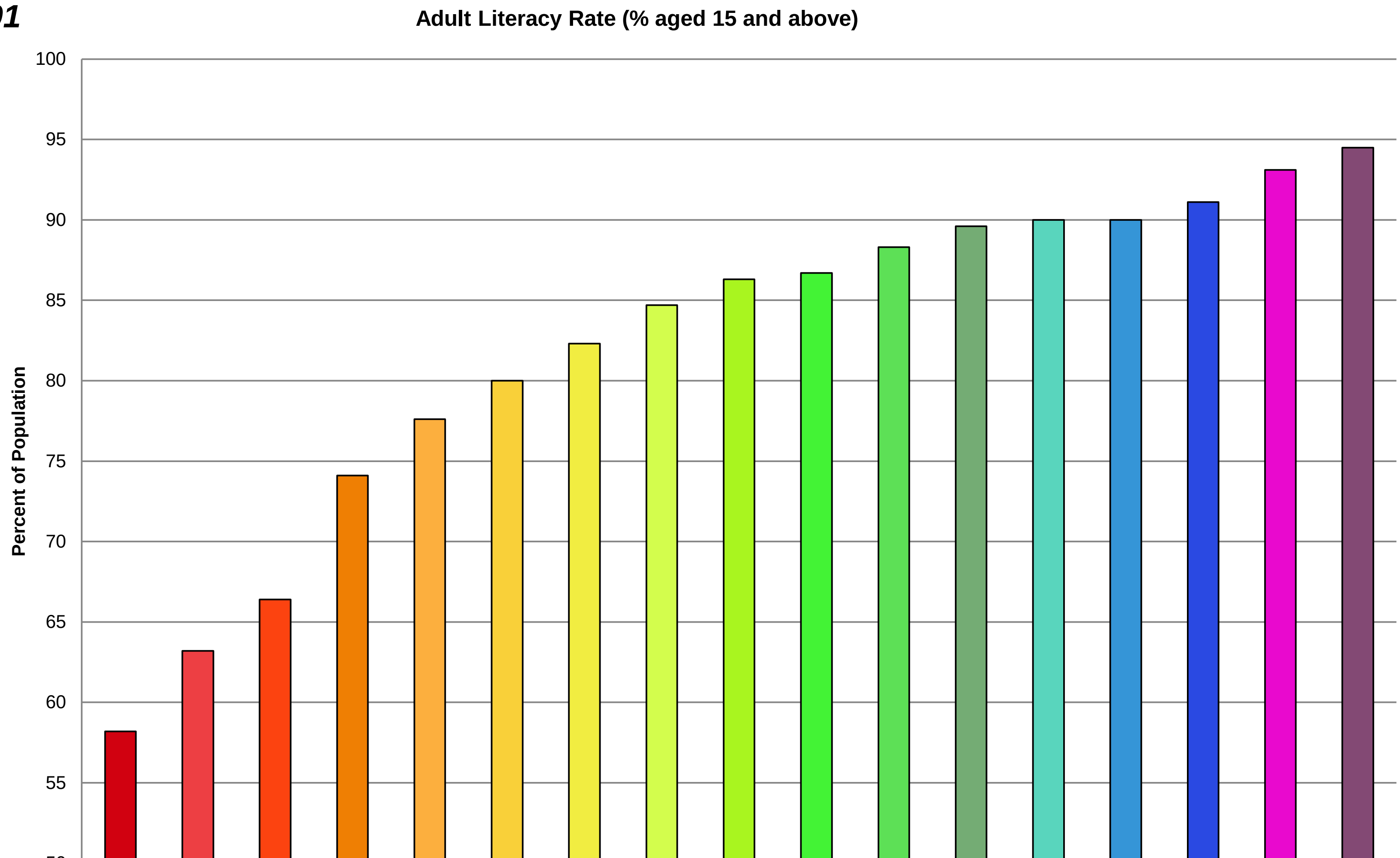
Education Levels

Figure 101



	Morocco	Yemen	Egypt	Iraq	Algeria	Tunisia	Iran	Syria	Oman	KSA	Libya	Lebanon	Bahrain	UAE	Jordan	Qatar	Kuwait
Adult Literacy Rate	58.2	63.2	66.4	74.1	77.6	80	82.3	84.7	86.3	86.7	88.3	89.6	90	90	91.1	93.1	94.5

Source: UNDP, Human Development Indicators, 2010.

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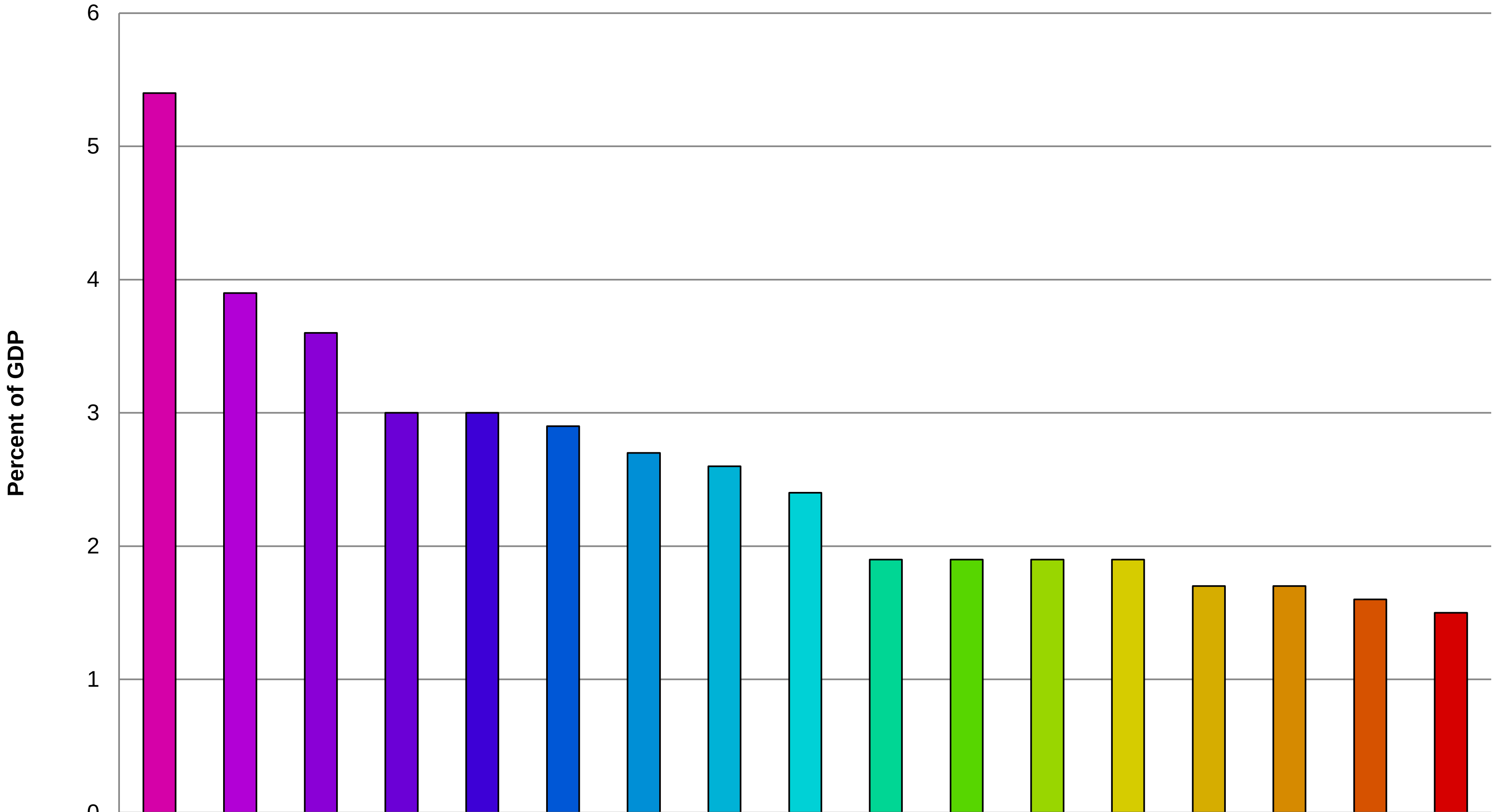
Total Health Expenditures (% of GDP)

Figure 102



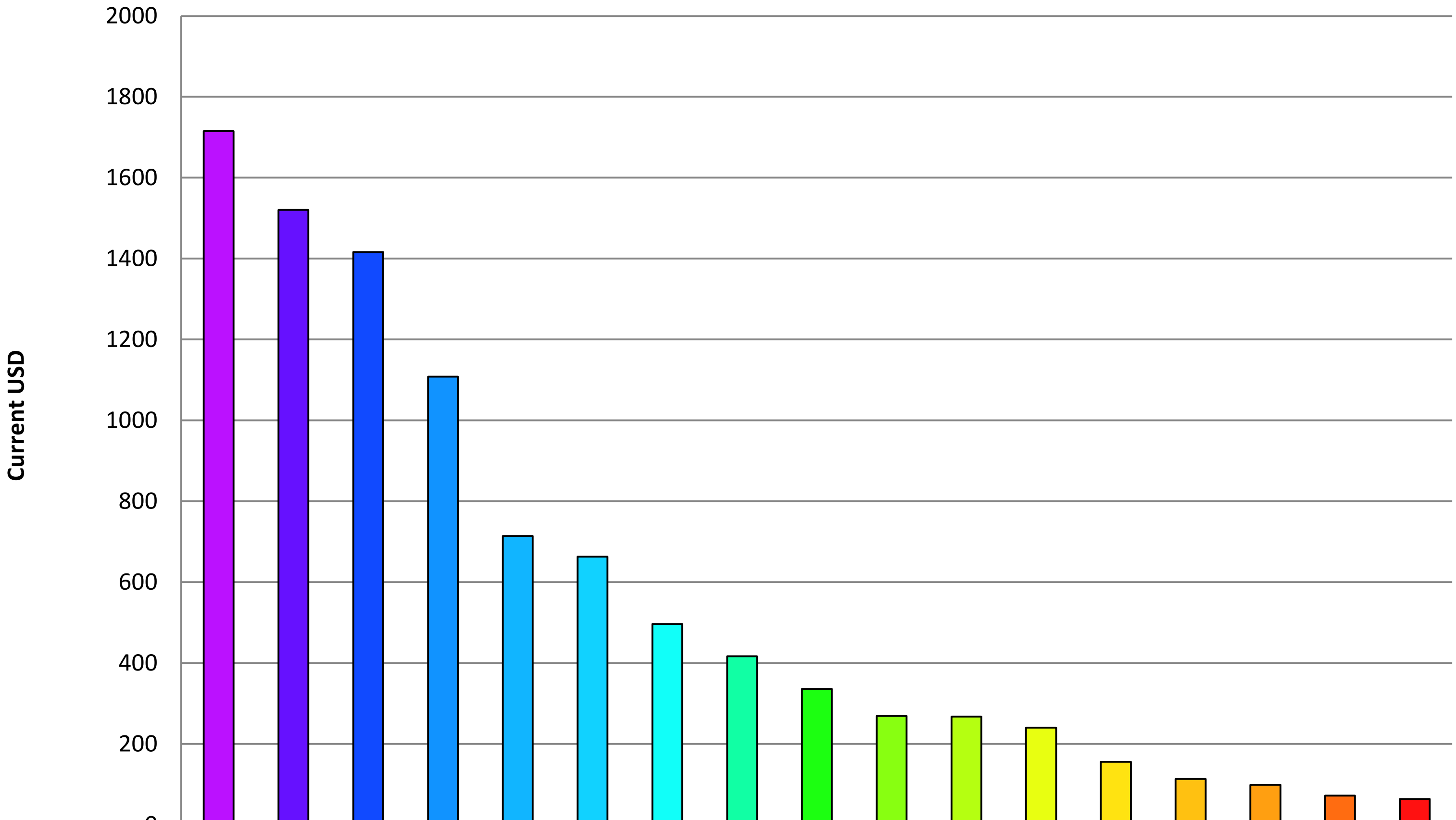
	Jordan	Lebanon	Algeria	Iran	Tunisia	Qatar	KSA	Bahrain	Egypt	Iraq	Libya	Oman	UAE	Kuwait	Morocco	Syria	Yemen
Series1	5.4	3.9	3.6	3	3	2.9	2.7	2.6	2.4	1.9	1.9	1.9	1.9	1.7	1.7	1.6	1.5

Source: UNDP Human Development Report 2010

Health Expenditure Per Capita in the MENA Region

(in Current USD)

Figure 103



	Qatar	United Arab Emirates	Kuwait	Bahrain	Saudi Arabia	Lebanon	Oman	Libya	Jordan	Iran, Islamic Rep.	Algeria	Tunisia	Morocco	Egypt, Arab Rep.	Iraq	Syrian Arab Republic	Yemen, Rep.
Health expenditure per capita (current US$)	1715	1520	1416	1108	714	663	497	417	336	269	268	240	156	113	98	72	64

World Bank, World dataBank, Accessed 1/30/2012
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

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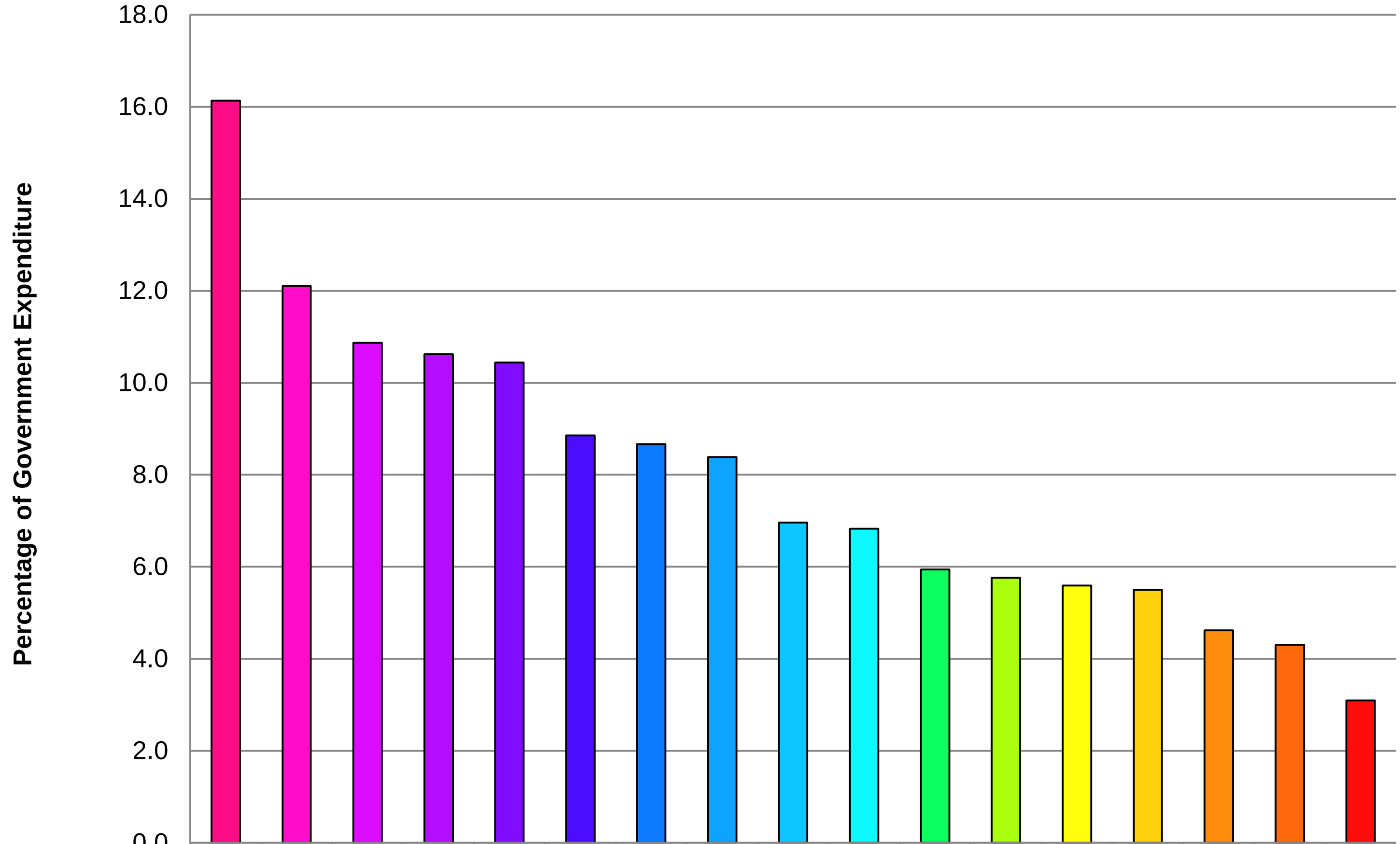
Health Expenditure, Public (% of Government Expenditure)

Figure 104



	Jordan	Lebanon	Bahrain	Algeria	Tunisia	United Arab Emirates	Iran, Islamic Rep.	Saudi Arabia	Morocco	Qatar	Egypt, Arab Rep.	Oman	Kuwait	Libya	Syrian Arab Republic	Yemen, Rep.	Iraq
Health expenditure, public (% of government expenditure)	16.1	12.1	10.9	10.6	10.4	8.9	8.7	8.4	7.0	6.8	5.9	5.8	5.6	5.5	4.6	4.3	3.1

World Bank, World dataBank, Accessed 1/30/2012
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

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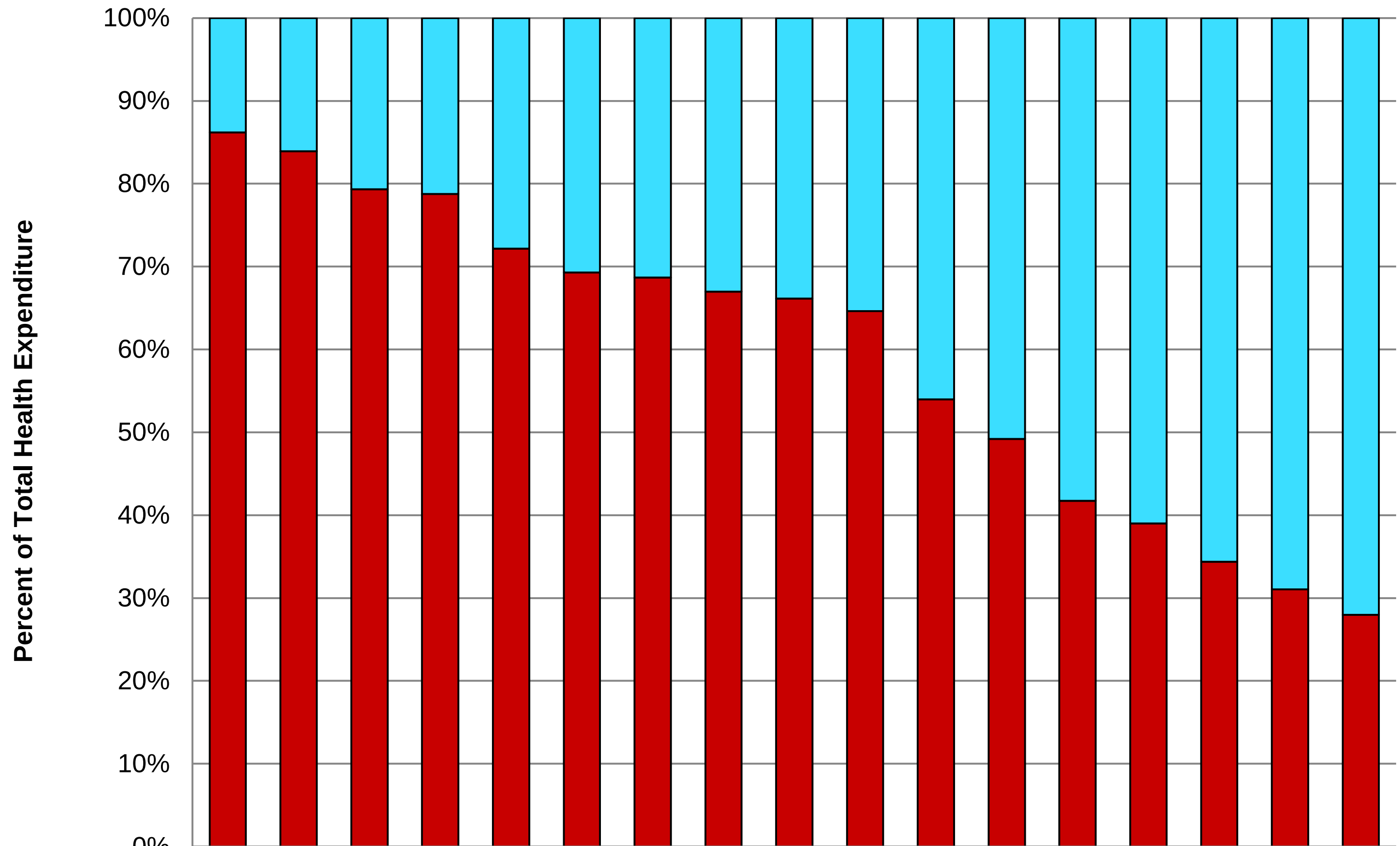
Figure 105

Proportion of Health Expenditure Paid by the Public and Private Sectors



	Algeria	Kuwait	Qatar	Oman	Iraq	United Arab Emirates	Bahrain	Saudi Arabia	Libya	Jordan	Tunisia	Lebanon	Egypt, Arab Rep.	Iran, Islamic Rep.	Morocco	Syrian Arab Republic	Yemen, Rep.
Health Expenditure, private (% of total health expenditure)	13.8	16.1	20.7	21.2	27.8	30.7	31.3	33.0	33.9	35.4	46.0	50.8	58.3	61.0	65.6	69.0	72.0
Health expenditure, public (% of total health expenditure)	86.2	83.9	79.3	78.8	72.2	69.3	68.7	67.0	66.1	64.6	54.0	49.2	41.7	39.0	34.4	31.0	28.0

World Bank, World dataBank, Accessed 1/30/2012
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

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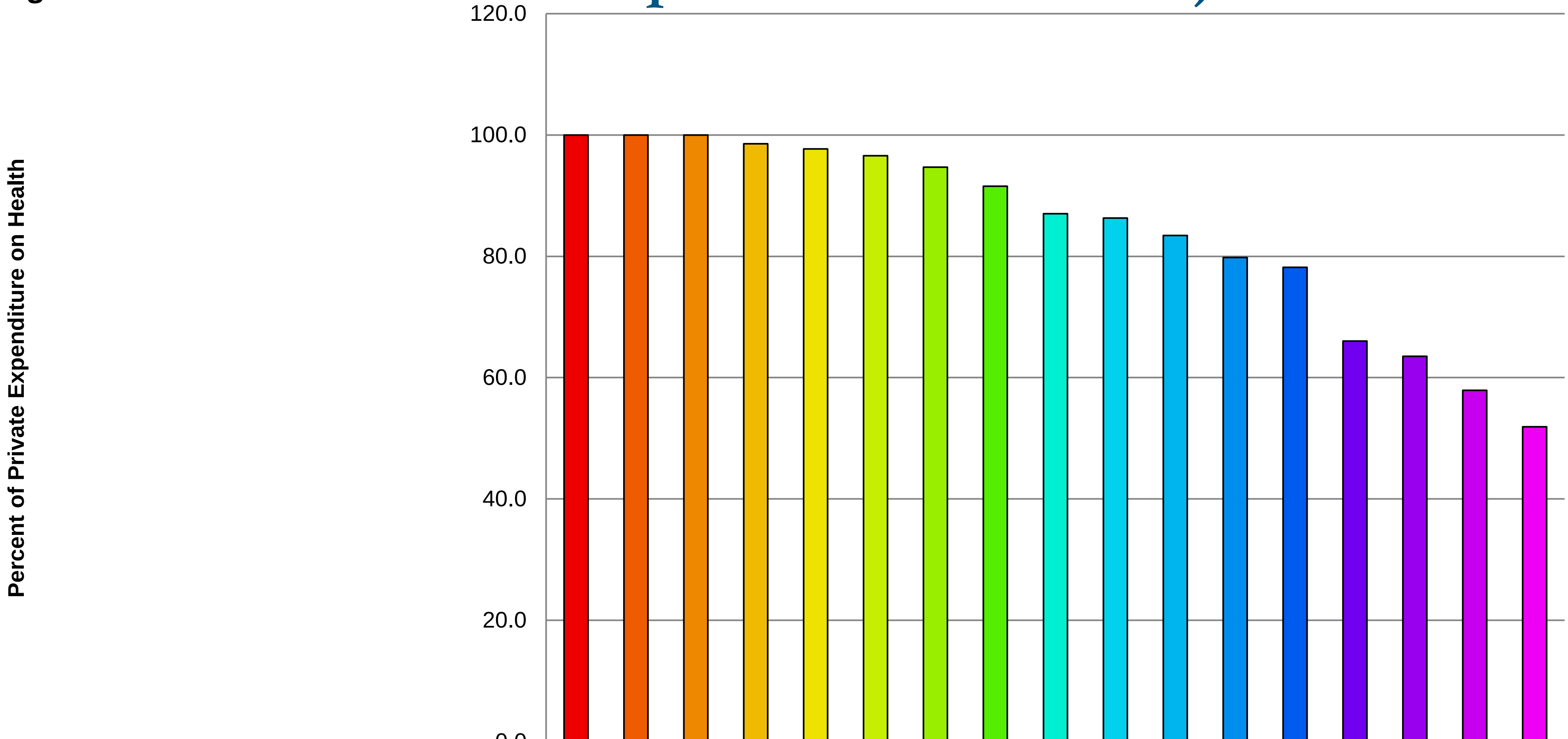
Out-of-pocket Health Expenditure (% of Private Expenditure on Health)

Figure 106



	Iraq	Libya	Syrian Arab Republic	Yemen, Rep.	Egypt, Arab Rep.	Iran, Islamic Rep.	Algeria	Kuwait	Tunisia	Morocco	Jordan	Lebanon	Qatar	United Arab Emirates	Oman	Bahrain	Saudi Arabia
Out-of-pocket health expenditure (% of private expenditure on health)	100.0	100.0	100.0	98.6	97.7	96.6	94.7	91.6	87.0	86.3	83.5	79.8	78.2	66.0	63.5	57.9	51.9

*Note: Out-of-pocket health expenditure is any direct outlay by households, including gratuities and in-kind payments, to health practitioners and suppliers of pharmaceuticals, therapeutic appliances, and other goods and services whose primary intent is to contribute to the restoration or enhancement of health status of individuals or population groups. It is part of private health expenditure.

World Development Bank, World dataBank, Accessed 1/27/2012
http://databank.worldbank.org/ddp/home.do?Step=3&id=4

Safe Drinking Water Adequacy

Figure 107

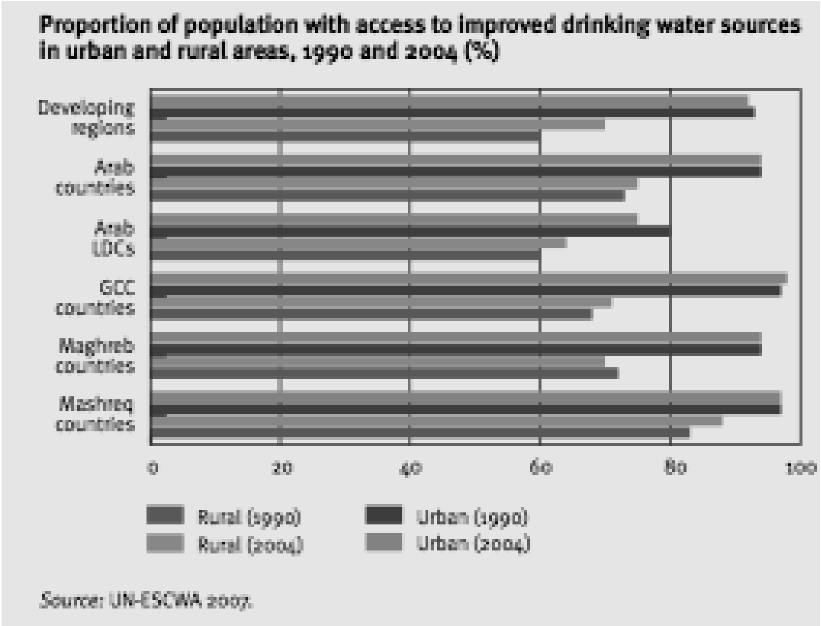
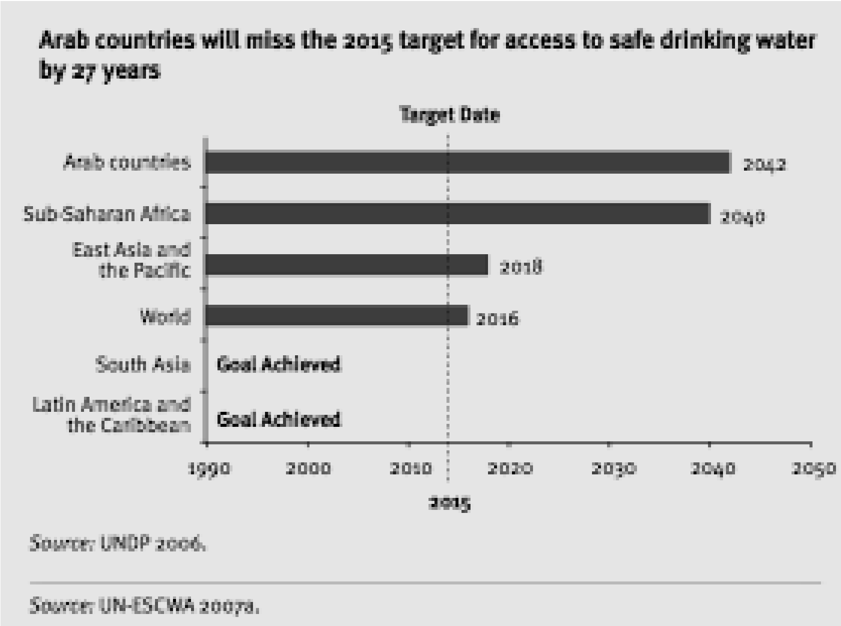


Figure 108



Arab countries are off track. The proportion of the population in the region using improved drinking water sources rose slightly between 1990 and 2004 from 83 per cent to 85 per cent. It increased from 65 to 68 per cent in Arab LDCs. However, this sub-regional average does not include Somalia where only 29 per cent of the population had access to safe water in 2004. In the other three sub-regions, it reached 86 per cent in the Maghreb, 94 per cent in the GCC countries, and 86 per cent in the Mashreq.

Source: Arab Development Report, 2009, p. 44.