

March 2021

KAS PolDiMed Survey 2020

Regional Program Political Dialogue South Mediterranean



International Relations in the MENA

What are the Perceptions in the Region?

Executive Summary

Since the Arab uprisings of 2011, many international actors have come to play a greater role across the Middle East and North Africa (MENA). As the U.S. has focused less on MENA, Russia has reemerged as a significant regional actor while China has sought to expand its influence through the Belt and Road Initiative (BRI) by signing cooperation agreements with many Arab governments. European governments remain engaged, with a particular emphasis on the region following the refugee crisis of 2015-6. Additionally, Turkey has expanded its engagement, including interventions in conflicts in Syria and Libya, while demonstrating continued support for Gaza. At the same time, the regional Saudi-UAE bloc has sought to counter influence from a range of countries including Turkey, Qatar, and Iran while pushing back against Islamist interests across MENA. Against this backdrop, the 2020 Survey of the Regional Program Political Dialogue South Mediterranean of the Konrad-Adenauer-Stiftung (KAS PolDiMed) seeks to understand how ordinary Arab citizens view international actors and understand their role in the region.

The survey reveals deep divisions across the region and broad variation in how foreign powers are perceived. However, it makes clear that the two most popular countries are Germany and Turkey. Both are admired by majorities in most countries, with support especially strong among the region's youth. Both of these countries have been deeply engaged in MENA in recent years, particularly focused on providing aid and assistance to the region. Germany has invested heavily in political, social and economic development, while Turkey has taken up the Palestinian cause and challenged Saudi Arabia and the UAE, while also standing up against President Bashar al-Assad of Syria. These efforts appear to be winning support for both countries.

Yet, a number of other countries are also broadly popular. Among global powers, support for China is the most widespread, with half or more having a positive view in the majority of countries surveyed. This level is significantly higher than for Russia or the United States, which likely comes from the fact that China is a relatively new power in the region focused primarily on economic relations to date, meaning much of the story of its engagement is yet to be defined. To this end, a relatively large share of citizens are unsure of their view of China or its leader, Xi Jinping, particularly when compared with Russia and the U.S.

Among parties to the Gulf rivalries, Qatar comes out ahead. In all countries surveyed except Libya, support for Qatar is equal to or higher than Saudi Arabia and it outpaces support for the UAE by even more. Given the broad support for Turkey across MENA, it is clear that the efforts of Saudi Arabia and the UAE to divide the region and isolate these powers has not succeeded. At least in relative terms, Qatar and its ally Turkey continue to win the battle for hearts and minds across the region.

However, Saudi Arabia's main Gulf rival, Iran, is in fact far less popular. Despite Iran's stated provision of aid to Gaza through its support for Hamas, the Shia power's meddling across a predominately Sunni region has not been rewarded with significant popularity in the eyes of Arab publics. In all countries surveyed, a third or fewer have a positive view of Iran.

These results underscore the importance of soft power over hard power. Despite relatively low levels of popularity for the U.S. across the region, youth tend to have more positive views towards it compared with older generations. U.S. cultural exports likely account for this difference, with many youths more engaged in U.S. popular culture than those who are older. Youth are also more supportive of Turkey and Qatar, both of which have tried to improve their image in MENA by promoting themselves in media markets across the region and standing for popular causes such as the rights of Palestinians. These efforts do appear to be paying off in terms of winning over more youth to their causes.

Leaders also play an important role. Support for the U.S. is relatively low, but it is far higher than support for former President Donald Trump, who was the least popular global leader included in the survey. Similarly, the Abraham Accords that have brought peace between Israel and Gulf countries are also not widely supported. Given the strong backing of these accords from Washington, it is clear that views of the Trump administration have hurt perceptions of the U.S. in MENA.

Meanwhile, by far the most popular European leader is German Chancellor Angela Merkel while Turkish President Recep Tayyip Erdoğan is by far the most popular regional leader. Both have demonstrated decisive leadership on issues toward the region. Merkel was instrumental in welcoming millions of refugees to Germany and the E.U. in 2015-6 while Erdoğan has stood up for the Palestinian cause and provided refuge to Arab dissidents from across the region. Likely, the actions of both leaders have helped increase support for their countries as they have supported policies that are broadly in line with the views of Arab publics.

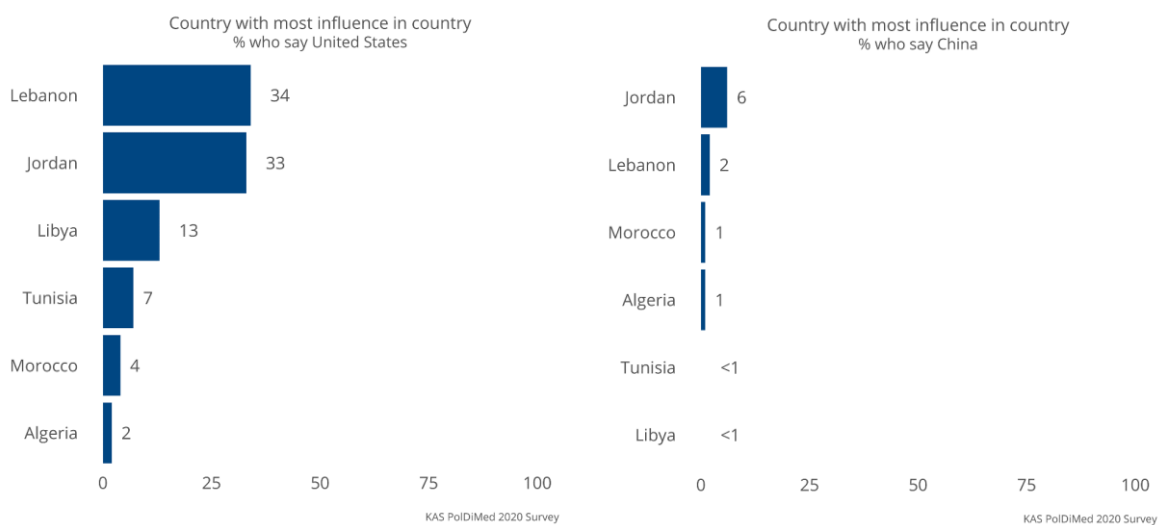
These findings are based on nationally representative public opinion surveys that included approximately 1,800 respondents in six countries: Algeria, Jordan, Lebanon, Libya, Morocco, and Tunisia, with a total of 10,841 respondents. Respondents were chosen randomly, meaning the results can be generalized to the broader population. The surveys were weighted to account for any random variations that may exist by gender, age, level of education, or geographic area. The margin of error for each country is less than ± 3 percent. All interviews were conducted between October 26 and December 8, 2020. The surveys were conducted on behalf of the Regional Program Political Dialogue South Mediterranean of the Konrad-Adenauer-Stiftung (KAS PolDiMed) by Arab Research and Analytics Associates (ARAA).

Influence in MENA

Many international actors are active in MENA seeking to advance their policy goals. A common perception has been that, until the last few years at least, the U.S. has been the most powerful foreign country in the region given its numerous interventions. While U.S. influence has waned, China's sphere of influence has been seen as expanding due to its Belt and Road Initiative (BRI) and its desire to expand relations with Arab countries, particularly in economic terms. Yet, fewer than half of citizens in any country surveyed say that either of these powers exerts the greatest influence in their country.

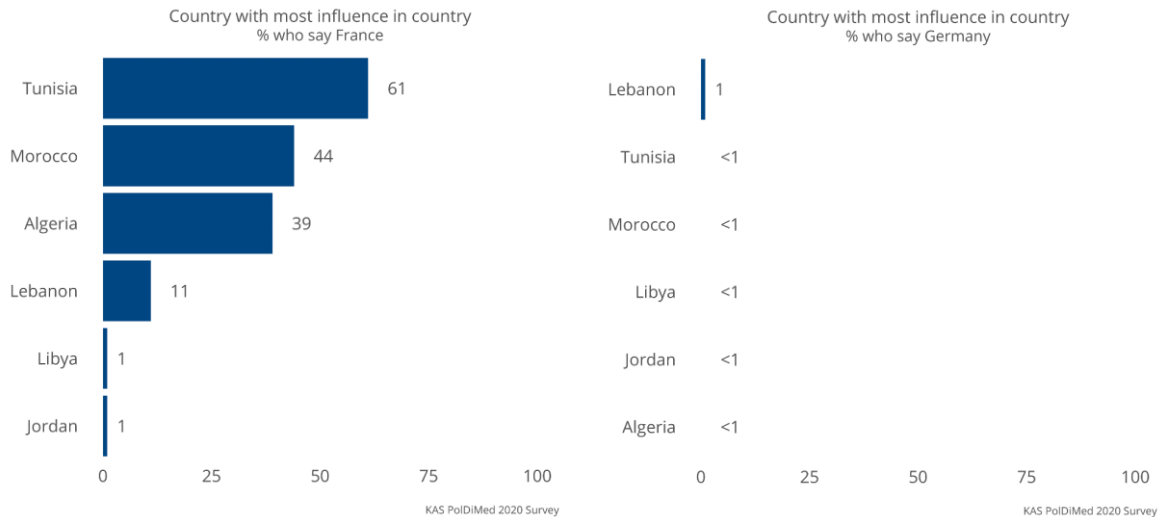
The U.S. is seen as a more significant power by countries in the Levant, with a third in Lebanon (34 percent) and Jordan (33 percent) saying it has the most influence. This is likely due to the significant role it plays in both countries. In Lebanon, the U.S. has sought to contain Hezbollah as part of its efforts to limit Iranian influence in the region. The U.S. is also a major ally and supporter of Jordan, including providing significant economic and military assistance to the kingdom. Across North Africa, relatively few say that the U.S. is the most significant power in their country. Only 13 percent do in Libya, while fewer than one-in-ten hold this perspective in Tunisia (7 percent), Morocco (4 percent), or Algeria (2 percent).

Although China is a growing power, today few citizens see China as the country with the most influence in their region. In all six countries surveyed, fewer than one-in-ten name China as the most powerful foreign country. Jordanians (6 percent) are the most likely to point to China while less than two percent think China has the most influence in all other countries surveyed. China's efforts to build its influence in MENA may eventually pay off, but citizens in the region do not yet see it as a major power, especially when compared with the United States.

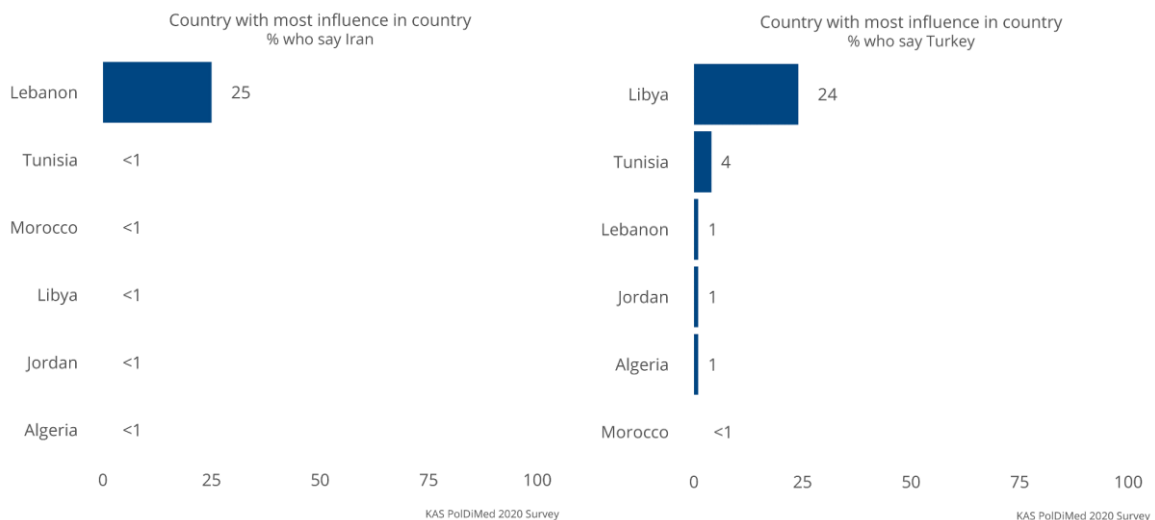


Europe has long played a major role in MENA and continues to have strong ties in the region. Across the Maghreb countries, citizens clearly view France as the dominant player. In Tunisia, 61 percent say France has the most influence. Similarly, in Morocco 44 percent say France as do 39 percent in Algeria. Historically, France was the colonial power or had a protectorate in all three and French is spoken by a large percentage of the population. These close ties with France help explain this general perception.

In contrast, although a major player in the European Union and significant donor country to MENA, very few Arab citizens say Germany represents the biggest influence in their country. One percent or fewer hold this view in all six countries surveyed, which could relate to the fact that Germany is a non-colonial power in the region with weaker historic ties to many of the countries than France.



The only other foreign powers seen as particularly influential in at least one country surveyed are Iran, Egypt, and Turkey. In Lebanon, a quarter say that Iran exerts the greatest influence, which reflects the close ties between Hezbollah and Tehran. However, in other countries fewer than one percent of respondents name Iran. Meanwhile, in Libya, roughly a quarter say Turkey (24 percent) or Egypt (22 percent) is the most significant foreign power. However, in all other countries surveyed, fewer than five percent point to either of these two powers.



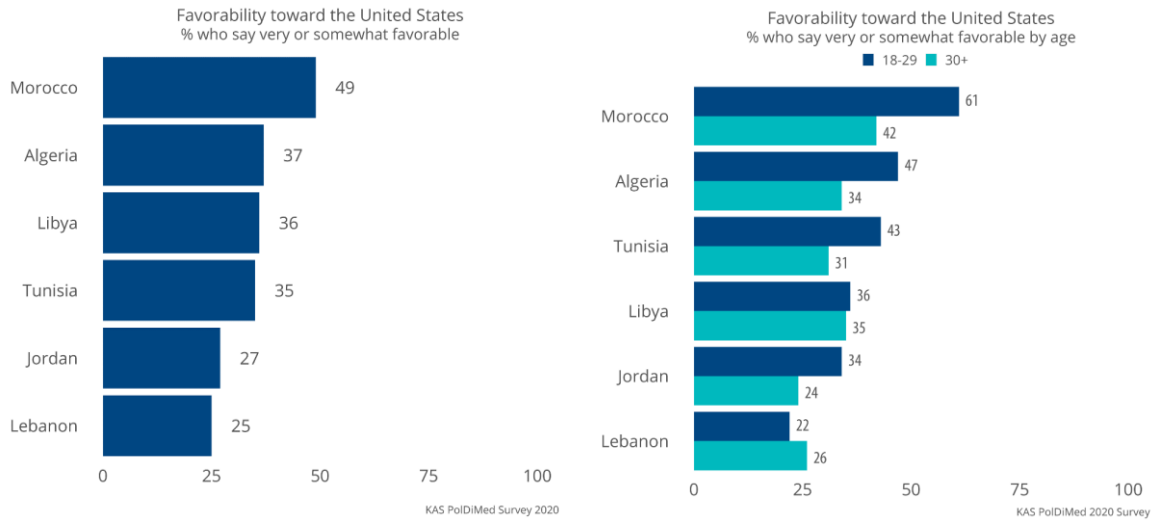
Despite Russia’s military interventions in Syria and Libya, few say that it is the most influential foreign power in their country. Across all countries surveyed, two percent or fewer hold this view. Similarly, five percent or fewer name Saudi Arabia in all countries and three percent or fewer say the UAE or Qatar in all countries. Despite the focus on Gulf rivalries as well as the increasing role of Russia across the region, relatively few citizens see these actors as the dominant player in their country.

International Powers

Beyond direct influence, soft power depends in large part on favorability of foreign powers. Notably, influence does not equate with popularity in the countries surveyed. Among global powers, views of the U.S. are relatively unfavorable. In no country does a majority say they have a very or somewhat favorable view of the U.S. Overall, U.S. favorability is highest in Morocco (49 percent), which is a longtime American ally. In other North African countries, support is lower with 37 percent of Algerians, 36 percent of Libyans, and 35 percent of Tunisians viewing the U.S. positively. Lebanese have the least favorable views of the U.S. at 25 percent, although views vary strongly by sect in Lebanon, with

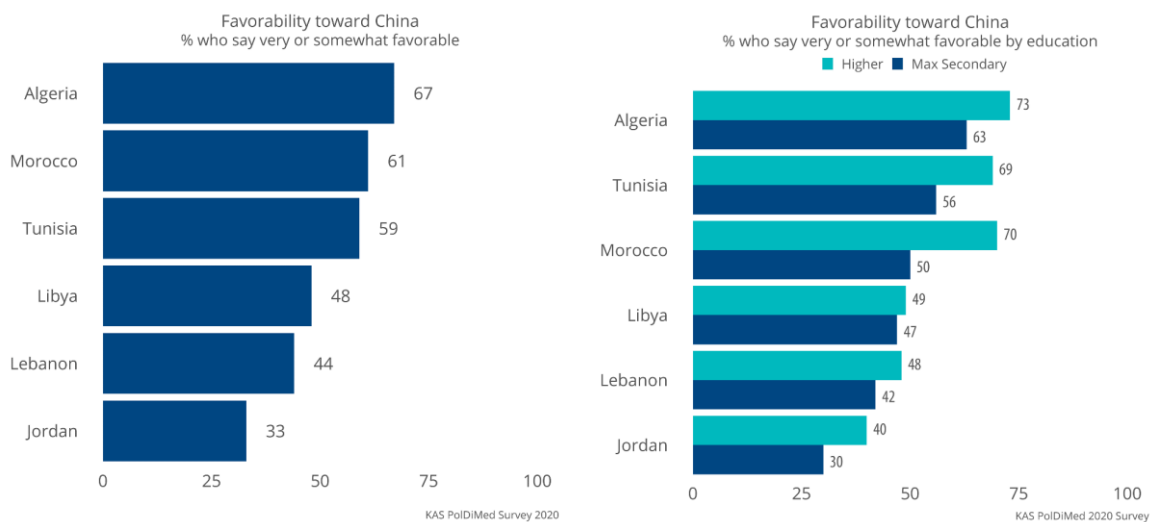
Christians (41 percent) having far more favorable view of the U.S. than other sects such as Sunnis (24 percent), Druze (18 percent), or Shias (3 percent).

Notably, younger citizens in MENA tend to have more favorable views of the U.S. than those who are older. Those aged 18-29 are more likely than those who are 30 and above to view the U.S. positively in Morocco (+19 points), Algeria (+13 points), Tunisia (+12 points) and Jordan (+10 points). Likely, youth are more engaged in U.S. cultural exports and have more positive views as a result.

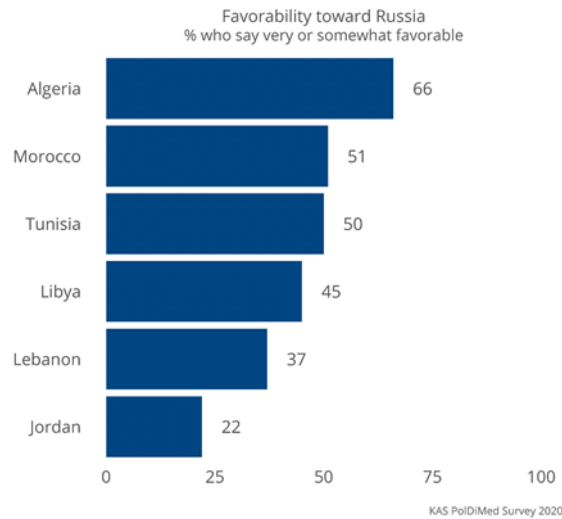


Overall, China is viewed far more positively than the United States. Majorities in Algeria (67 percent), Morocco (61 percent), and Tunisia (59 percent) have positive views, as do nearly half in Libya (48 percent) and Lebanon (44 percent). Only in Jordan (33 percent) does a clear minority have a favorable view of China. As a new power in the region, China is somewhat less well known than long-standing actors like the U.S. Few see it as a dominant power in MENA, which likely serves as a benefit to its image overall. Likely, this lack of familiarity and hope that initiatives like BRI might improve economic conditions are linked with the more positive views of China in the region.

Notably, in most countries there are not meaningful differences in views of China by age. However, those with higher levels of education are more likely to view China positively in most countries. The gap between those with a college level of education and those with a lower level is 20 points in Morocco, 13 points in Tunisia, and ten points in Algeria and Jordan, respectively. This finding could imply that those who are likely to know more about China are also more likely to have favorable views of it, perhaps due to the efforts China has made to provide assistance to MENA countries during the COVID pandemic.

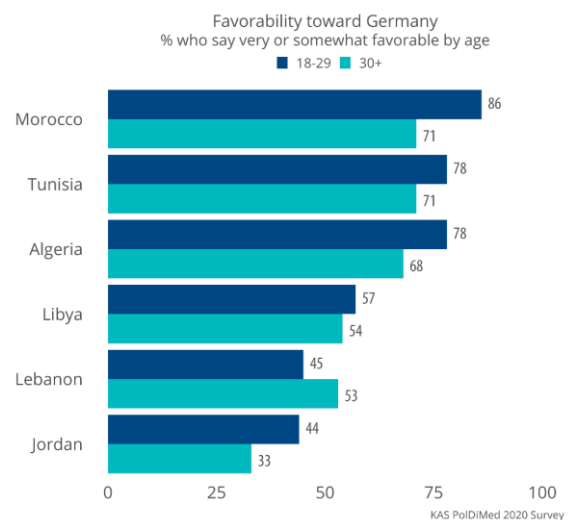
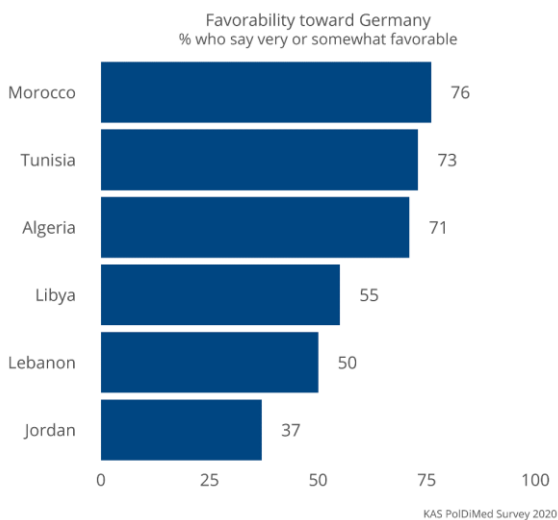


Views toward Russia fall between those of the U.S. and China. The Soviet Union played a major role in MENA during the Cold War, providing historic linkages, but Russia has recently reengaged the region after having limited influence for two decades. Algerians have, by far, the most favorable view of Russia with 66 percent holding positive views. Although Algeria was a leader of the non-aligned movement, its historic opposition to the U.S. may translate into more positive views of Russia. Meanwhile, half have positive views of Russia in Morocco (51 percent) and Tunisia (50 percent). In Libya, 45 percent do, which is tied to Russia’s intervention in the country. In Lebanon and Jordan, views are significantly less favorable at just 37 percent and 22 percent, which is most likely linked with Russia’s intervention into neighboring Syria.

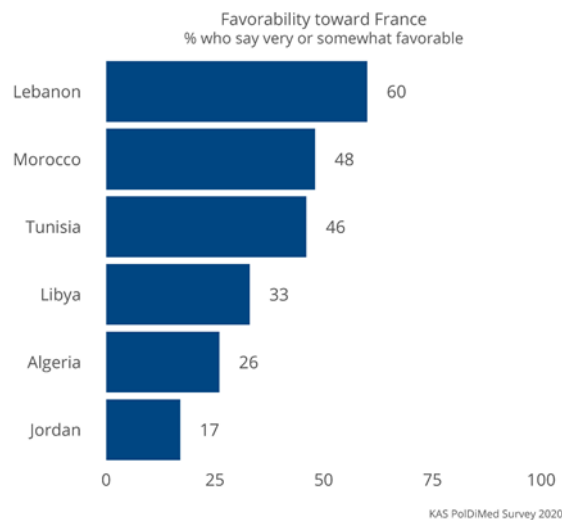


On average, Germany is viewed most positively among all foreign powers included in the survey. More than seven-in-ten have a positive view of Germany in Maghreb countries, including 76 percent in Morocco, 73 percent in Tunisia, and 71 percent in Algeria. In Libya, 55 percent view Germany favorably while half do in Lebanon. Only in Jordan (37 percent), do fewer than half view Germany positively. As a non-colonial power in MENA and a country that opened its doors to refugees in 2015, Germany appears to have won many hearts and minds in the region. Additionally, Arab Barometer data have shown that German companies are widely admired in MENA countries, which could also explain its high popularity.

As with the U.S., views of Germany are more positive among the region’s youth. Those aged 18-29 are more favorable toward Germany than those who are 30 and older in Morocco (+15 points), Jordan (+11 points), Algeria (+10 points), and Tunisia (+7 points). This difference could relate to the fact that much of this generation came of age during the refugee crisis of 2015-16.

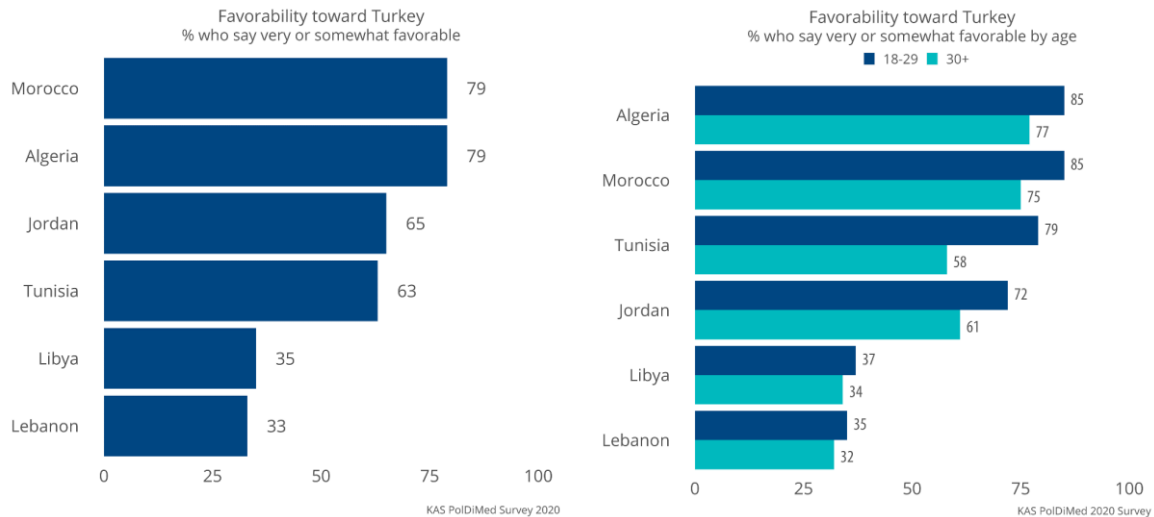


Although France is seen as a country with far greater influence than Germany in MENA, its overall favorability in the countries surveyed is far lower than Germany. Only in Lebanon does a majority have a positive view of France (60 percent), which is likely linked with President Macron's recent efforts to break the political impasse in the country. Elsewhere, fewer than half have a positive view of France. Moroccans (48 percent) and Tunisians (46 percent) have relatively favorable views, but only 33 percent in Libya, 26 percent in Algeria, and 17 percent in Jordan do. Tunisia and Morocco have strong historical links with France as a former colony and protectorate, respectively, but this history translates into divided views of the country today. In Algeria, France has long been viewed poorly due in large part to the brutal war of independence Algeria waged against its colonizer. In Libya, France was one of the powers that intervened in 2011 against the regime of Muammar Qaddafi, which set of a chain of events that has resulted in civil unrest over the last decade. France is not a major influencer in Jordan, but the comments by French President Emmanuel Macron about Islam have likely dampened support for France overall.



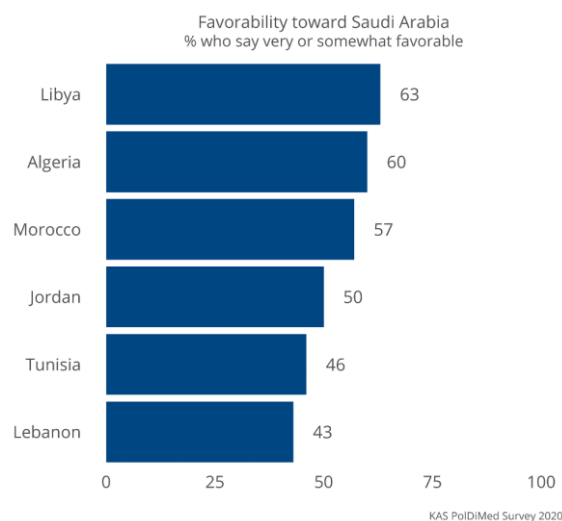
Regional Powers

Among regional powers, Turkey is, on average, the most popular across the countries surveyed. Turkey's popularity is highest in Morocco and Algeria, with 79 percent having a positive view, respectively. Support is also widespread in Jordan (65 percent) and Tunisia (63 percent). Turkey's support for Gaza and intervention in Syria against the regime of President Assad have been largely popular and are reflected in the views of citizens in these countries. In all four countries, youth aged 18-29 are more likely to view Turkey positively than those 30 and older, including by 29 points in Tunisia, 11 points in Jordan, 10 points in Morocco, and eight points in Algeria. It appears that Turkey's reengagement in the region and cultural outreach has won it increasing popularity among those who have come of age over the last decade plus.



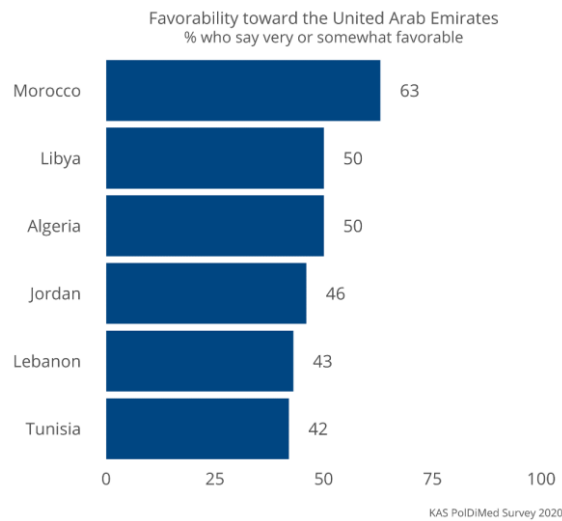
However, support is not universal. Turkey is viewed far less favorably in Libya, where Turkey has intervened militarily to support the internationally recognized GNA government based in Tripoli. Meanwhile, in Lebanon support for Turkey is also relatively low at 33 percent, although views are divided by sect with 69 percent of Sunnis having a favorable view compared with 32 percent of Druze, 19 percent of Christians, and 18 percent of Shias. Given Turkish support for Lebanon broadly, including through the provision of electricity, it is notable that only among Sunnis do more than half have a favorable view. This result suggests that sectarian identity is playing a major role in views toward regional powers regardless of their foreign policy or foreign aid.

Views of Saudi Arabia are generally mixed. Majorities in Libya (63 percent), Algeria (60 percent), and Morocco (57 percent) have positive views while half in Jordan say the same. Saudi favorability is somewhat lower in Tunisia (46 percent) and Lebanon (43 percent). Although relatively high, ratings of Saudi Arabia have generally declined since 2016 based on findings from Arab Barometer. Likely, ratings are relatively lower in Tunisia due to the fact former President Ben Ali was granted exile in the country after fleeing Tunisia and the controversial visit of Saudi Crown Prince Mohammed bin Salman to Tunis shortly after the murder of prominent journalist Jamal Khashoggi. In Lebanon, views are divided sharply by sect with Sunnis favoring Saudi Arabia while Shias have very negative views. Notably, views of Saudi Arabia do not differ significantly by age in the countries surveyed.

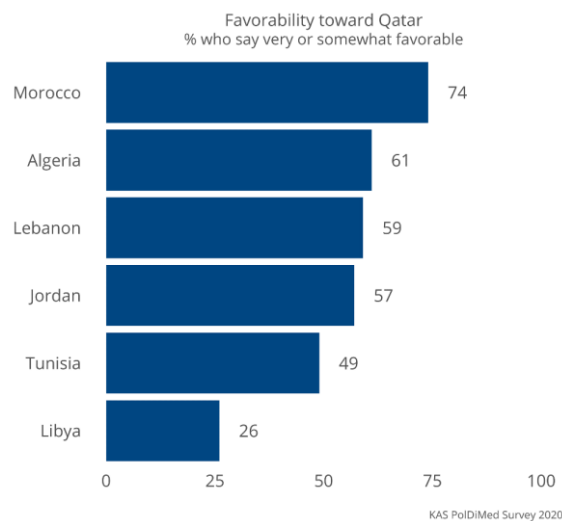


Views toward Saudi Arabia’s close ally, the United Arab Emirates, are also divided. Moroccans have the most positive view (63 percent), while half in Libya and Algeria hold very or somewhat favorable views of the UAE. Support is somewhat lower in Jordan (46 percent), Lebanon (43 percent) and Tunisia (42 percent). In part, this lower favorability compared with Saudi Arabia may be linked with the UAE’s recent peace treaty with Israel. Unlike Saudi Arabia, however, views toward the UAE are somewhat

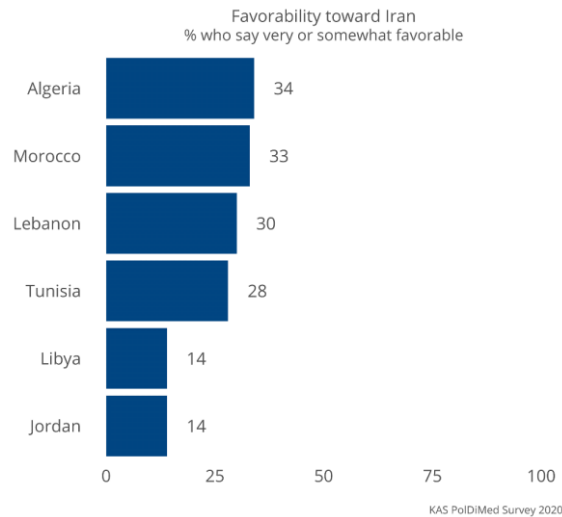
more positive amongst youth ages 18-29. This age group is more likely to favor the UAE than those who are 30 and older in Tunisia (+17 points), Morocco (+14 points), Algeria (+11 points), and Jordan (+5 points). The UAE’s continued rise over the last couple of decades likely has had a greater effect on youth compared to those who are older, which could explain this difference.



Qatar, a key rival of Saudi Arabia and the UAE, is viewed more favorably than these two countries. Three-quarters of Moroccans (74 percent) have a positive view of Qatar, as do about six-in-ten in Algeria (61 percent), Lebanon (59 percent) and Jordan (57 percent). In Tunisia, half (49 percent) have a positive view while only a quarter (26 percent) do in Libya. Qatar’s generally positive image is likely linked with its strong support for the Palestinian cause, support for Islamist opposition figures that have been repressed in many countries, and positive media exposure by Al Jazeera, a popular news station across MENA.

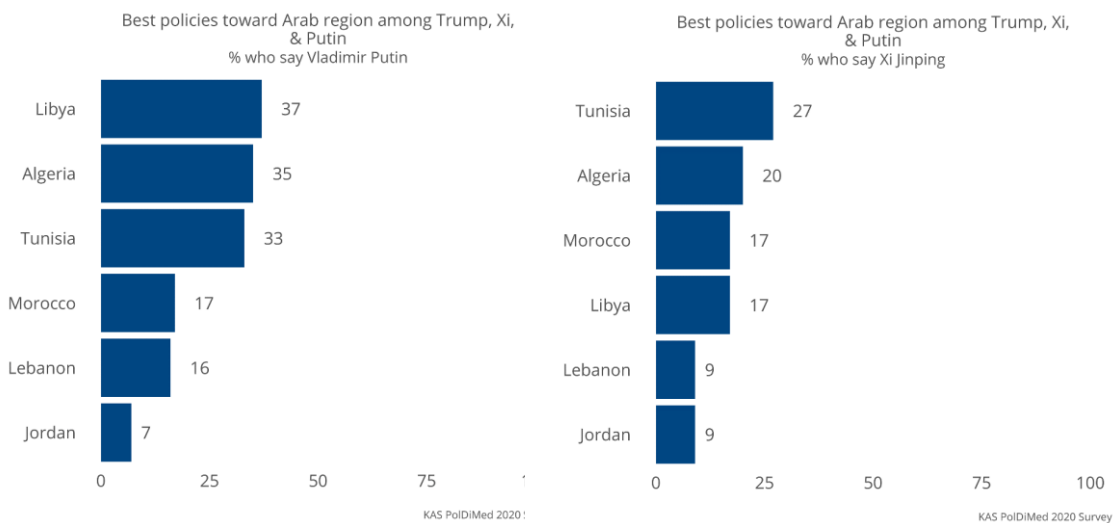


Meanwhile, Iran, Saudi Arabia’s archrival, is the least popular regional power with a third or fewer having a positive view in all countries surveyed. Algerians (34 percent) and Moroccans (33 percent) are the most positive toward Iran, while in Lebanon three-in-ten favor Iran. Again, views are deeply divided by sect with Shias having very favorable views and Sunnis very negative views within Lebanon. Elsewhere, 28 percent favor Iran in Tunisia and 14 percent in Libya and Jordan, respectively.



Views of World Leaders

Views of countries and their leaders are often linked, but there are important differences between the two. When asked about which major world leader had better policies toward the Arab region – U.S. President Trump, Chinese President Xi, or Russian President Putin – views are most positive toward Putin. In Libya, where Putin has intervened militarily in support of the Libyan National Army, 37 percent choose him over the other two while 35 percent prefer Putin in Algeria and 33 percent do in Tunisia. Support for Putin’s policies is lower in Morocco (17 percent) and Lebanon (16 percent), and Jordan (7 percent), however. Xi is the next most popular leader amongst the three, with 27 percent saying he has the best policies in Tunisia, 20 percent in Algeria, and 17 percent in Libya and Morocco, respectively. Only in Lebanon (9 percent) does he trail the other two.

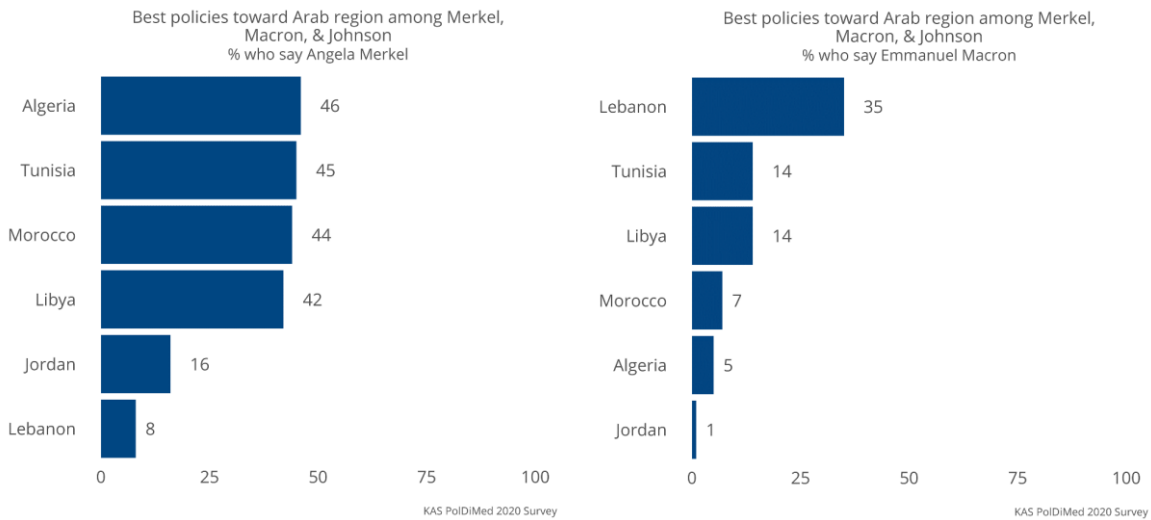


Support for Trump’s policies is by far the lowest across the countries surveyed, ranging from just 14 percent saying his policies are best in Libya to 5 percent in Algeria. Additionally, many citizens say that none of the three world leaders have good policies for the region, including 41 percent in Lebanon, 35 percent in Jordan, 23 percent in Morocco, and more than one-in-ten in Libya (14 percent), Algeria (13 percent) and Tunisia (12 percent). A substantial percentage are also unsure about who has the best policies, including a quarter in Morocco (25 percent) and Algeria (24 percent). In short, there is a high degree of uncertainty about which of these three leaders is best for the region.

The survey included a similar question about three key European leaders – German Chancellor Angela Merkel, French President Emmanuel Macron, and U.K. Prime Minister Boris Johnson. Overall, Merkel’s policies are the clear favorite among Arab publics. Fully 46 percent in Algeria, 45 percent in Tunisia, 44

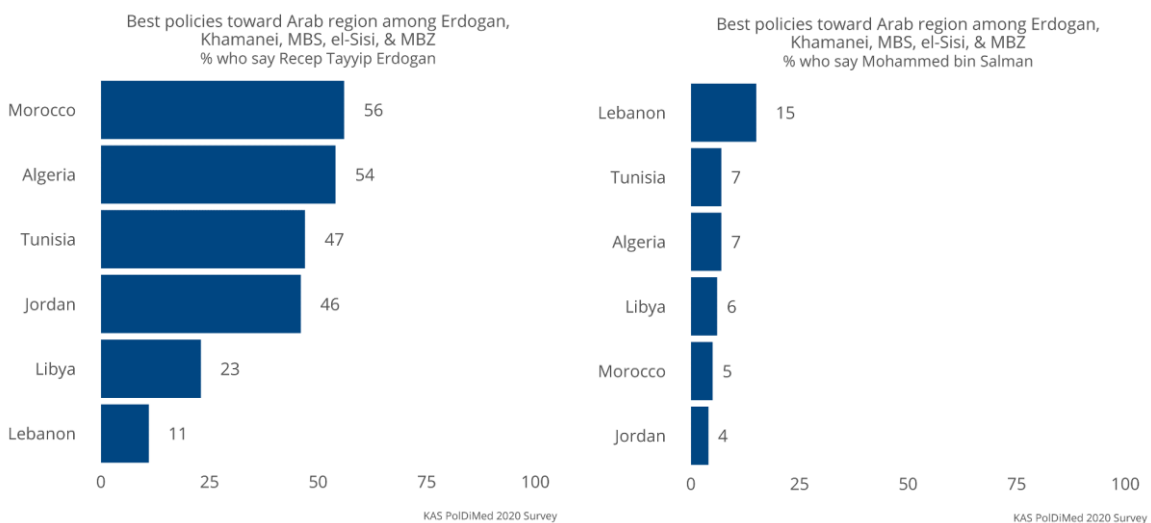
percent in Morocco and 42 percent in Libya favor her policies over those of the other two leaders. Support for Merkel is substantially lower, however, in Jordan (16 percent) and Lebanon (8 percent).

Among the three leaders, Macron is clearly preferred in Lebanon, where 35 percent favor his policies. Clearly, Macron’s recent intervention to try to resolve Lebanon’s political quagmire have paid dividends in the eyes of the Lebanese public. However, in other countries, Macron’s policies are most favored by only 14 percent to five percent of citizens. Johnson’s policies also have limited favorability, ranging from 14 percent in Tunisia to just three percent in Lebanon preferring him.



With the exception of Lebanon (33 percent) and Jordan (23 percent), relatively few say none of these three leaders have good regional policies, ranging from just 13 percent in Libya and Morocco to eight percent in Tunisia. However, again many say they don’t know, including roughly a quarter in both Algeria and Morocco.

Among regional leaders, the survey asked about the policies of five leaders – Turkish President Recep Tayyip Erdoğan, Iran Supreme Leader Ayatollah Ali Khamanei, Saudi Crown Prince Mohammed bin Salman, Egyptian President Abdel-Fattah el-Sisi, and UAE Crown Prince Mohammed bin Zayed Al Nahyan. Among these leaders, the clear favorite, as in previous Arab Barometer surveys, is Erdoğan. His policies are favored by 56 percent in Morocco, 54 percent in Algeria, 47 percent in Tunisia, and 46 percent in Jordan. He also comes in second in Libya at 23 percent. Only in Lebanon does he have relatively low support at just eleven percent.



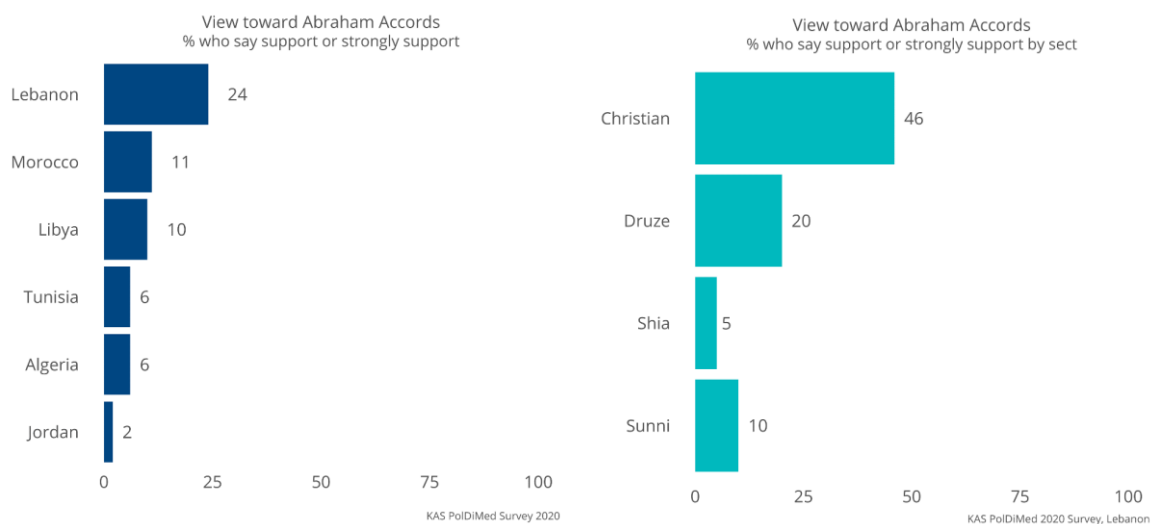
In Libya, support is highest for el-Sisi at 53 percent, which is clearly a direct function of Egypt’s strong influence in the country. His policies also have moderate support in Tunisia at twelve percent, which

may also be linked to spillover effects Tunisia has endured from the ongoing conflict in Libya. However, in the other countries surveyed, three percent or fewer say his policies are best.

Lebanon is by far the most divided, with 15 percent favoring the policies of Khamanei, 15 percent Mohammed bin Salman, eleven percent Erdoğan, and 8 percent Mohammed bin Zayed Al Nahyan. However, outside of Lebanon, very few citizens say that any of the Gulf leaders have the best policies, with none of them exceeding 10 percent in any other country.

Notably, the policies of regional leaders are relatively better known. Only in Lebanon does more than one-in-ten say that none of their policies are good while, with the exception of Jordan (33 percent), fewer than one-in-five say they don't know which has the best policies in all countries surveyed.

In part, low views of some of the Gulf Leaders may be driven by a rejection of the increasingly strong relations between Israel and some Gulf countries. The 2020 peace deals signed between Israel and the UAE and between Israel and Bahrain, known as the Abraham Accords, is viewed very poorly across the region. In all countries except Lebanon (24 percent), eleven percent or fewer say they support or strongly support this agreement, including just six percent in Tunisia and Algeria, respectively, and two percent in Jordan. In Lebanon, as with many other questions related to international relations, views differ dramatically by sect with Lebanese Christians (46 percent) being far more favorable toward the treaties than Druze (20 percent), Sunnis (10 percent), or Shias (5 percent).



Conclusion

These results demonstrate that MENA publics have nuanced understandings of foreign powers. Foreign countries that are non-colonial powers who, at least to date, are not seen as having major influence in the region tend to be most popular. Results from Arab Barometer find Germany companies to be widely admired in MENA while China's economic miracle over the past forty years and provision of financial aid appear to be leading to a relatively high level of favorability for both countries. Meanwhile, Turkey, another clear winner in the survey, has also undergone rapid economic development and promoted a foreign policy that is largely in line with views of Arab publics in much of the region.

The survey also suggests that military intervention is not a way to win broad support. Turkey sent forces to support the internationally recognized Government of National Accord in Libya, but its level of popularity in Libya is among the lowest of any country surveyed. Russia's interventions have also not endeared it to Libya, with fewer than half saying they favor Russia in this country. In short, greater direct military engagement is not linked with higher levels of support among Arab publics.

Yet, the findings also make clear that these ratings are not firmly fixed. The division in attitudes between youth and those who are older on views toward many foreign powers implies that as the foreign policies of countries change, they are likely reflected in those coming of age who are presented with a new perspective on the countries compared to their parents' generation. It appears views toward

external powers can change rapidly in response to ongoing events or in the longer term through the use of soft power strategies.

This possibility represents both a challenge and an opportunity in the near future. As the new Biden administration develops its foreign policy, it is possible that support for the U.S. will increase given Trump's low ratings. As China intervenes more directly and seeks to wield greater influence in MENA, it is likely that its favorability will decline based on the patterns observed for other countries in the survey. Meanwhile, it is unclear if Germany will remain as popular when a new Chancellor replaces Angela Merkel later this year, especially if the leader's views are not as well known or not as popular across MENA.

Conducted by:

Arab Research and Analytics Associates (ARAA) is a collaborative team of analysts specializing in public opinion research in the Middle East and North Africa. Its team combine decades of experience surveying this region in more than 20 countries. ARAA works with its clients to gather reliable and accurate data on public opinion across the region. ARAA has conducted surveys on behalf of Konrad-Adenauer-Stiftung, Stanford University, and Deakin University, among others. For more information, visit www.araaconsulting.com or contact info@araaconsulting.com.

**About KAS PolDiMed:**

The **Regional Program Political Dialogue South Mediterranean** of the **Konrad-Adenauer-Stiftung (KAS PolDiMed)** implements transnational projects from Tunis with reference to the entire area of the southern (Maghreb) and eastern Mediterranean (Mashrek).

It is designed to strengthen political dialogue, social and economic integration in the region and to promote long-term partnership with the European Union. The Konrad-Adenauer-Stiftung is a non-governmental German political foundation with over 100 offices worldwide and 12 programs in the MENA region. Nationally and internationally, we work for peace, freedom and justice through political education. The consolidation of democracy and development cooperation are our particular concerns. For more information, visit www.kas.de/poldimed or contact info.poldimed@kas.de.

**Konrad-Adenauer-Stiftung e. V.**

Thomas Volk
Director
Regional Program Political Dialogue South Mediterranean
Tunis, Tunisia
www.kas.de/poldimed
info.poldimed@kas.de



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