TESEV Foreign Policy Programme

The Perception of Turkey in the Middle East 2011

Mensur Akgün, Sabiha Senyücel Gündoğar

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The viewpoints in this report belong to the authors, and they may not necessarily concur partially or wholly with TESEV's viewpoints as a foundation.

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Preface

Mensur Akgün & Sabiha Senyücel Gündoğar, *TESEV Foreign Policy Programme*

This report contains the findings of TESEV Foreign Policy Programme's third survey of the perception of Turkey in the Middle East. Conducted by KA Research in 16 countries between October 19th and December 15th, the survey questioned 2323 people by telephone or face to face. As in previous years, the survey contains striking results.

Despite falls in some countries, Syria and Iran being the most significant, we see that the general perception of Turkey in the region has not changed fundamentally. In fact of the countries that regional opinion was sought, Turkey has surpassed even Saudi Arabia into first place with 78% of the region having a favourable opinion of it.

Despite strained relations with Israel, 77% of respondents think that Turkey had a positive impact on peace in the region. 75% think that Turkey should contribute to the Palestine question, while 61% see Turkey as a model.

These are consistent with last year's results. And accordingly, our conclusions are similar to those in previous years. First of all, the positive perception of Turkey in the Middle East is becoming structural and, despite some doubts, Turkey is regarded as a model. As such, it seems that unless the leadership in Turkey make a wrong move, this favourable view of Turkey is set to remain.

The second finding of note is that despite a recent hardening of Turkey's foreign policy, the support given to Turkey's mediatory role continues. The third finding is that Turkey is not just a political power but is perceived as an economic power too. When we asked respondents which country was the region's strongest economy now and in ten years, currently Saudi Arabia leads Turkey. But it should be noted that Turkey is seen as the region's coming economic leader in ten years.

However, there are some results relating to the 'Arab Spring' that should be noted here. First of all, only 52% of the people in the countries surveyed believe that the events have had a positive effect on their country. As was expected, Syrian respondents were the least positive with only 22% thinking that the events had a positive effect on their country. The most positive were in Libya (92%), Tunisia (89%) and Egypt (75%). When asked the same question is asked about the region, average support increases to 60%.

Actors both in and outside the region, especially Turkey, should also take note of the high levels of support for peaceful protest. Even in Libya only 32% of respondents support violent protest, whereas the regional average support for violent protest was 20%. However decision makers should be aware that even in a country that has 'benefited' from NATO intervention – namely Libya – support for peaceful protest is 95%, whereas in Syria only 5% of respondents support violent protest.

There are many other highlights. Some can be found in this report, whereas others will soon be published in the Foreign Policy Programme's more comprehensive study that will follow. We are confident that the following summary and future studies will contribute to policymaking in Turkey and the world as well as future discussion.

Key Findings

1. The region's most important issue: the economy

Despite demands for democratisation in the Arab world, the survey confirms that the region's biggest issue is the economy. When asked what the region's most urgent issue is, 21% identified the economy, whereas 40% said it was the most urgent issue in their own country.

2. The region's future: hopeful

62% of respondents felt more positive about the future of the region than they did a year ago. However, when asked about the future of their country, the proportion of positive responses drops to 47%.

3. Support for protest: if it's peaceful yes

A regional average of 75% of respondents support peaceful protest, whereas only 20% support violent protest.

4. The region's biggest threat: Israel

With 47%, Israel is seen as the Middle East's biggest threat. The USA follows Israel with 24%.

5. The most favourably thought of country: Turkey

Turkey takes first place with 78% of responses being favourable. Turkey is followed by the United Arab Emirates (UAE) with 70%. Palestine (66%), China (65%), Saudi Arabia (64%), Lebanon (64%) and Egypt (62%) all have similar levels of favourability.

6. The country that contributes most to peace in the region: Turkey

Of the countries and organisations outside of the region, 77% say Turkey has had a positive impact on peace in the region – the most popular of those asked.

7. A model country: Turkey

Since the start of the protests in the region, the question of whether Turkey is a model for the countries of the region has moved up the agenda. 61% of respondents answered 'yes', 22% said 'no' and 13% were undecided.

8. The country expected to play a role in conflict resolution: Turkey

71% of respondents agree with the statement "Turkey should play a greater role in the Middle East". Indeed, 70% think Turkey has become more influential over recent years and 75% believe Turkey should play a mediatory role in the Israel-Palestine conflict – this is as high as 84% in Palestine. These results are similar to those from the 2009 and 2010 surveys.

9. The region's future economic leader: Turkey

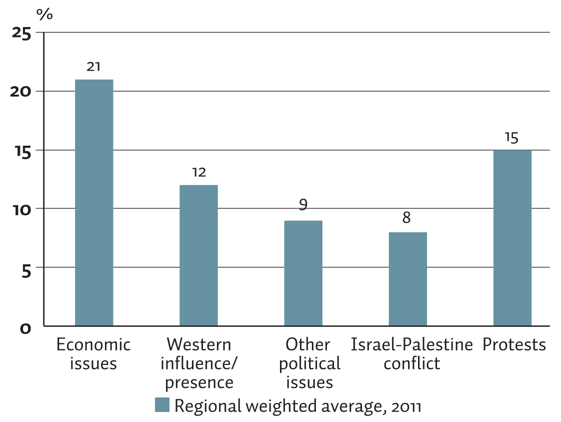
Like last year, Turkey is seen as the region's strongest economy in ten years time (25%), followed by Saudi Arabia (16%) as the next most common response. Only 4% see Egypt as the region's strongest economy in the future.

10. The least supportive of Turkey: Syria

When asked about Turkey only 44% of Syrian respondents had a favourable view, 30% thought that Turkey's response to the developments of the last year was positive and 31% thought Turkey could be a model. However, a significant proportion of Syrian respondents (58%) believe Turkey can still contribute to peace in the region.

Section 1: Regional Overview

FIGURE 1: THE MOST URGENT ISSUE FACING THE REGION



In the countries surveyed in 2011, respondents were asked what they thought both the Middle East's and their country's most urgent issue was (as detailed in figure 1 and 3). As seen in figure 1, respondents identified economic issues (21% of the regional weighted average) as the region's primary issue in the countries surveyed in 2011[1]. The region's second most important issue (with 15% of responses) was the recent protests – this figure is 21% (as a weighted average) in the countries where a relatively successful change has taken place, namely Egypt, Tunisia and Libya.

Looking at the responses in individual countries, the protests featured highly among responses in Yemen (27%) and Saudi Arabia (26%). The protests were least resonant in Iran with just 2% of responses.

The third most popular response to the question of what is the most urgent issue facing the region was the Western influence/presence (12% of the regional weighted average). Of the countries surveyed, this response features most prominently in Iraq (26%) and Iran (15%). The fourth most common response was other political issues with 9% of responses.

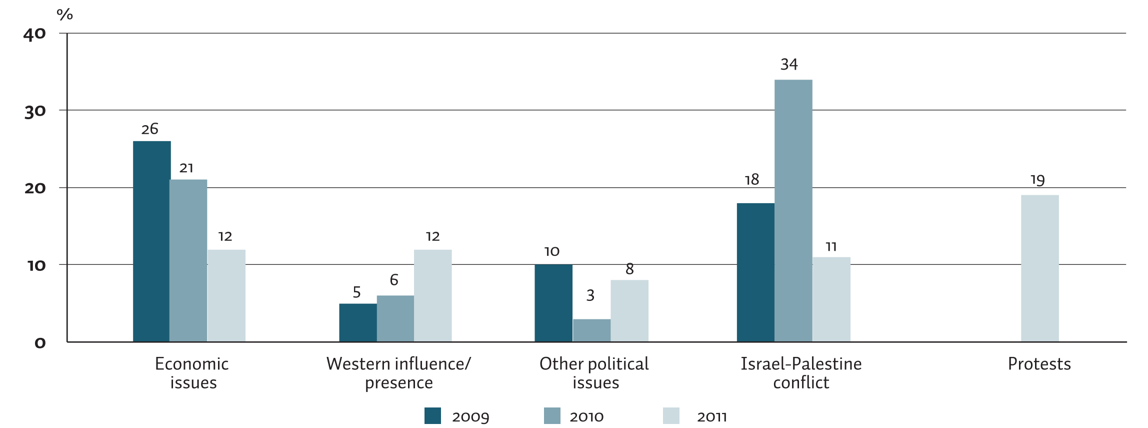
Unlike the 2009 and 2010 surveys[2], the Israeli-Palestinian conflict does not rank as one of the region's most pressing concerns. In the 2011 survey, the Israeli-Palestinian conflict slipped to a lowly fifth place with only 8% of the regional weighted average of responses. Indeed, because of unprecedented developments in the region, in certain countries newer issues have become more prominent.

However, the Israeli-Palestinian conflict was seen as an important regional issue by 29% of Tunisian respondents – the highest response among the countries surveyed. 18% of respondents from Palestine saw the conflict as the most important issue just behind economic issues (20%). These two countries were followed by Jordan (16%), Egypt (14%), Lebanon (12%), Libya (12%) and the Gulf countries (11%) as attaching importance to the issue.

1 **The 2011 survey was conducted in Egypt, Jordan, Lebanon, Palestine, Saudi Arabia, Syria, Iraq, Iran, Tunisia, the Gulf countries (Qatar, Bahrain, Kuwait, Oman and the UAE), Yemen and Libya. The Gulf countries (Qatar, Bahrain, Kuwait, Oman and the UAE) are grouped together as one.**

2 **The 2009 survey was conducted in Egypt, Jordan, Lebanon, Palestine, Saudi Arabia, Syria and Iraq. In 2010 we added Iran to the survey.**

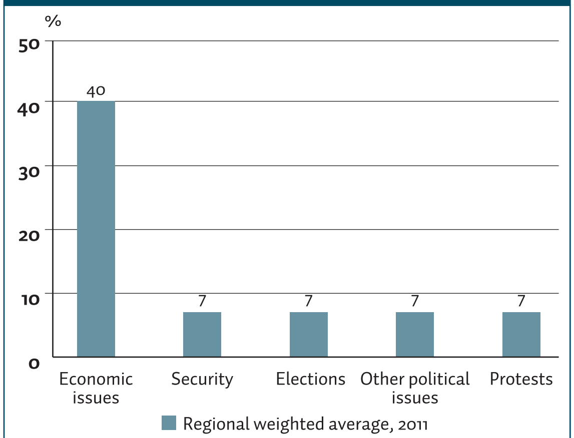
FIGURE 2: THE MOST URGENT ISSUE FACING THE REGION 2009-2011: 7 COUNTRY WEIGHTED AVERAGE



In order to compare the survey findings of the most urgent issue facing the region over three years, figure 2 shows the results for a seven country[3] regional weighted average for 2009, 2010 and 2011. In 2010, the Israeli-Palestinian conflict was the most common answer with 34% of the regional weighted average of responses. However, in the same seven countries, only 11% of respondents identified the conflict as the region's most prominent issue in 2011. Indeed, as figure 2 demonstrates, the change in the region in 2011 has affected the relative importance placed upon other issues, including the Israeli-Palestinian conflict.

However, the issue is still prominent. In a separate question respondents were asked whether they supported Palestine's application for full membership of the United Nations. 85% responded positively. Despite the fact that the Israeli-Palestinian conflict has slipped from being the most important regional issue recently due to regional events, respondents support the Palestinians' campaign for international recognition.

FIGURE 3: THE MOST URGENT ISSUE FACING THE RESPONDENT'S COUNTRY

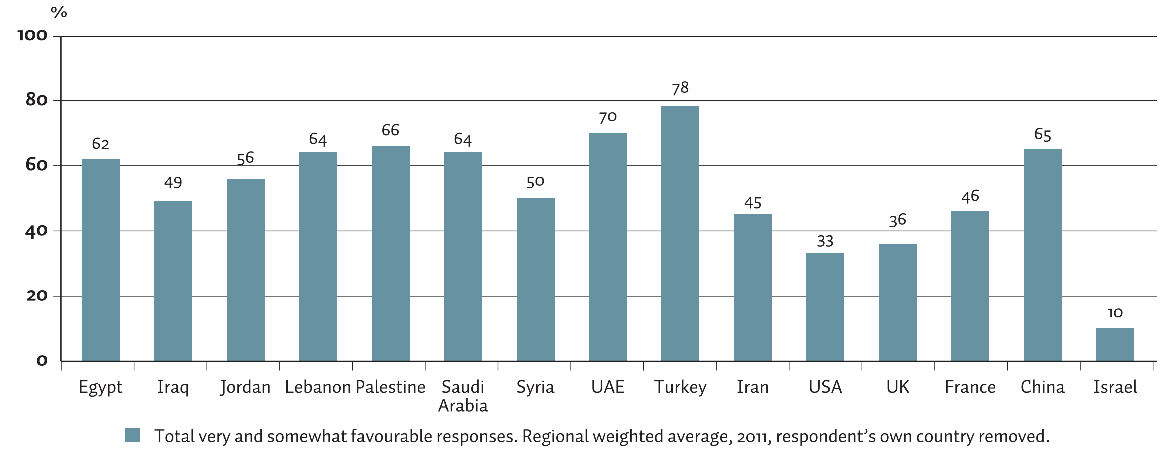


As demonstrated in figure 3, when asked about the most pressing issue facing their country, the most popular response identified was also economic issues albeit with a higher percentage (40% of the regional weighted average). Economic issues were followed by security concerns, elections, protests and other political issues. These responses attract similar levels of importance, all with 7% of responses.

While the economy is seen as the most important problem in most countries, the issue is particularly prominent among Iranian (70%), Jordanian (59%) and

3 **Egypt, Jordan, Lebanon, Palestine, Saudi Arabia, Syria and Iraq were the seven consistent countries surveyed in 2009, 2010 and 2011.**

FIGURE 4: WHAT IS YOUR OPINION OF THE FOLLOWING COUNTRIES?



Lebanese (55%) respondents. Only in Libya and Palestine does the issue not rank first among concerns. Respondents in Libya identified security as their primary concern (27% of responses) with the economy only attracting 10% of responses – well below most other countries. As expected, the Israeli-Palestinian issue is Palestinian respondents' primary concern (34%).

Those experiencing political transition highlighted the elections; 22% of Egyptians noted them as their most urgent issue.

Another striking result was in Iraq where "the relations between ethnic and religious groups" ranked among responses for the first time in 2011 with 10% - it did not feature as a statistically significant answer in 2009 or 2010. The timing of the 2011 survey likely reflects anxieties related to the US withdrawal from Iraq.

In figure 4, respondents' views of a range of 19[4] countries both in and outside the region are detailed. As can be seen, the only country to garner more than 70% of favourable or somewhat favourable responses was Turkey. This is similar to the results of the 2009 and 2010 survey[5] – in the past two years Turkey followed Saudi Arabia as the second most favourably seen country.

In the 2011 survey, Turkey ranked first with a regional weighted average of 78%. Turkey was followed by the UAE (70%), Palestine (66%) and China (65%), Saudi Arabia and Lebanon (64%) and Egypt (62%).

The countries viewed least favourably in 2011 were Israel (only 10% of regional weighted responses were very or somewhat favourable), the US (33%) and the UK (36%). Only 45% of respondents have a favourable opinion of Iran, leaving it the fourth least popular country out of a total of 19, followed closely by Iraq (49%).

Of the other EU countries that respondents' opinion was sought, 52% had a very or somewhat favourable opinion of Germany and 46% had a very or somewhat favourable opinion of France.

When comparing the results of 2011 with 2010 and 2009 as a 7 country regional weighted average, it can be seen that Turkey's level of favourability remains at 80%, while Saudi Arabia has experienced a 10% drop since 2010, to 71%.

4 **The other four countries were Germany (52%), Russia (50%), Brazil (52%) and Venezuela (47%).**

5 **The regional weighted average result was 75% in 2009 and 80% in 2010.**

Again looking at the regional average over the three years, drops in favourable opinion of Iran and Syria are noteworthy. Syria fell by 24 percentage points to 46% and Iran by 11 points to 47%. On the other hand, Palestine recorded the greatest increase in favourable responses – it rose from 55% in 2010 to 69% in 2011. Both Egypt and Iraq recorded slight increases, while the favourability of other countries remained similar.

REGIONAL SECURITY

Figure 5 outlines regional opinion of which countries or organisations had a positive impact on peace in the Middle East and North Africa. To this end, Turkey is seen as the country that has played the most positive role with 77% of regional weighted responses being either to a great or moderate extent. Even in Syria, where respondents were the most negative, 58% of respondents viewed Turkey's impact positively.

As shown in figure 5, most other countries and organisations are seen in a similar light apart from NATO, which is the institution that is seen as having the least impact (46% thought it had had a positive impact). But regional discrepancies are noteworthy. As expected, Libyan respondents had the most positive view of NATO's impact on peace in the region (70% to a great or moderate extent). The least positive on the subject of NATO were Iranian and Syrian respondents (31 and 28% respectively).

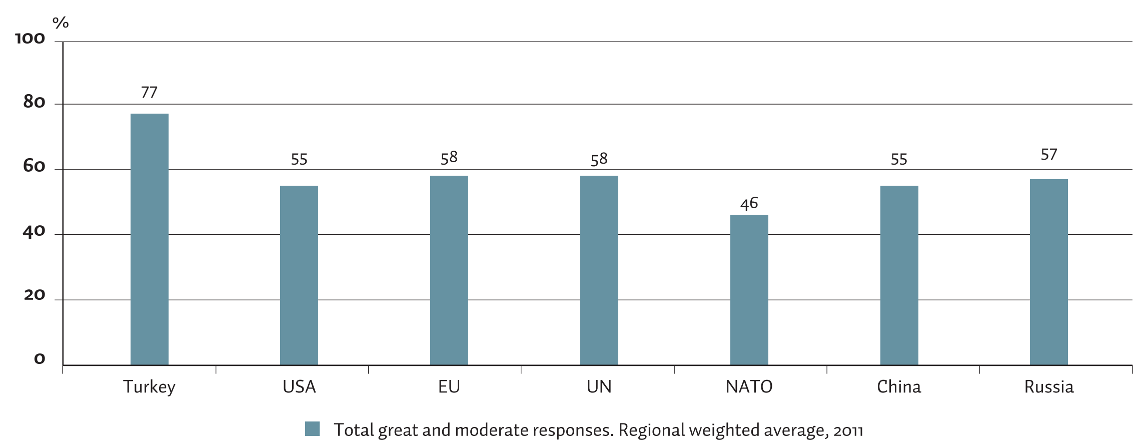
The United Nations' impact on peace in the region was also seen most positively in Libya (83%), but also comparatively well in Tunisia (73%), Palestine (71%) and the Gulf countries (69%).

The EU's impact on peace in the region is also highly regarded in Libya (81%). Indeed, outside of Syria, Iran and Iraq, the EU's impact is generally seen positively. Iran is the most critical of the EU's impact in the region where only 36% of respondents felt that the EU had a great or moderate impact on peace in the region.

Predictably, the least positive assessment of the US's impact on peace in the region was also in Iran (only 28% of responses were positive). Likewise, only 37% of Iraqi respondents thought that the US had a positive impact to this end. Again Libyan respondents saw the US as having the most positive impact on peace in the region (86%).

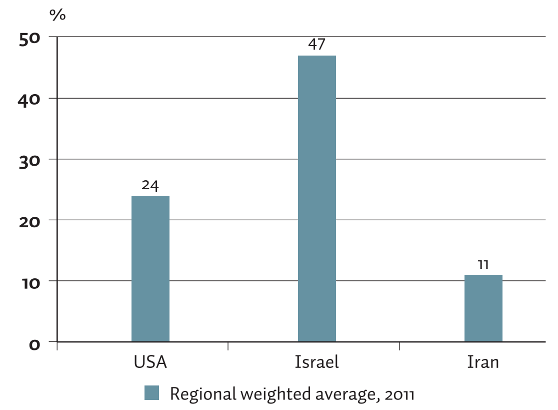
When asked about China's impact on peace in the region, Syrian respondents were the most positive – 77% felt China had a positive impact on peace in the region. Yemen follows with 75%. On the other hand, only 26% of Iraqi respondents thought that China had a positive impact on peace in the region.

FIGURE 5: POSITIVE IMPACT ON PEACE IN THE REGION



Finally, when looking at perception of Russia's impact on peace, Syrian respondents were the most positive (76%) followed by Yemenis (69%). The least positive was Iraqi respondents (40%).

FIGURE 6: WHICH COUNTRY POSES THE GREATEST THREAT TO THE REGION?



When asked to identify the country that poses the greatest threat to the region, Israel was the most common response with 47% of the regional weighted average. The US was the second most common response (24%) followed by Iran (11%).

When looking at the responses from individual countries, Libyan respondents were the most wary of Israel – 71% perceived Israel as the greatest threat to the region. Only 31% of Iranian respondents saw Israel as the greatest threat to the region, making it the least fearful of Israel of the countries surveyed. As in previous years, Iranian respondents saw the USA as the greatest threat to the region – this year 47% viewed the US as the region's greatest threat.

In terms of perception, views of Iran have not radically changed. Saudi (30% of responses) and Iraqi (24%) respondents see Iran as a significant threat to the region. In addition to these two countries, Jordan, Lebanon, the Gulf countries and Yemen see Iran as the second greatest threat to the region (as opposed to the USA). Syrian respondents were the least fearful of Iran.

Figure 7 looks to trace the perception of threat over the three years in seven countries. As can be seen, there has been an increase in the perception of Israel as a threat from 40% in 2010 to 52% in 2011. Although the USA is still the second most common response at 16% it has registered an 10% drop from 2010. It is now at almost the same level as Iran (14%).

FIGURE 7: WHICH COUNTRY POSES THE GREATEST THREAT TO THE REGION? 2009-2011: 7 COUNTRY WEIGHTED AVERAGE

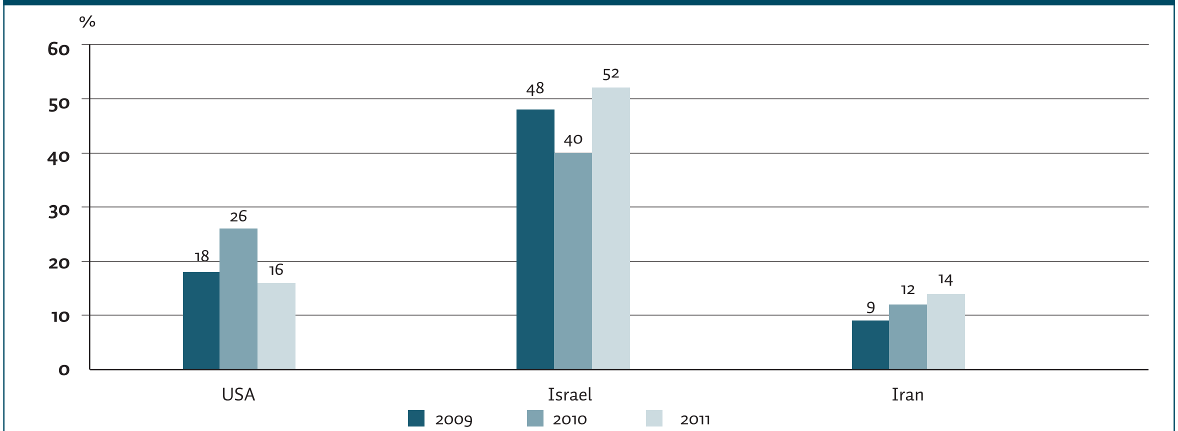
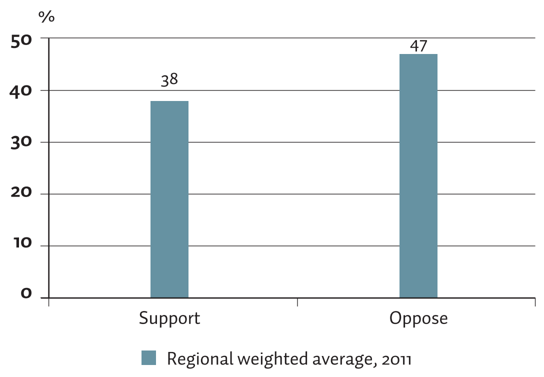


FIGURE 8: REGIONAL SUPPORT FOR AN IRANIAN NUCLEAR WEAPONS PROGRAMME



As figure 8 shows, when asked if respondents supported or opposed Iran developing nuclear weapons, 38% supported while 47% opposed. There was a marked increase in the number of Iranians opposed to developing nuclear weapons (from 15% to 34%), whereas 51% supported such a programme.

The two countries that are most opposed to an Iranian weapons programme are the two that see it as a significant threat to the region – Saudi Arabia and Iraq. 76% of Iraqi and 67% of Saudi respondents oppose Iran developing a nuclear weapons programme.

The most supportive country of Iran developing nuclear weapons is not Iran but Syria - 52% of Syrian respondents were in support.

When asked why respondents supported Iran developing nuclear weapons (if they answered positive to the previous question), the most common answer given was to ensure its own security (24%). The second most popular response was to confront Israel.

Comparing this year's responses to last year's (using a 7 country weighted average), there seems to have been a change of emphasis. In 2010 the most common response was other states possess them (19%), whereas to confront Israel was ranked fourth with only 7% of responses. Participants in the same seven countries in 2011 felt that the most important justification for an Iranian nuclear weapons programme was to ensure its own security (17%) followed by to confront Israel (14%). Although support for Iran's nuclear weapons programme has decreased, those supporting Iran against Israel seems to have increased.

FIGURE 9: WHY DO YOU SUPPORT AN IRANIAN NUCLEAR WEAPONS PROGRAMME?

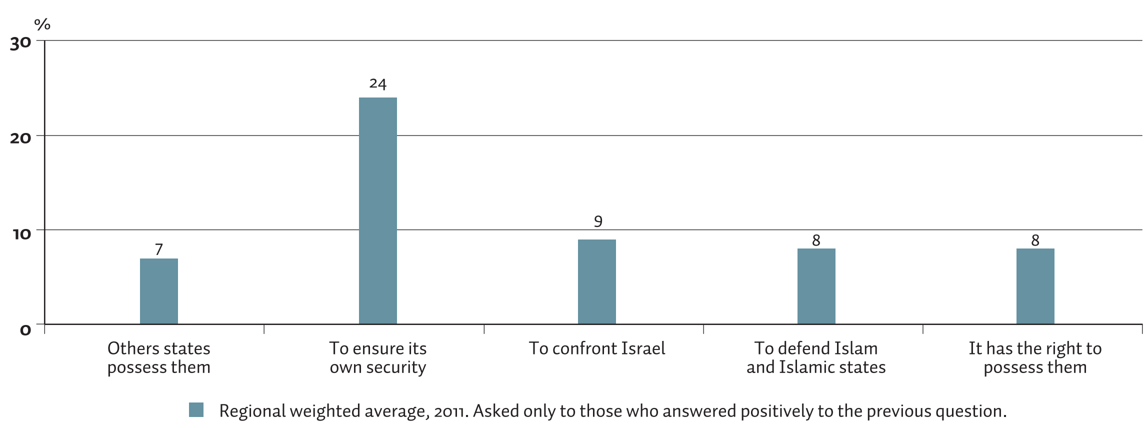
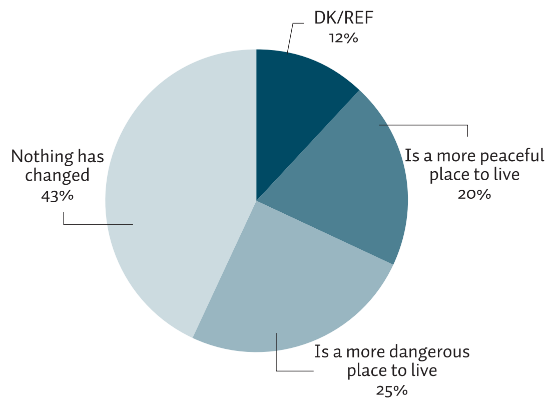


FIGURE 10: THE WORLD AFTER OSAMA BIN LADEN

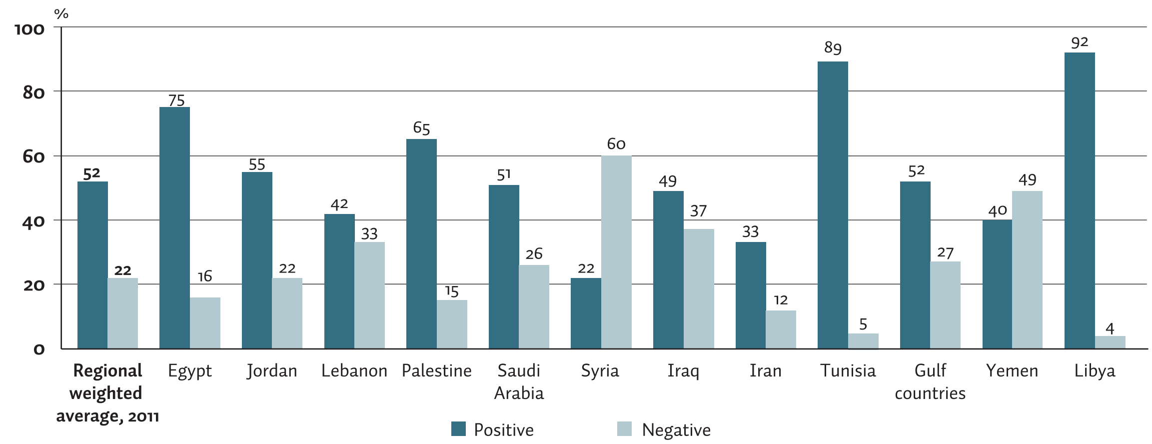


Respondents were also asked what they thought the death of Osama bin Laden means for the world. 43% thought it made no difference, 25% thought the world has become a more dangerous place and 20% thought the world is a safer place because of it.

Iraqi respondents were the most supportive of the view that the world had become a safer place (50%), followed by Libyan respondents (36%). Iranian respondents were the most ambivalent – 61% felt that nothing had changed – a theme common in many countries.

Section 2: A Region in Transition

FIGURE 11: THE EFFECT OF THE ARAB SPRING ON THE RESPONDENTS' COUNTRY

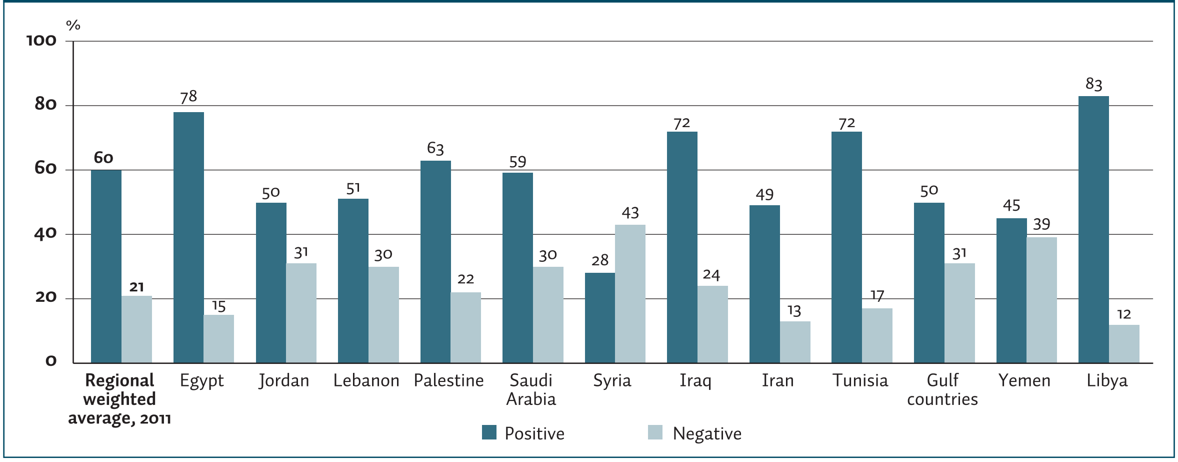


In this section, we include questions that focused on respondents' views of recent developments in the region. Overall, as demonstrated in figure 11, 52% of respondents had a positive view of the effect of regional developments (commonly known as the Arab Spring) on their country, while 22% had a negative view – 19% were undecided.

Looking at in-country responses, Libyan (92%), Tunisian (89%) and Egyptian (75%) respondents were the most positive. Although still undergoing a period of immense change, it is clear that the public in the three countries is overwhelmingly positive. Palestinian respondents also thought that regional events had had a positive effect on their country (65%).

As expected, Syrian respondents were the least positive with only 22% thinking that regional events had had a positive effect on their country. Other countries where less than half of respondents had a positive view were Iran (33%), Yemen (40%), Lebanon (42%) and Iraq (49%).

FIGURE 12: THE EFFECT OF THE ARAB SPRING ON THE MIDDLE EAST



As can be seen in figure 12, when respondents were asked if they thought regional developments had a positive or negative effect on the region, the regional weighted average was 8% higher than the previous question at 60%. 21% saw the developments in a negative light, while 7% remained neutral or undecided.

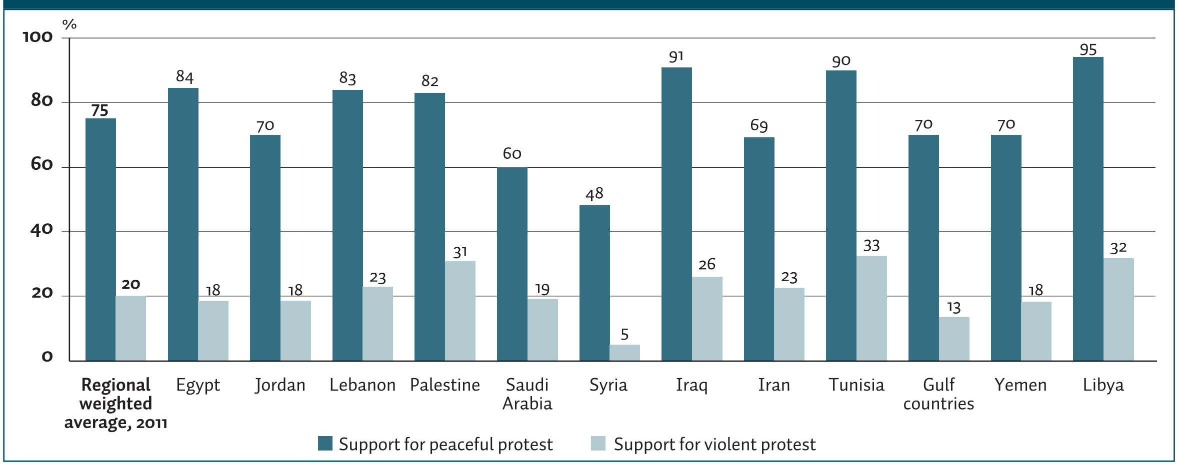
As was the case in the previous question, the most positive group were Libyan respondents – 83% felt that the events had had a positive effect on the region. Libyan respondents were followed by Egyptians (78%), Tunisians and Iraqis (both 72%) in being the most positive.

Iraq differs from Libya, Egypt and Tunisia, however, in that respondents felt that regional events had not had a positive effect on their country but had had a positive effect on the region. Likewise, 49% of Iranian respondents felt that the events had had a positive effect on the region but only 33% felt that they had had a positive effect on their country.

As can be seen in figure 12, Saudi Arabia, Lebanon, Jordan, the Gulf, Yemen, Syria and Iran all fall below the regional average.

In a separate question, respondents were asked how they felt about the future of the region in light of

FIGURE 13: SUPPORT FOR PEACEFUL AND VIOLENT PROTEST



recent developments. 62% of respondents said they felt more positive than 12 months ago. However, when the respondents were asked to assess whether they felt more or less positive about their country's situation, positive responses dropped to 47%.

Survey respondents were asked if they supported both violent and non-violent protests throughout the region. Regional average support for peaceful protests was 75% while support for violent protest was 20%. Interestingly, 21% of respondents, as a regional weighted average, did not even support peaceful protest.

If we are to look at the difference between in-country responses, Libya (95%), Iraq (91%) and Tunisia (90%) were the most supportive of peaceful protest. As can be seen in figure 13, Egyptian, Lebanese and Palestinian respondents also expressed significant support for peaceful protest.

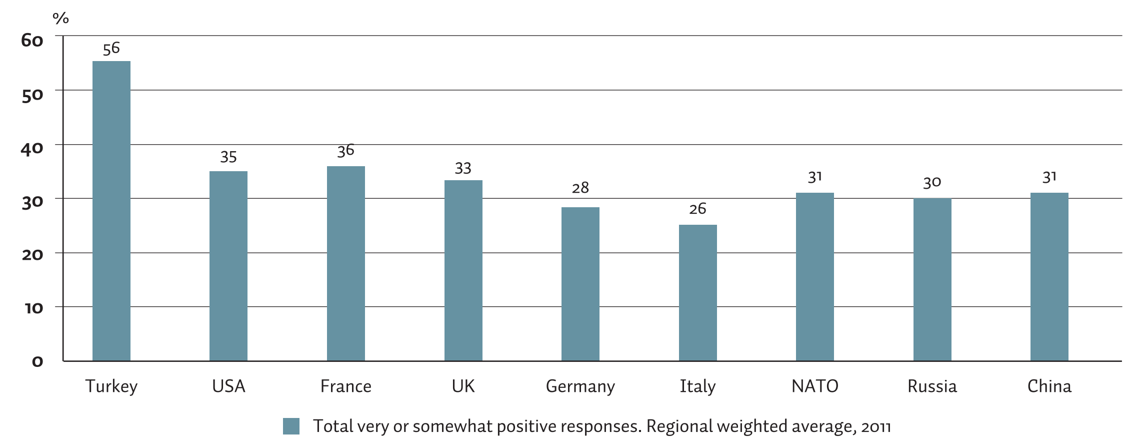
Syrian responses to the question are also worthy of note; 45% of respondents did not support peaceful protest. Further, a total of 91% of Syrian respondents opposed violent protest.

Throughout the region, support for violent protest is significantly lower than support for peaceful protest. However, in all countries bar Syria, support for violent protest is not insignificant. Libyan and Tunisian respondents were the most supportive of violent protest (33% and 32% respectively), followed closely by Palestinian respondents (31%).

As shown in figure 14, respondents were asked to evaluate the effect certain countries and institutions had on the regional events of 2011. 56% of the regional average stated that Turkey had had a positive effect on events, with 16% believing it had had a negative effect. France (36%) followed Turkey as the country to have had the biggest impact on events in the eyes of the region.

However, a significant proportion of respondents had a neutral or undecided view of all countries and institutions apart from Turkey. The USA was viewed the most negatively – 42% of respondents felt the USA had had a negative effect on regional events. The USA was followed by the UK and NATO with 37% and 36% of respondents respectively believing they had had a negative effect.

FIGURE 14: POSITIVE EFFECT ON THE ARAB SPRING



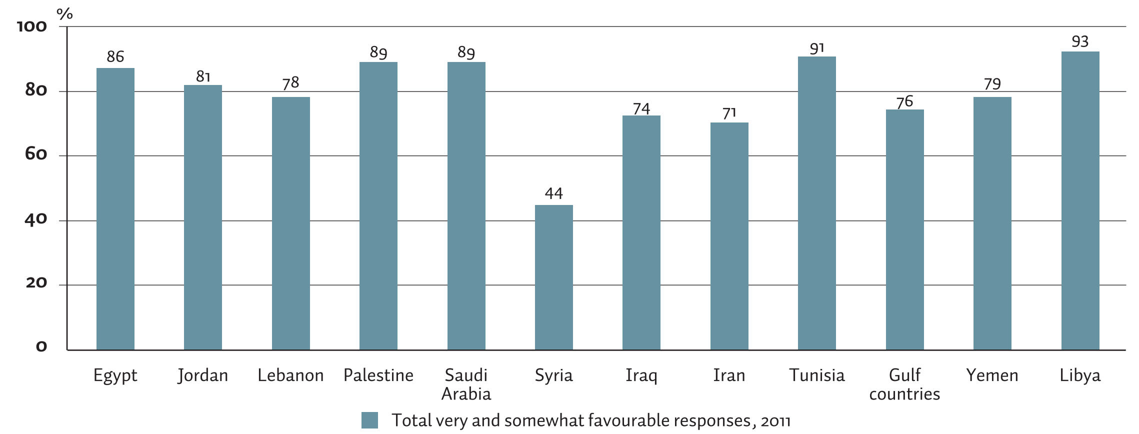
When looking at responses from individual countries, Libyan respondents identified Russia as the only country that had played a negative role in events (only 26% of Libyan respondents felt that Russia had had a positive effect on events).

On the other hand, a majority of Syrian respondents (62%) felt that Russia had had a positive effect whereas as all other countries or organisations were seen as having had a negative effect.

In Egypt, Palestine, Jordan, Saudi Arabia and the Gulf countries, Turkey is the only country that a majority of respondents felt had had a positive effect on regional events. However, Iranian respondents felt that all countries and organisations had had a negative effect.

Section 3: Turkey and the Middle East

FIGURE 15: FAVOURABLE OPINION OF TURKEY



In section 1, we noted that the regional weighted average favourability of Turkey was 78%. In figure 15, we detail the country by country perception of Turkey. As can be seen, the country with the most favourable view of Turkey is Libya, where 93% of respondents had a somewhat or very favourable opinion of Turkey.

Tunisia follows closely, where 91% of respondents had a somewhat or very favourable opinion of Turkey. As do Saudi Arabia and Palestine (both 89%).

Generally speaking, opinion of Turkey is high throughout the countries surveyed. The only exception is Syria, where only 44% of respondents had a somewhat or very favourable opinion of Turkey.

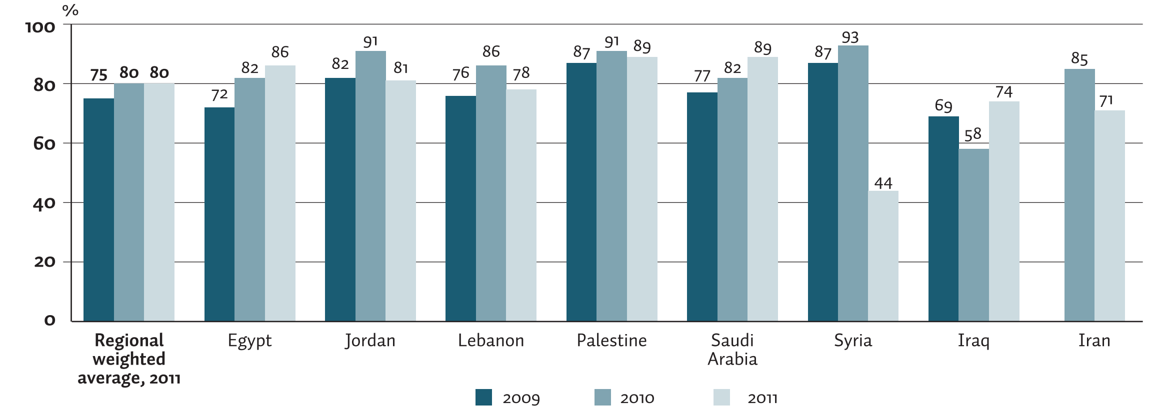
If we look comparatively at responses over a three year period, there are clear changes in opinion of Turkey. As seen in figure 16, the most radical change is in Syria, which in 2010 had the most favourable view of Turkey in the region. It now has the least – only 44% of Syrian respondents have a positive view of Turkey compared to 93% in 2010 and 87% in 2009.

The other country where a significant fall in opinion of Turkey can be seen is Iran – favourable opinion of Turkey fell from 85% to 71% over the course of a year. Other countries that registered falls are Jordan, Lebanon and Palestine, although overall opinion remains high in the three countries.

On the other hand, Turkey witnessed an increase in favourable opinion in Iraq (16% increase), Saudi Arabia (7% increase) and Egypt (4% increase). As can be seen in figure 16, the percentage of respondents (as a seven country weighted average) with a favourable view of Turkey has remained at 80% in 2010 and 2011.

Asked about their view of Turkey's response to the events of the last 12 months, 64% of respondents were positive. This is higher than the responses given to the question of Turkey's impact on the events of the last

FIGURE 16: FAVOURABLE OPINION OF TURKEY 2009-2011: 7 COUNTRY WEIGHTED AVERAGE



12 months - as can be seen in figure 18, 56% of respondents thought Turkey had had a positive impact on the events of the last 12 months. Although a 7% difference between Turkey's impact on and Turkey's response to is not huge, it is significant enough to be worthy of note.

Respondents from Syria and Iran were the least positive of Turkey's response (30% and 42% respectively), although there were a significant proportion of undecided respondents in both countries. Only 12% of Iranian respondents thought that Turkey's response to events was somewhat or very negative, whereas a more significant 49% of Syrians thought that Turkey's response was negative.

However in the three countries that have undergone significant change (Egypt, Tunisia and Libya), 80% or more of respondents highlighted the impact Turkey had had on events.

FIGURE 17: TURKEY'S RESPONSE TO THE EVENTS OF THE LAST 12 MONTHS

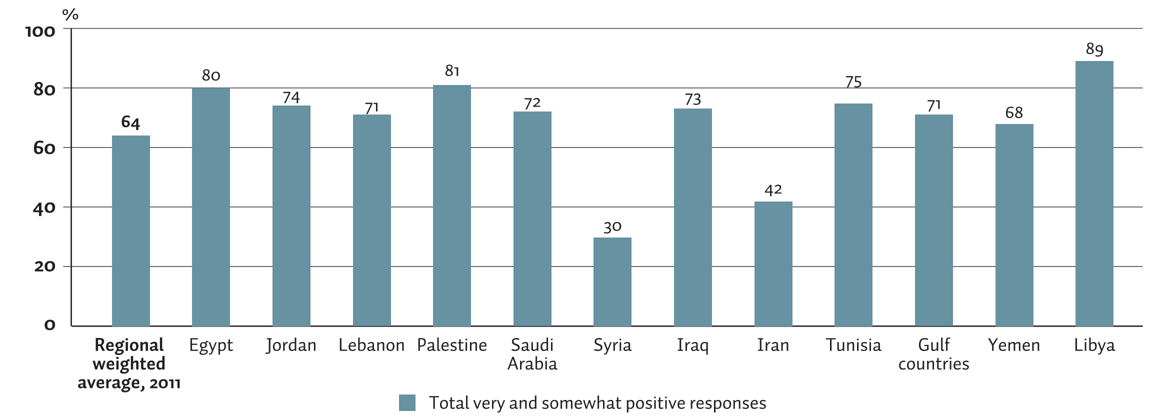


FIGURE 18: TURKEY'S ROLE IN THE MIDDLE EAST

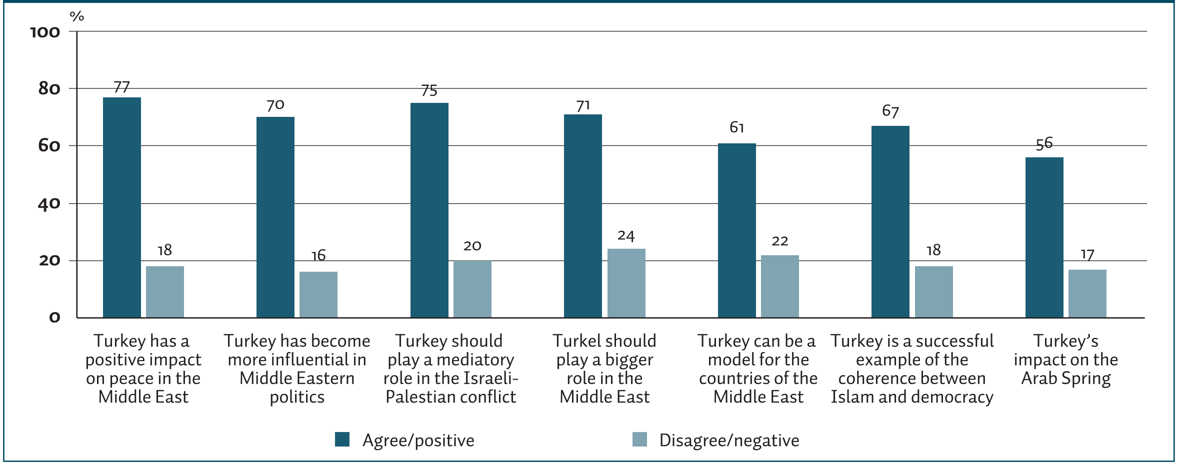


Figure 18 looks to outline a variety of questions in order to better understand how people in the region see Turkey's role in the Middle East and what they see in Turkey. Generally speaking, the country is seen as an acceptable actor, whose presence is welcomed in the region and respondents appreciate the values that it represents.

As seen in figure 18, when asked whether Turkey had contributed to peace in the Middle East, 77% of respondents replied positively. Syrian respondents were the least positive – only 58% felt Turkey had a positive impact on peace in the region. Respondents in Palestine, Egypt, Tunisia and Libya had the most positive view of Turkey's impact on peace in the region. Indeed, in comparison to the EU and US, Turkey's impact on peace in the region was acknowledged by far more respondents (77% versus 58% and 55% respectively). Admittedly more than half see both the EU's and US's impact in a positive light.

However, when asked about Turkey's impact on the events of the last 12 months (commonly referred to as the Arab Spring) as opposed to its impact on peace in the region, the number of positive responses is lower (56%). As has been noted elsewhere, only in two countries, namely Iran and Syria, do less than half of respondents have a positive view of Turkey's impact on the events of 2011 (42% and 34% respectively).

70% of respondents felt that Turkey had become more influential in the region in recent years, 75% thought that it should play a mediatory role in resolving the Israeli-Palestinian conflict (84% of Palestinians agreed with this proposition) and 71% of respondents thought that Turkey should play a larger role in the region.

Turkey's mediatory role and the premise that it should play a greater role in the region find least support in Syria and Iraq, whereas all other countries support Turkey in this respect. The 2011 results mirror those from 2009 and 2010. As such, it's clear that there is support for Turkey to play a greater role in the region and to mediate in the Israeli-Palestinian conflict.

Again, as in previous years, respondents saw Turkey as an exponent of the combination of Islam and democracy – 67% of respondents felt that it successfully blended the two. The highest levels of support were seen in Libya (91%), Tunisia (86%) and Egypt (80%), whereas the lowest levels were witnessed in Syria (45%), Iran and Iraq (51% in both).

In 2011, the question of whether Turkey is a model for the region or not has become a topic of increasing discussion. 61% of respondents from the region thought that Turkey can be a model for the region, whereas 22% thought not and 13% remained undecided. If we look at the results on a country-by-country basis, respondents in Egypt and Tunisia are the most supportive of the Turkish model (both 78%). Palestinians are almost equally supportive (77%), as are Libyan and Lebanese (75%) respondents. On the other hand, Syrian respondents (31%) and those from Iran (47%), Iraq (48%) and the Gulf countries (53%) are the least supportive of the concept of the Turkish model.

FIGURE 19: WHY CAN TURKEY BE A MODEL?

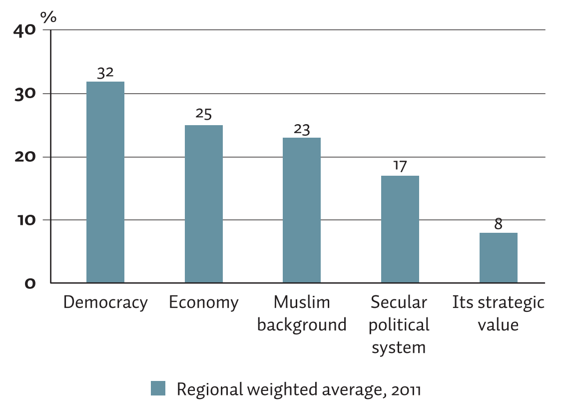
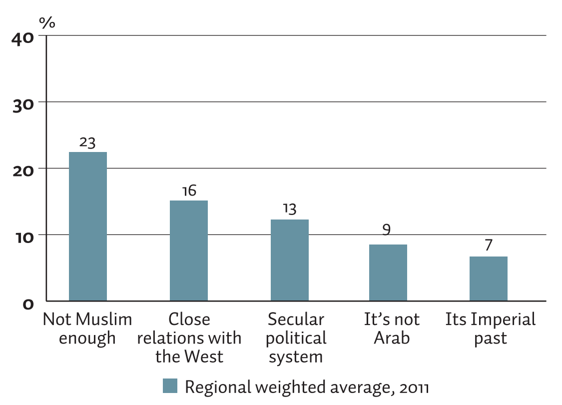


FIGURE 20: WHY CAN'T TURKEY BE A MODEL?



As was the case in the 2010 survey, those who responded positively to the question of whether they thought Turkey was a model were asked to explain why they thought so. As demonstrated in figure 19, the most common response was Turkey's democracy (32%), followed by its economy (25%), Muslim background (23%), secular system (17%) and its strategic value (8%).

When comparing these results to the previous year's responses, a change in emphasis is worth mentioning. In 2010, Turkey's Muslim identity was the most prominent response, whereas in 2011 Turkey's democracy was the reason cited most often in all countries bar Iran – Iranian respondents highlighted Turkey's economy (35%) as the foremost reason why they see it as a model for the region.

Iraqi responses to the question are also worthy of consideration. For Iraqis, Turkey's democratic regime, its stance in support of the Palestinians and Muslims, strategic value and its Muslim background were the reasons why Turkey is a model.

To those that felt that Turkey could not be a model for the region, the most common reasons given were Turkey is not Muslim enough (23%), its close relations with the West (16%) and its secular political system (13%).

Comparing the results in figure 20 to the previous year's findings, the three most common responses are the same albeit in a different order. Unlike 2010, the fact that Turkey is not an Arab country was highlighted by 9% of respondents. This reason was particularly prominent in Palestine (25%), the countries of the Gulf (22%) and Iraq (19%). 29% of Iraqi respondents also noted Turkey's imperial past as a reason, whereas 33% of Libyans, 32% of Saudis and 31% of Yemenis thought Turkey is not Muslim enough to be a model for the countries of the region.

TURKEY AND THE EUROPEAN UNION

51% of the regional weighted average of respondents supported Turkey's membership of the EU (56% on a 7-country average), while 23% opposed it and 19% were undecided.

Turkey's membership receives little support amongst Syrian and Iranian respondents (37% and 38% respectively), whereas Libyans were the most supportive of those surveyed (71%).

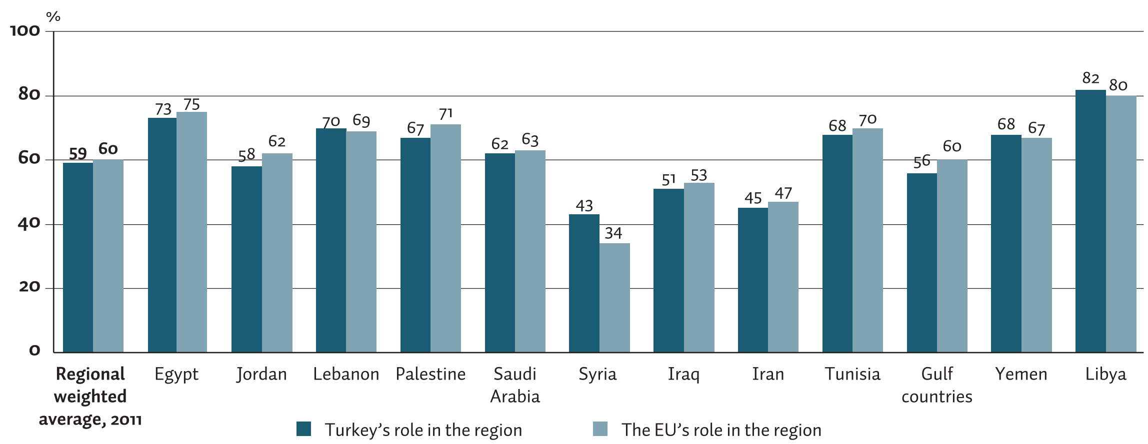
FIGURE 21: SUPPORT FOR TURKEY'S EU ACCESSION, 2009-2011: 7 COUNTRY WEIGHTED AVERAGE

When compared to the results from the 2009 and 2010 surveys as a seven country weighted average (figure 21), regional support for Turkey's accession has been fairly consistent.

As can be seen in figure 22, when asked whether they thought accession would affect Turkey's role in the Middle East, 59% of respondents were positive. The most likely respondents to be supportive of Turkey's EU membership were from Libya (82%) and Egypt (73%).

In the 2011 survey we also asked respondents whether Turkish accession would benefit the EU in the region. 60% of respondents said that Turkish accession would have a positive effect on the EU's role in the region. When looking at the results on a country-by-country basis, the most positive respondents were from Libya (80%), Egypt (75%), Palestine (71%) and Tunisia (70%). Syrian respondents were again the least supportive (38%) followed by Iran (47%).

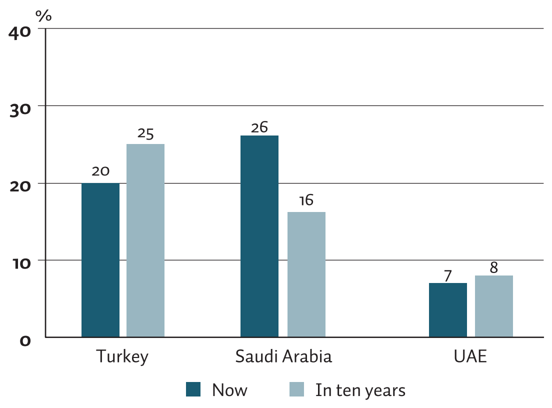
FIGURE 22: THE IMPACT OF TURKEY'S EU ACCESSION ON:



ECONOMIC AND CULTURAL RELATIONS

To better understand the economic and cultural influence Turkey has in the region, we added several questions to the 2010 survey. These were repeated in 2011. As can be seen in the following graphs, the 2010 survey's findings have been reinforced by those in 2011.

FIGURE 23: THE REGIONS'S STRONGEST ECONOMY: NOW AND IN TEN YEARS



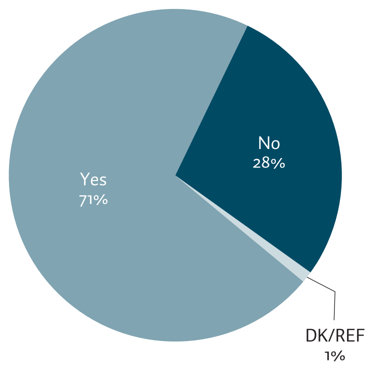
Survey respondents were posed two questions: one, which country did they think was the region's strongest economy now and, two, in ten years time. As was the case in the 2010 survey, Saudi Arabia (26%) is seen as the region's strongest economy currently with Turkey in second (20%).

Respondents from Saudi Arabia (7%), Syria (3%) and the Gulf countries (6%) were the least likely to identify Turkey as the region's strongest economy currently. However, more Tunisian respondents thought the Turkish economy was stronger than their own.

As was the case in the 2010 survey, a relative majority of respondents (25%) saw Turkey as the leading regional economy in 10 years. As can be seen in figure 23, Saudi Arabia was the second most frequent response (16%). Only 4% of respondents saw Egypt as the region's coming economic power.

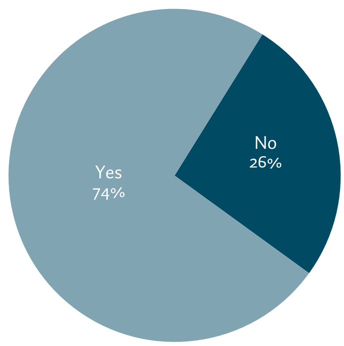
Iranian respondents were the most expectant of the Turkish economy; 36% felt Turkey would be the region's leading economic power in ten years. Again, Syrian respondents were the least likely to see Turkey as the region's economic leader in a decade (5%).

FIGURE 24: HAVE YOU EVER CONSUMED A TURKISH PRODUCT?



Turkish products are also knowingly consumed in the region; as can be seen in figure 24 71% of respondents had consumed a Turkish product.

FIGURE 25: HAVE YOU EVER WATCHED A TURKISH TV SERIES?



The popularity of Turkish soap operas has been a noted component of Turkey relations with the Middle East and they in turn have generated economic benefit of late. 74% of respondents had watched a Turkish TV series and among those that had most could name various shows and stars. Egyptian respondents were

FIGURE 26: TOP 5 HOLIDAY DESTINATIONS IN THE MIDDLE EAST

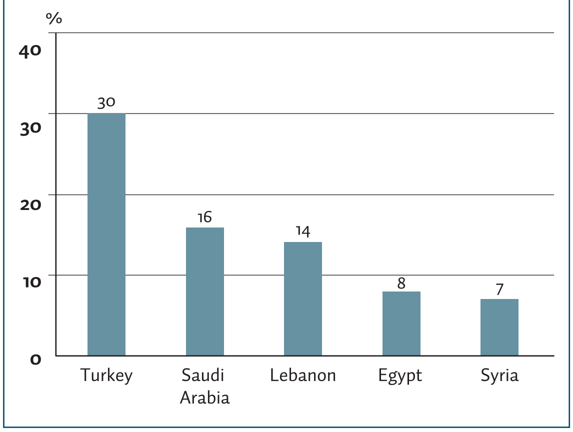
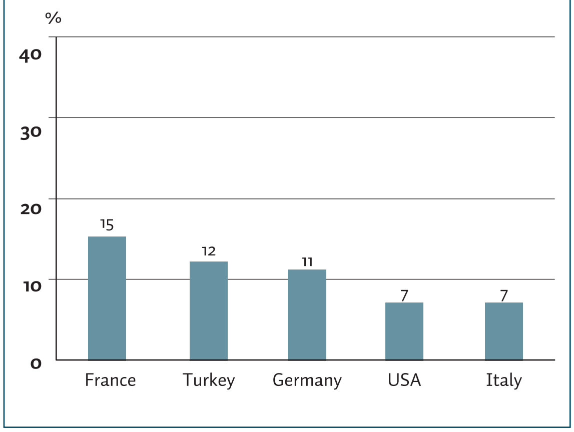


FIGURE 27: TOP 5 HOLIDAY DESTINATIONS OUTSIDE THE MIDDLE EAST



the least likely to have watched a Turkish TV series but even there 67% had knowingly watched one.

Turkey was also the most popular holiday destination in the region among respondents (30%), with Saudi Arabia (16%) and Lebanon (14%) following. Turkey was most popular as a destination among Iranian respondents (40%).

Asked for their destination of choice outside the region, the most popular was France (15%), followed by Turkey (12%) and Germany (11%).

Concluding Remarks

When we began this series of studies back in 2009, change in the perception of Turkey in the Middle East was often spoken of but little studied in detail. We assumed that changes in Turkey were followed in the region, the model question was discussed and that there was mutual interest in Turkey in the region.

However the results of the first survey and the level of regional interest shown in Turkey surpassed our expectations. With the results of the 2010 survey being similar, we started to see permanence to the perception of Turkey. 2011 only reinforced this. Turkey is a country that is appreciated by the people of the region and is considered a model.

As differences in some of the country results show, opinion of Turkey is also related to its policy and the ensuing dominant political discourse in the countries of the region. For two years the opinion of Syrians towards Turkey was the highest in the region, but the fact that it has fallen in 2011 is no coincidence.

Another issue that caught our attention was that Turkey's democracy was among the important reasons that made the country attractive in the region. In the eyes of the people of the region, it is its identity, democracy, conflict resolution orientated foreign policy and economic performance that make Turkey.

With this series we tried to take a regional picture of the perception of Turkey over the last three years and share it with the reader. We worked hard not to extrapolate the data and over analyse. Despite this, we would like to end with a warning. In the eyes of the people of the region, being successful does not necessarily mean you will be successful diplomatically. It should be noted that being popular in the region does not necessarily allow you to translate this popularity into power.

Methods in Detail

The Image of Turkey Survey in the Middle East is a cross-country survey conducted by the mixed-mode method including Computer Assisted Telephone Interviewing (CATI) and Face-to-Face Interviewing (F2F) by KA Research Limited of Istanbul. CATI was conducted in Egypt, Jordan, Lebanon, Palestine, Saudi Arabia, Syria, Iran, Tunisia, Oman, Bahrain, Qatar, Kuwait, UAE, Yemen and Libya by phone from a CATI facility in Istanbul, in Arabic and Farsi. F2F interviews were conducted in Iraq by KA Iraq office. A total sample of 2,323 participants was interviewed in 16 MENA countries.

Interviews were conducted among random sample individuals aged 18 and older in the major cities of the survey countries. Fieldwork took place between October 19th and December 15th, 2011. The questionnaire consisted of 48 substantive questions, 12 demographic questions, and 20 quality control questions. This poll has a +/- 2.03% margin of error at the 95% confidence interval at regional level, and maximum +/- 7.5% at country level.

14 MENA Countries (Egypt, Jordan, Lebanon, Palestine, Saudi Arabia, Syria, Tunisia, Oman, Bahrain, Qatar, Kuwait, UAE, Yemen and Libya): CATI fieldwork was realized by 40 trained interviewers who are native speakers of Arabic. The average length of a successful interview was 35 minutes; ranging from 16 minutes to 111 minutes. Households were selected by generating random numbers (last 4 digits) and respondents were selected using the Enumeration[6] method.

During the 14 country MENA fieldwork, there were 6,201 contact attempts made. Of these, 2,136 resulted in non-contacts, yielding a non-contact rate of 34.5%. Of the 3,509 successful contacts, there were 1,758 refusals giving the study a 49.9% response rate.

Iran: CATI fieldwork was realized by 15 trained interviewers who are native speakers of Farsi. The average length of a successful interview was 28 minutes; ranging from 13 minutes to 61 minutes. Households were selected by generating random numbers and respondents were selected using the Enumeration method.

Regarding the response rate in Iran, there were 969 contact attempts made. Of these, 517 resulted in non-contacts, yielding a non-contact rate of 53.4%. Of the 479 successful contacts, there were 193 refusals giving the study a 59.7% response rate.

Iraq: F2F interviews were conducted by 39 trained Iraqi interviewers. The average length of a successful interview was 41 minutes; ranging from 33 minutes to 59 minutes. Sampling points were selected by the P-Codes System (similar to postal codes). This system helped to cover all parts of the selected Primary Sampling Units (PSUs) and to have a randomization of sampling points. Then the households (in villages or streets) were selected according to the random routes principle and respondents within each household were selected using the Last Birthday method. There were

6 **In the enumeration method the respondent is asked the number of all 18+ people living in the household. Then, each 18+ person who is registered into the CATI system is given a number by the system. The CATI system generates a random number (for example 2) and the designated respondent is the person matching that number (the person listed in the second rank).**

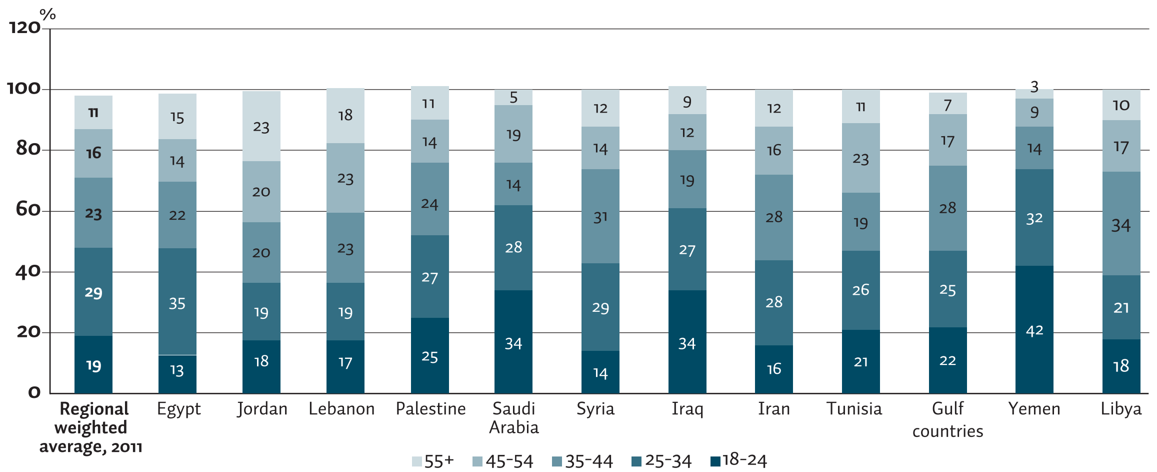
no substitutions for the respondent within the same household.

Regarding the response rate in Iraq, there were 358 contact attempts made. Of these, 14 resulted in non-contacts, yielding a non-contact rate of 3.9%. Of the 343 successful contacts, there were 57 refusals giving the study an 83.4% response rate.

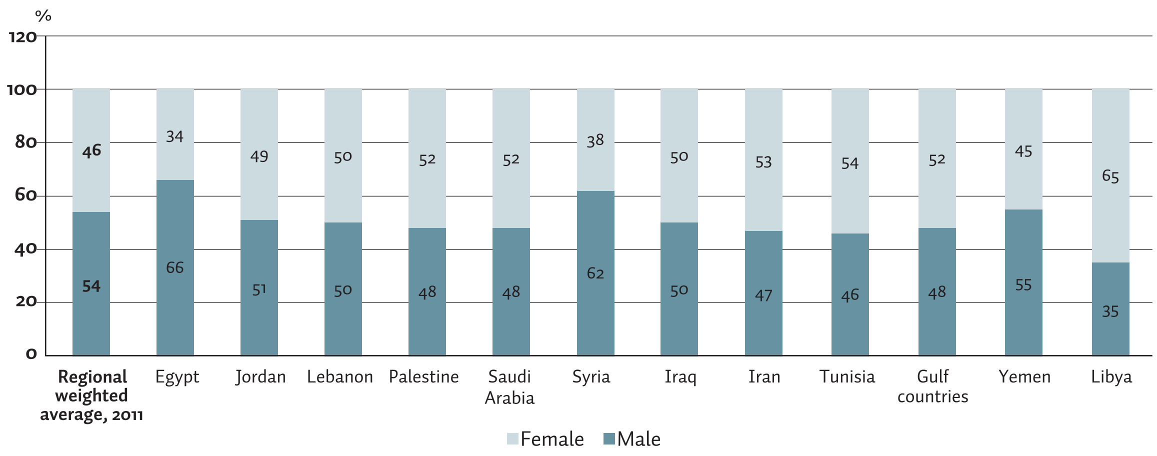
Country	Method	Fieldwork dates	Total population / 18+ population	Sampling cities	Sample size	Weighting factor
Egypt	CATI	October 19 –December 15, 2011	83,133,140 / 52,610,458	Cairo, Al Gizah, Alexandria, Ash Sharqiyah	153 adults aged 18+	3.99673
Jordan	CATI	October 19 –December 15, 2011	6,363,425 / 3,622,655	Amman, Irbid, Zarga, Balqa	246 adults aged 18+	0.17117
Lebanon	CATI	October 19 –December 15, 2011	4,311,450 / 3,042,929	Jabal Lubnān (Mount Lebanon), Beirut Bekaa,Al-Shamal (North)	208 adults aged 18+	0.17004
Palestine	CATI	October 19 –December 15, 2011	4,165,878 / 2,122,487	Nablus, Gaza, Jerusalem (Arabs only), Al-Khalil	284 adults aged 18+	0.08687
Saudi Arabia	CATI	October 19 –December 15, 2011	28,250,717 / 18,308,245	Aseer, Eastern Province, Makkah, Riyadh	159 adults aged 18+	1.33836
Syria	CATI	October 19 –December 15, 2011	29,906,756 / 12,013,123	Damascus, Aleppo, Homs, Hama	100 adults aged 18+	1.39631
Tunisia	CATI	October 19 –December 15, 2011	10,724,572 / 7,704,996	Tunis, Sfax, Sousse, Nabeul	206 adults aged 18+	0.43474
Yemen	CATI	October 19 –December 15, 2011	24,876,797 / 12,218,305	Al-Hudaydah, Hajjah, Sana'a, Ibb	100 adults aged 18+	1.42015
Libya	CATI	October 19 –December 15, 2011	6,464,263 / 4,171,491	Tripoli, Benghazi, Zawiya, Misrata	100 adults aged 18+	0.48486
Gulf Countries (Bahrain, Kuwait, UAE, Qatar, Oman)	CATI	October 19 –December 15, 2011	16,783,866 / 12,792,907	Manama, Kuwait City, Abu Dhabi, Doha, Muscat	195 adults aged 18+	0.39414 0.73614 2.44104 0.60696 0.30554
Iraq	F2F	October 30 – November 2, 2011	32,810,344 / 16,732,021	Baghdad, Erbil Basra, Anbar Nineveh, Thi-qar	286 adults aged 18+	0.68000
Iran	CATI	November 17-30, 2011	75,579,296 / 54,519,800	Tehran, Khorasan Rezavi, Esfahan, East Azerbaijan	286 adults aged 18+	2.21571

Demographics*

AGE DISTRIBUTION

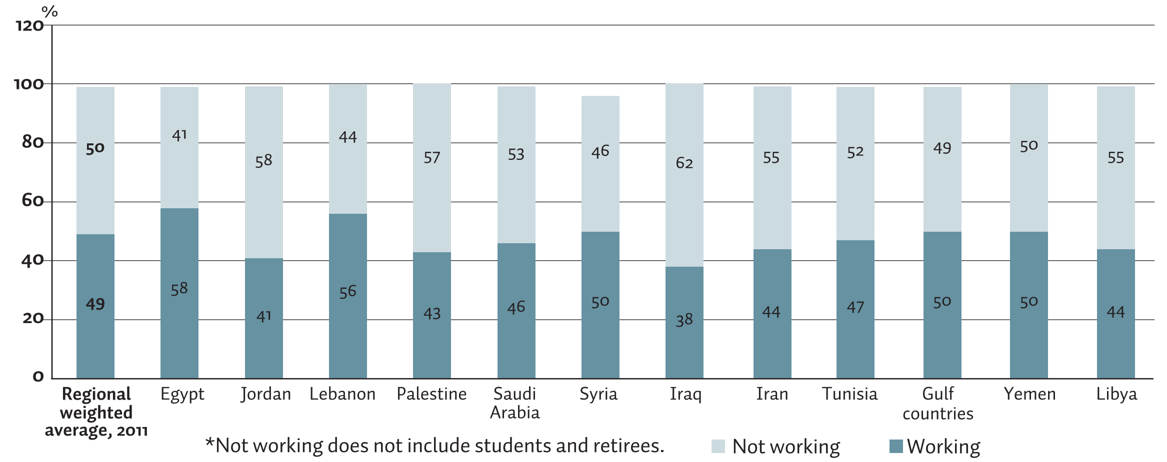


GENDER DISTRIBUTION



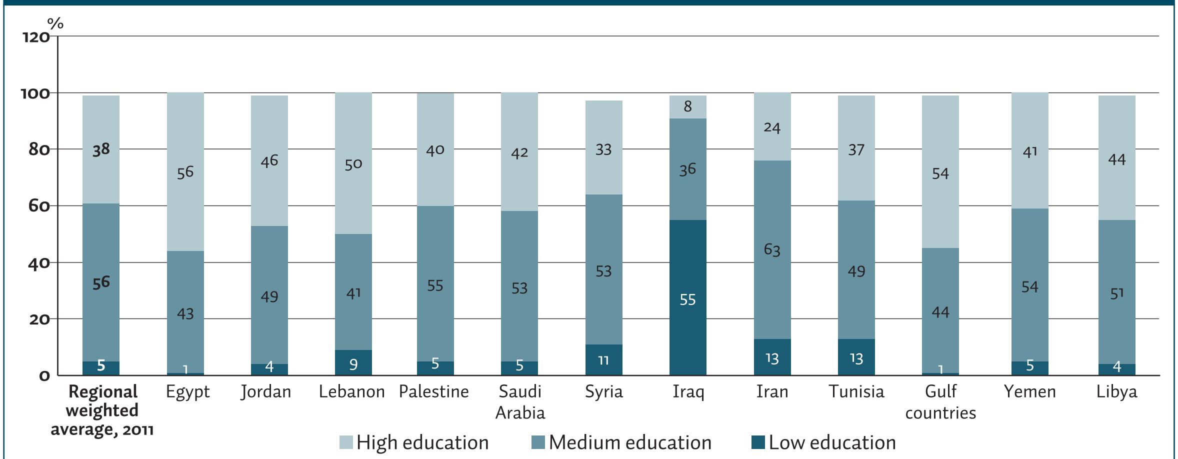
* Due to rounding not all percentages add up to 100%.

EMPLOYMENT STATUS

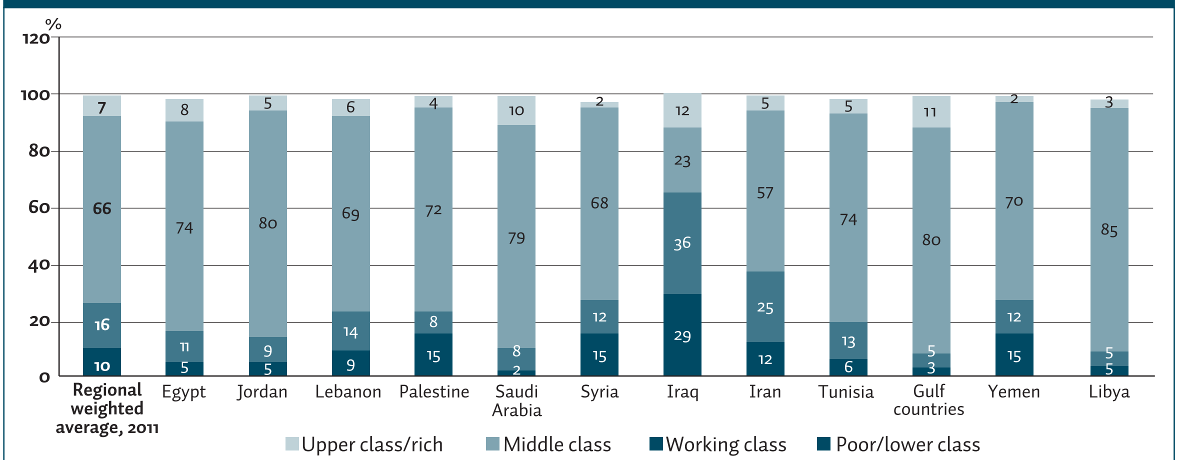


*Not working does not include students and retirees.

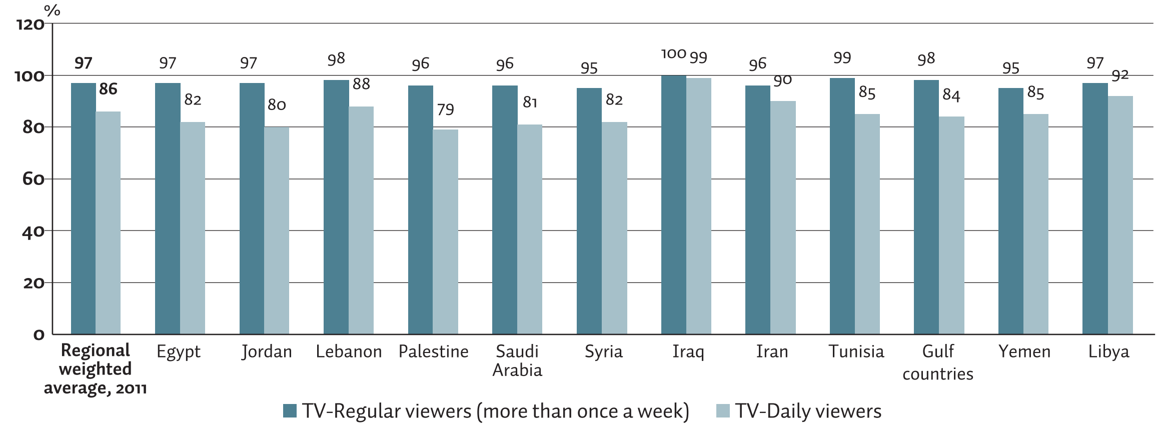
EDUCATION LEVEL



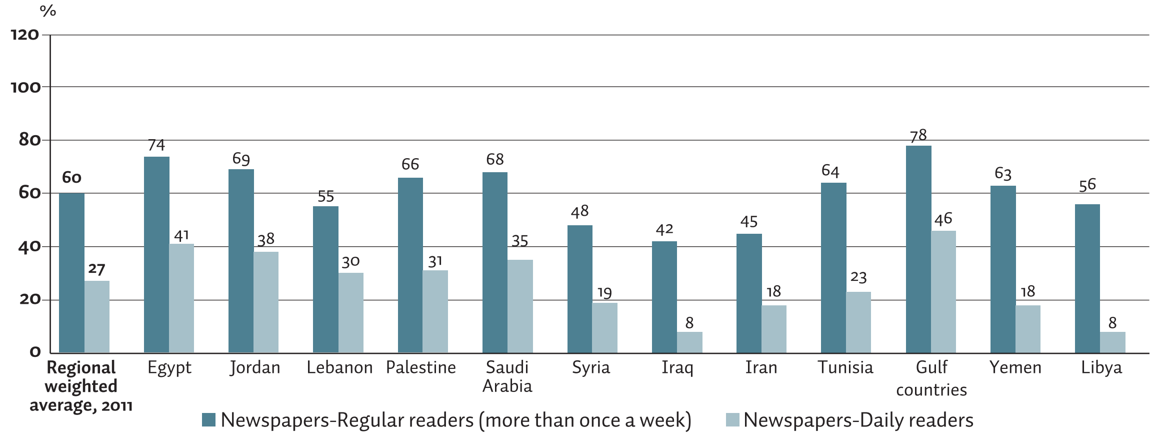
SOCIAL CLASS (BASED ON RESPONDENTS' CLAIM)



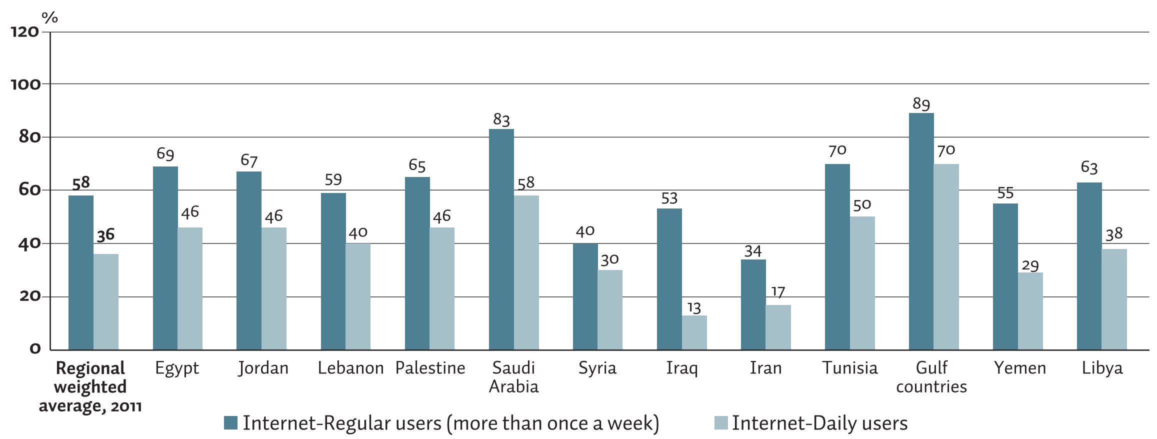
RESPONDENTS WHO WATCH TV



RESPONDENTS WHO READ NEWSPAPERS



RESPONDENTS WHO USE THE INTERNET



Notes

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