TESEV Foreign Policy Programme

The Perception of Turkey in the Middle East 2012

Mensur Akgün, Sabiha Senyücel Gündoğar

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Foreword

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

This report presents the findings of TESEV Foreign Policy Programme and KA Research's fourth Perception of Turkey in the Middle East research. The research sought the views of 2,800 people in 16 countries between August 3rd and 28th 2012 using telephone and face to face interviewing. As in previous years, it reveals striking results.

One of the most salient is that despite the turmoil in the region and reactions from Syria, Iran and Iraq, Turkey is still seen positively. 69% of respondents have a positive opinion of Turkey, making it the most popular among 18 countries in and outside the region. Turkey is followed by Egypt with 65%, while China is the most popular country outside the region with 57%. But, when compared to last year, Turkey has experienced a drop of 9 percentage points.

Another interesting point is that Turkey is perceived as the region's most powerful political power. Responses to this year's open-ended question about regional power show us that Turkey is perceived as the region's power from a political perspective, but not from a military or economic perspective. However, Turkey is seen as the region's leading economic power in 10 years.

70% of respondents think that the AK Party is a friend of their country. But as we suspected, the proportion of positive responses from Syria, Iraq and Iran are well below the average. Nevertheless, 64% support Turkey's response to recent events in the region. Respondents from Egypt, Libya and Palestine are the most supportive of Turkey's regional role.

But when asked about the Syria crisis, support for Turkey's response falls to 52%. And when thinking about the Arab Spring support falls to 42%. It's not just Turkey's Syria policy and its response to the changes in the region - also known as the Arab Spring - that have fallen; almost all areas have declined since last year.

For example, the proportion of those that think that Turkey's regional politics has become more influential of late fell by 9 percentage points to 61% this year. Whether Turkey is a model for the Middle East has witnessed a similar fate, falling from 61% last year to 53% this year. The proportion of those that think Turkey should play a greater role in the Middle East and North Africa has also fallen by 5 percentage points.

For the first time this year, we posed a question to find out whether people in the region think Turkey pursues a sectarian foreign policy. Although a rate of 28% might seem low, it differs from what Turkey claims it to be. And such a difference as well as the abovementioned drops warrants the attention of policymakers.

Although the core of this research relates to the perception of Turkey, there is data on regional politics, the changes it is undergoing and security concerns. There is a brief summary of the key findings on the following page, while fuller data can be found in the subsequent sections. As always, we hope that this short summary and subsequent study shed light on Turkey and world politics.

Key Findings

1. The region's future:
Hopeful but less so. 52% of survey participants feel more positive about the future of the region than they did 12 months ago – a decline on last year's finding (62%). Compared to 60% a year ago, only 47% think the Arab Spring has had a positive impact on the region this year.

2. Threat perception:
46% of respondents think that Israel is the biggest threat to the Middle East, followed by the US in second place with 21%. Iran is third with 11%.

3. Support for Iran's nuclear weapons programme:
support for an Iranian nuclear weapons programme continues at the same level as last year (37%) among the 16 countries. When looking at responses from Iran on their own, support has increased to 51%.

4. The most favourably thought of country: Turkey.
69% of respondents had a positive view of Turkey in 2012 making it the most popular but this is a drop on last year's results when 78% had a favourable opinion of Turkey. This year, Turkey is followed by Egypt (65%) and the UAE (62%).

5. Turkey's role in the Middle East is supported.
64% of respondents think Turkey should play a bigger role in the region. Although this is down from last year, respondents from all countries bar Syria support Turkey's role. Support in Syria was just 39%.

6. Turkey is a regional political power.
Asked for the first time this year, Turkey is seen as the region's foremost political power. Saudi Arabia is the region's economic and cultural power and Iran is the region's premier military power.

7. Turkey is a model, but not as popular as it once was.
53% of participants felt that Turkey is a model for the region but down from 61% last year. The 'Turkish model' found most support in Libya, Tunisia, Palestine and Egypt but little support in Iran and Syria. Those that see Turkey as a model identify its economic performance (31%), democratic regime and secular system (both 21%) as its attractive qualities.

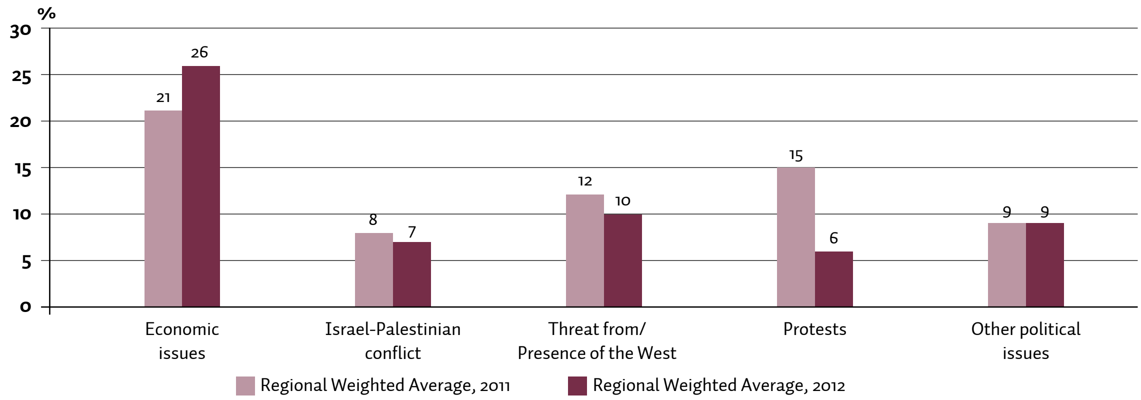
8. The future of Syria.
32% of respondents expect stability to return to Syria, while 28% believe that Assad will be overthrown. 52% view Turkey's response to the crisis positively.

9. Sectarian foreign policy:
Asked for the first time this year, 28% of respondents think Turkey's foreign policy is sectarian. 62% think Iraqi foreign politics is sectarian, while 55% think Iran's is, 53% think Syria's is, 37% think Saudi Arabia's is and 30% think Egypt's is.

10. The Region's future economic leader: Turkey.
Saudi Arabia is seen as the region's strongest economy now but Turkey is expected to be the leader in a decade's time. 21% of participants think Turkey will be the region's strongest economy, whereas 16% think it will be Saudi Arabia and 7% believe it will be the UAE.

Section 1: Regional Overview

FIGURE 1: THE MOST URGENT ISSUE FACING THE REGION



The results of the 2012 Perception of Turkey in the Middle East survey demonstrate that the economy is the region's most important concern. 26% of participants in the 16 countries surveyed identify economic issues[1] as the region's most urgent issue. This represents a 5 percentage point increase on the previous year's results. As can be seen in figure 1, economy also ranked first in 2011.

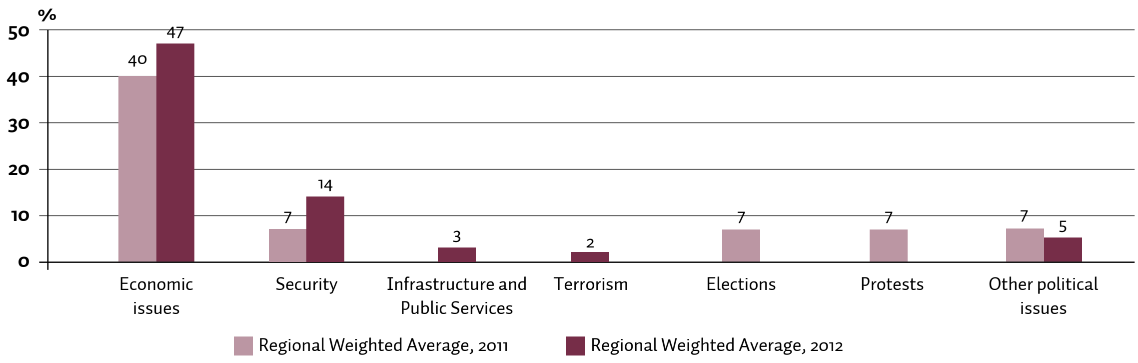
10% of survey respondents identify the threat from the West or Western presence, making it one of the region's most urgent issues. In Iraq, 26% of participants identify the threat from the West or Western presence in the region as the region's most urgent issue in 2011 but only 10% do so this year. This year, 16% of Iraqi participants identify other political issues as the region's most urgent issue. The completion of the withdrawal of US troops in December 2011 and other domestic political events may have had a role in this change.

The Israeli-Palestinian conflict ranks third (7%). When compared to the 2011 survey, there has been a large decline in the number of respondents that identify popular protests as the region's most urgent issue. In 2011, popular protests ranked second among concerns with 15% of responses but now rank fourth with just 6%. Although transitions and, in some countries civil strife continues, more traditional responses have become prominent again in the region this year.

When looking at in-country responses, the fact that 8% of Iraqi respondents identify the relations between different ethnic and religious groups as the region's most urgent issue is a noteworthy finding. The Syria crisis finds credence among participants in Saudi Arabia, the Gulf countries and Libya, but by no more than 5%. Respondents in Tunisia (16%), Jordan and Egypt (both 13%) identify the Israeli-Palestinian conflict as the region's most urgent issue.

1 **Economic issues include poverty, standard of living, unemployment and other economy-related concerns.**

FIGURE 2: THE MOST URGENT ISSUE FACING THE RESPONDENT'S COUNTRY



The economy also ranks as the most urgent issue facing the respondents' own country – as opposed to the region. 47% of respondents identify economic issues as their country's most urgent issue, an increase of 7% on 2011. As in 2011, security ranks second in 2012 but this time doubles its share with an increase of 7 percentage points. While elections and popular protests ranked highly in 2011, they do not rank among the most urgent issues in the 2012 survey.

When looking at in-country responses, in all countries bar Libya and Egypt economic issues are foremost in respondents' minds. In Iran, economic issues are particularly prominent. 82% of Iranian respondents identify economic issues as their country's most urgent issue up from 70% in 2011.

In Egypt, 34% of respondents identify security as the country's primary concern, whereas 30% identify economic issues. The situation is similar in Libya. 38% of respondents identify security as the most urgent issue facing the country, with economic issues occupying second place with 17% of responses.

The survey also highlights people's security concerns in Syria and Iraq. While 18% of Syrian respondents identify economic issues as their primary concern, 16% identify security and a further 16% identify terrorism as the most urgent issue facing the country. If these two responses are to be combined, general security issues would gain more prominence in the rankings.

A similar picture emerges in Iraq. Economic issues rank first among concerns with 22% of responses but security follows with 15%. Unique to Iraq, street crime garners 12% of responses ranking it among the most urgent issues in the country. If the 5% of respondents who identify terrorism as the country's most urgent issue are added to the two previous results, it would not be incorrect to say that security-related issues are as important as economic concerns.

FIGURE 3: WHAT IS YOUR OPINION OF THE FOLLOWING COUNTRIES?

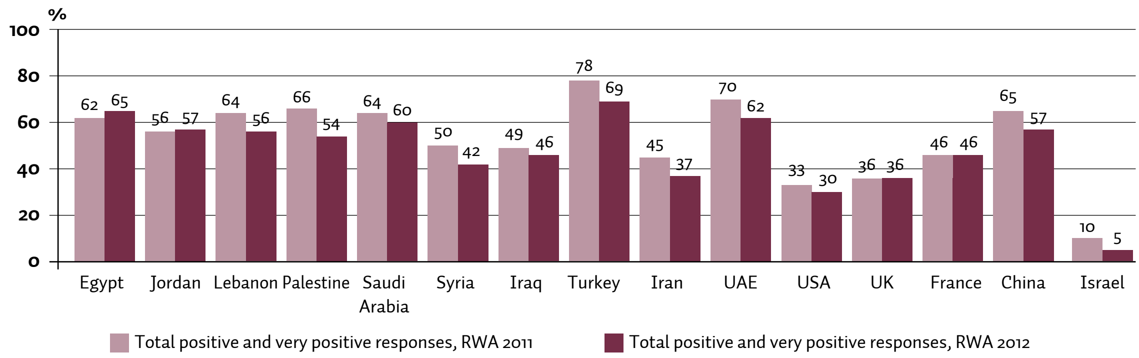


Figure 3 details responses to the question "what do you think about the following countries?" Respondents were asked to comment on their opinion of 18 countries[2]. As in 2011, Turkey is viewed most favourably of all countries for which opinion was sought with 69% of respondents having a somewhat or very favourable view of the country in 2012. After Turkey, Egypt (65%), the UAE (62%) and Saudi Arabia (60%) are viewed the most favourably.

Despite being seen as the most favourable country in 2012, Turkey is less popular than it was in 2011. Favourable opinion of Turkey fell 9 percentage points from 78% in 2011 to 69% in 2012. Indeed, apart from a slight increase in Egypt and Jordan, no country is viewed more favourable this year than it was in 2011.

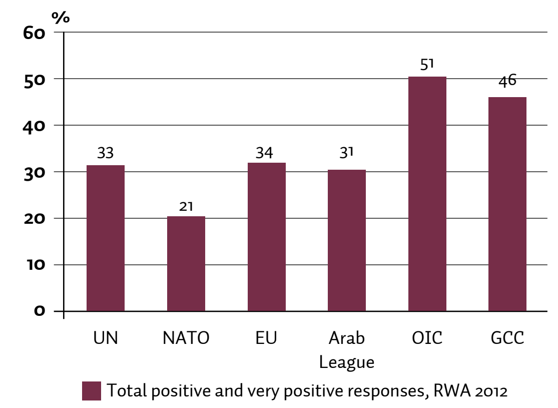
Outside of the region, the UK and France maintain their levels of favourability, whereas there is a drop for other countries. China registered a significant drop from 65% to 57%. Israel remains the least popular country, the proportion of respondents who view it favourable also fell from 10% to 5%. Following Israel, the US (30%), UK (36%) and Iran (37%) are viewed the least favourably of the 18 countries.

When looking at positive opinion of Turkey over the last four years in the seven countries that the survey has been carried out in each year[3], over 70% of respondents had a very or somewhat favourable opinion of Turkey throughout. Starting from 75% in 2009, favourable opinion (as a seven country weighted average) peaked in 2010 (82%), before declining slightly in 2011 (80%) to 71% in 2012. While favourable opinion has declined over the last two years, perception of Turkey is still largely positive.

2 **The three countries not detailed in figure 3 are Qatar (56%), Russia (42%) and Germany (48%).**

3 **These seven countries are Egypt, Jordan, Lebanon, Palestine, Saudi Arabia, Syria and Iraq. We use a seven country weighted average here to ensure any comparison is fair. As can be seen, there is a discrepancy between the 16 country and 7 country weighted averages.**

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



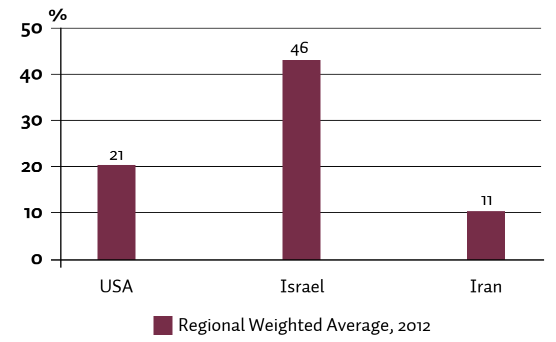
Respondents were asked for their opinion of the international organisations detailed in figure 4. Of the 6 organisations, opinion of the Organisation of Islamic Cooperation (OIC) is most favourable (51%), with the Gulf Cooperation Council (GCC) second (46%). Interestingly, favourable opinion of the Arab League is below that of the United Nations (UN) and European Union (EU) – only 31% of respondents have a very or somewhat favourable opinion of the organisation. NATO is the least popular organisation with 21% very or somewhat favourable responses.

Compared to the 2011 results, favourable opinion of the GCC and OIC has increased by 5 and 2 percentage points respectively. On the other hand, the Arab League registered an 8 percentage point decrease. Only a majority of Iranian respondents have a positive view of the Arab League this year (54%).

When looking at in-country results, Libyan respondents have the most positive view of NATO (69%), the UN (55%) and the EU (67%). In all other countries, favourable opinion of all three organisations is below 50%. The most negative respondents are from Syria, where the OIC is the most positively viewed but with only 20%.

REGIONAL SECURITY

FIGURE 5: WHICH COUNTRY POSES THE GREATEST THREAT TO THE REGION?



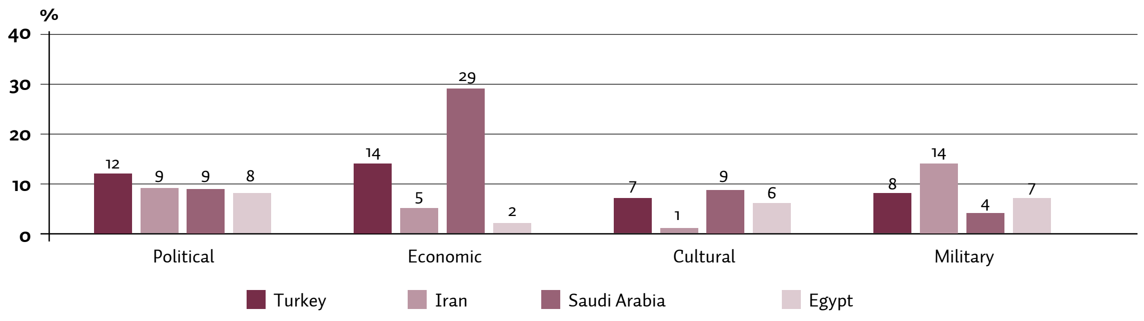
Threat perception has not changed in the Middle East (figure 5). 46% of participants again identify Israel as the region's biggest threat, followed by the USA (21%) and Iran (11%). The perception of Israel as the region's greatest threat is most common in Libya (66%), Egypt (63%), Syria (60%) and Tunisia (57%) and least common in Iraq (21%).

Only in Iraq and Iran do respondents rank the USA as a greater threat to the region than Israel. 44% of Iranian respondents identify the US as the greatest threat to the region, with Israel garnering 34%. These figures narrow in Iraq; the US occupies first place with 24% of responses to Iran's 22% and Israel's 21% .

After Iraqi and Iranian respondents, Palestinians are the most likely to identify the US as the greatest threat (17%), followed by respondents from Lebanon and the Gulf countries (both 14%). The US was least likely to be seen as a threat in Saudi Arabia (5%) and Libya (7%).

When it comes to seeing Iran as a threat, more Saudi Arabians do so than any other country with 34% of in-country responses. Respondents from Iraq and Yemen follow Saudi Arabians in second spot (both with 22%), while a not inconsiderable 19% of Gulf respondents also identify Iran as the biggest threat. On the other hand, only 5% of Syrian and Tunisian respondents identify Iran as the region's biggest threat.

FIGURE 6: REGIONAL POWER



For the first time, we tried to understand perceptions of regional power this year. As can be seen in figure 6, respondents were asked to identify which country they thought was the region's foremost power in each of four areas: political, economic, cultural and military. The questions were asked in an open-ended fashion, four countries came to the fore: Turkey, Iran, Saudi Arabia and Egypt.

12% of respondents point towards Turkey as the region's foremost political power, followed closely by Iran (9%), Saudi Arabia (9%) and Egypt (8%). Respondents identify Saudi Arabia as the region's foremost economic power (29%), with Turkey occupying second place (14%). In economic terms, Iranian and Egyptian power lag behind Saudi Arabia and Turkey. Culturally speaking, the order among the four countries remains the same, although Egypt comes slightly to the fore.

However, 14% of respondents identify Iran as the region's foremost military power ahead of Turkey (8%) and Egypt (7%). Although not shown in figure 6, it should be noted that 4% of respondents identify Israel as the region's foremost military power.

Again for the first time in 2012, we asked respondents whether they thought eight countries' foreign policies had sectarian roots. As can be seen in figure 7, Iraq's foreign policy is seen as the most sectarian – 62% of respondents think it is sectarian in nature. Iraq is followed by Iran (55%) and Syria (53%), while 37% think that Saudi Arabia's foreign policy is sectarian. Respondents' perceptions of Turkey's, Qatar's and Egypt's foreign policy seem quite similar.

FIGURE 7: DO THE FOLLOWING COUNTRIES PURSUE SECTERIAN FOREIGN POLICY?

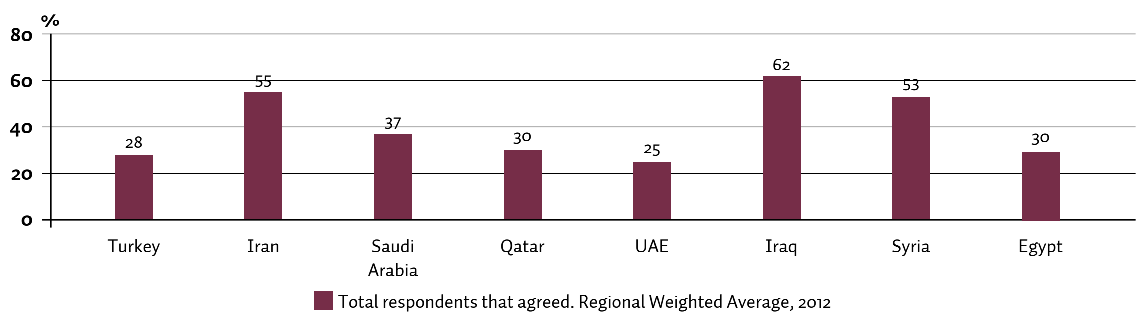
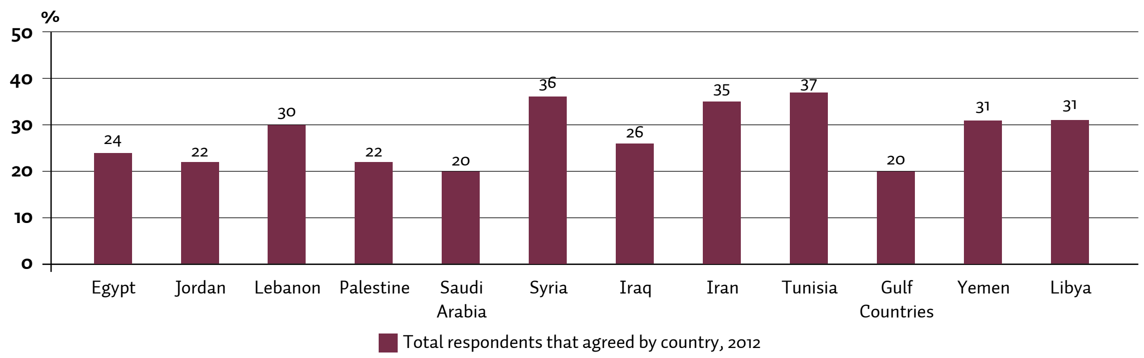


FIGURE 8: DOES TURKEY PURSUE SECTERIAN FOREIGN POLICY? COUNTRY-BY-COUNTRY RESPONSES

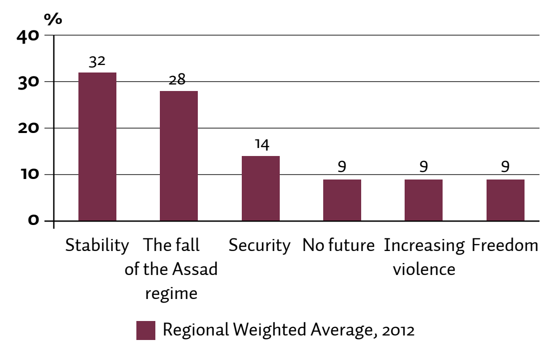


28% of participants think that Turkey's foreign policy is sectarian in its roots, 30% think that Egypt's and Qatar's foreign policy is sectarian, whereas 25% think that the UAE's is. Although Turkey's 28% might seem quite low, comparatively speaking the perception is quite significant.

When looking at particular countries' perceptions of Turkey's foreign policy and sectarianism, perception fluctuates between 20% and 37%. As can be seen in figure 8, Tunisian (37%), Syrian (36%) and Iranian (35%) respondent are the most likely to identify Turkey's foreign policy as sectarian. Respondents from Saudi Arabia, the Gulf countries, Palestine and Jordan are the least likely to view Turkey's foreign policy as sectarian.

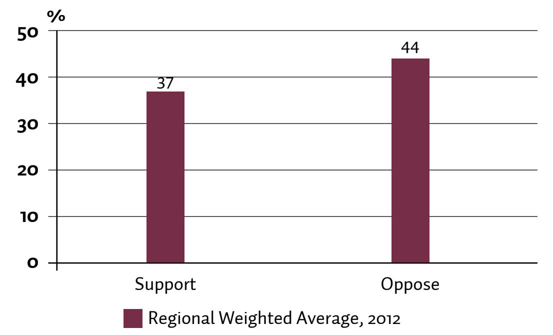
In all countries bar Syria, Iraq and Iran, more than 50% of respondents think Iraq and Iran pursue foreign policy based on sectarian lines.

FIGURE 9: EXPECTATIONS FOR THE FUTURE OF SYRIA



We also asked respondents about their perception of the future of Syria this year. The most common responses among survey respondents include stability (32%), the fall of the Assad regime (28%) and security (14%). 9% of respondents see no future for Syria, expect an increase in violence and wish to have more freedom. Indeed, as figure 9 demonstrates, respondents prioritise security and stability for the Syrians.

FIGURE 10: REGIONAL SUPPORT FOR AN IRANIAN NUCLEAR WEAPONS PROGRAMME



The last two questions in this section relate to perception of Iran's nuclear weapons programme. 37% of respondents support a nuclear weapons programme – almost identical to the level of support in 2011. 44% of respondents are against an Iranian nuclear weapons programme. Opposition is most common in Saudi Arabia (70%), followed by Iraq (61%) and the Gulf countries (53%).

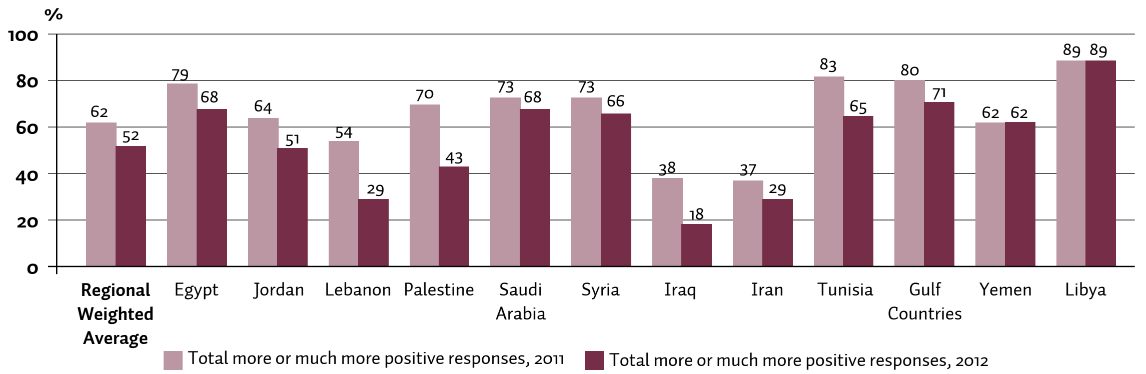
51% of Iranian respondents support a national nuclear weapons programme, while 9% are undecided and 35% are against. Outside of Iran, Egyptian respondents are most supportive of a nuclear weapons programme (43%) this year compared to Syrian respondents last year (52%). This year 37% of Syrians support a nuclear weapons programme.

Those that support an Iranian nuclear weapons programme were asked to identify why they did. As can be seen in figure 11, the most common response is to ensure Iran's own security (26%), followed by it is Iran's right to (20%) and to confront Israel (16%). When looking at Iranian responses to the question, only 3% of respondents think that the country should develop nuclear weapons to confront Israel – Iran has the right to develop them and to ensure its own security are the most common responses.

FIGURE 11: WHY DO YOU SUPPORT AN IRANIAN NUCLEAR WEAPONS PROGRAMME?

Section 2:
A Region in Transition

FIGURE 12: GIVEN RECENT EVENTS IN THE MIDDLE EAST AND NORTH AFRICA, DO YOU FEEL MORE OR LESS POSITIVE ABOUT THE FUTURE? COUNTRY-BY-COUNTRY RESPONSES



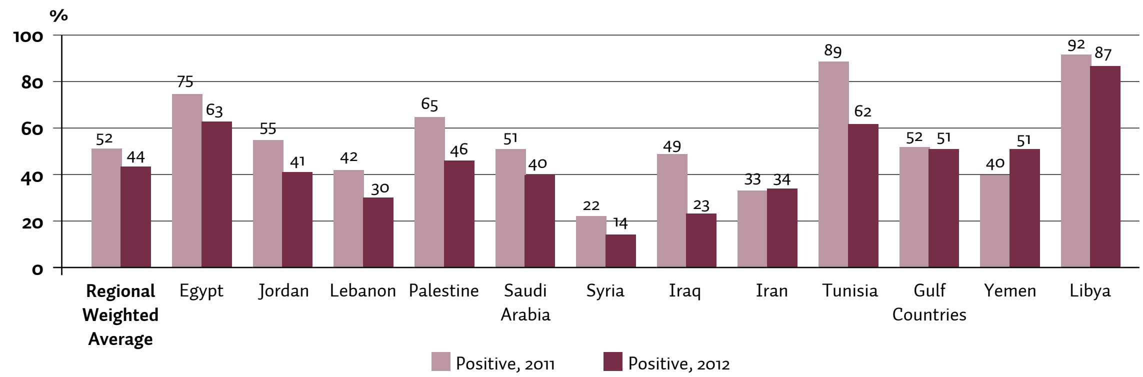
This section details respondents' perceptions of the historic transformation in the region, including questions relating to their expectations for the future. As can be seen in figure 12, 52% of respondents feel more positive about the future than they did 12 months ago. Despite more than half feeling more hopeful, this is a 10 percentage point drop on last year's findings.

Indeed, in all countries bar Libya and Yemen, respondents feel less hopeful than they did 12 months ago. In Libya and Yemen no change in perception has taken place. Libyan respondents are the most positive in the region, with 89% saying they feel more positive about the future than they did 12 months ago. After Libya, the Gulf countries seem to be the most hopeful (71%) - although there has been a slight decline - followed by respondents from Egypt and Saudi Arabian (both 68%).

A particular striking finding this year is that 66% of Syrian respondents feel more positive about the future than they did 12 months ago. Given the dramatic events occurring in the country, the sense of hopefulness is noteworthy.

The least hopeful of all respondents are from Iraq, where only 18% have a more positive view of the future than they did 12 months ago. This is a significant drop from 38% the year before, which was already a low starting point. Following Iraqis, Lebanese and Iranian respondents are the least hopeful. Only 29% of respondents in both countries feel more positive about the future than they did 12 months ago. In Lebanon in particular, there has been a marked drop in perception from 54% last year to 29% this year. Palestinian respondents have also become far less hopeful. 43% are more hopeful than they were 12 months ago compared to 70% in the 2011 survey.

FIGURE 13: THE EFFECT OF THE ARAB SPRING ON THE RESPONDENT'S COUNTRY, COUNTRY-BY-COUNTRY RESPONSES



Perception of the effect of the Arab Spring was also garnered. Figure 13 details respondents' perception of the effect of the Arab Spring on their own country. The first point of note is that the Arab spring is losing its verve among people in the region. In 2011, 52% of respondents thought that the Arab Spring had had a positive effect on their country, compared to just 44% this year. Although not drastic, the decline is indicative.

Libyan respondents remain the most positive: 87% believe that the Arab Spring has had a positive impact on Libya. Libya is followed by Egypt (63%) and Tunisia (62%), although there has been a significant drop in positive opinion in the latter from 89% last year to 62% this year. In addition to these countries, a majority of Gulf and Yemeni respondents have a positive view of the impact of the Arab Spring (both 51%). Interestingly, Yemen is the only country in which positive opinion has actually increased this year.

The most negative respondents hail from Syria, where only 14% believe that the Arab Spring has had a positive impact on their country. Iraqi (23%), Lebanese (30%) and Iranian (34%) respondents are not particularly positive either.

We repeated the same question but with emphasis on the region (Figure 14). Similar results ensued. 47% of respondents believe the Arab Spring has had a positive impact on the region, while 29% think it has not and 10% remain undecided.

FIGURE 14: THE EFFECT OF THE ARAB SPRING ON THE REGION COUNTRY-BY-COUNTRY RESPONSES

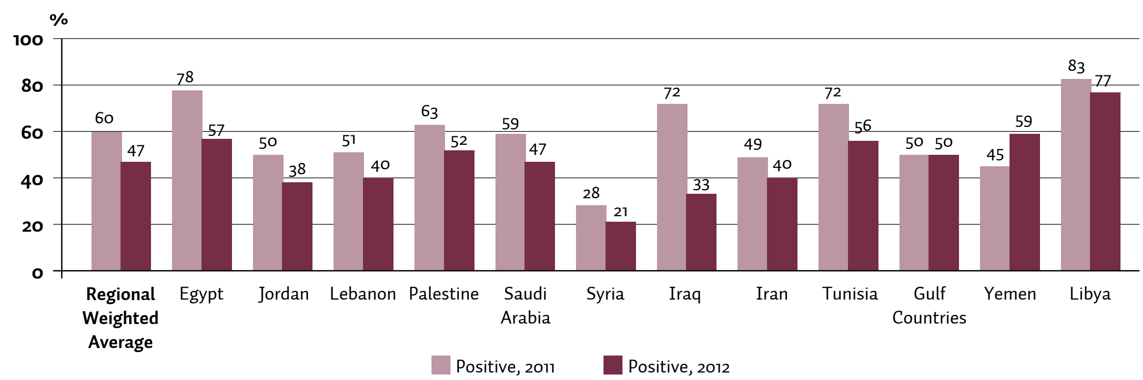
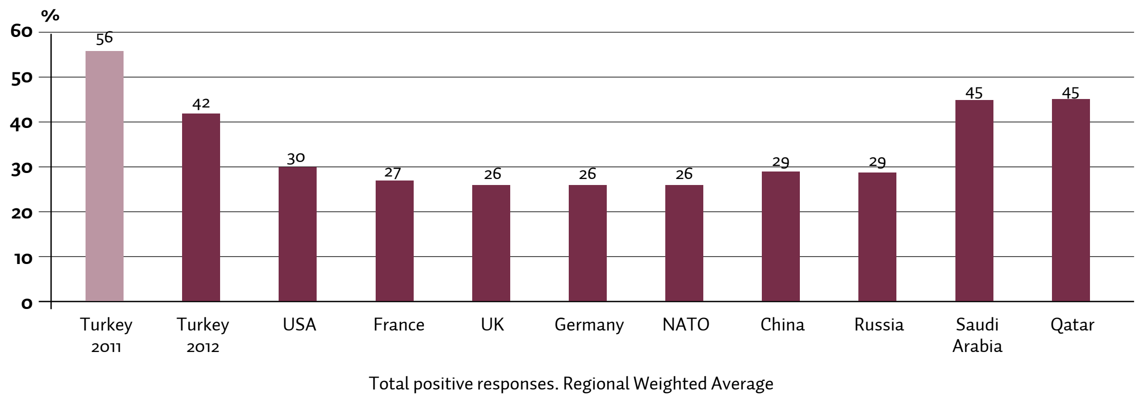


FIGURE 15: DO YOU THINK THE FOLLOWING COUNTRIES HAVE HAD A POSITIVE OR NEGATIVE EFFECT ON THE ARAB SPRING?



As shown in figure 14, this year's overall finding of 47% is lower than the 2011 figure: positive opinion of the impact of the Arab Spring on the region has dropped 13 points from 60% last year. Bar Yemen and the Gulf countries, respondents' view of the impact of the Arab Spring on the region is less positive than last year. As shown in figure 14, while opinion in the Gulf countries stayed the same, Yemeni respondents have a far more positive opinion of the impact of the Arab Spring on the region than they did last year. Country-by-country decrease can be seen in figure 14.

The most conspicuous decline is in Iraq. In 2011, 72% of Iraqis thought that the Arab Spring had had a positive impact on the region compared to just 33% this year. Again, the least positive respondents hail from Syria, where only 21% think the Arab Spring has had a positive impact on the region.

As can be seen is figure 15, according to the results of the 2012 survey, Qatar and Saudi Arabia have had the most positive impact on the Arab Spring. For both countries, 45% of respondents think they have had a positive impact.

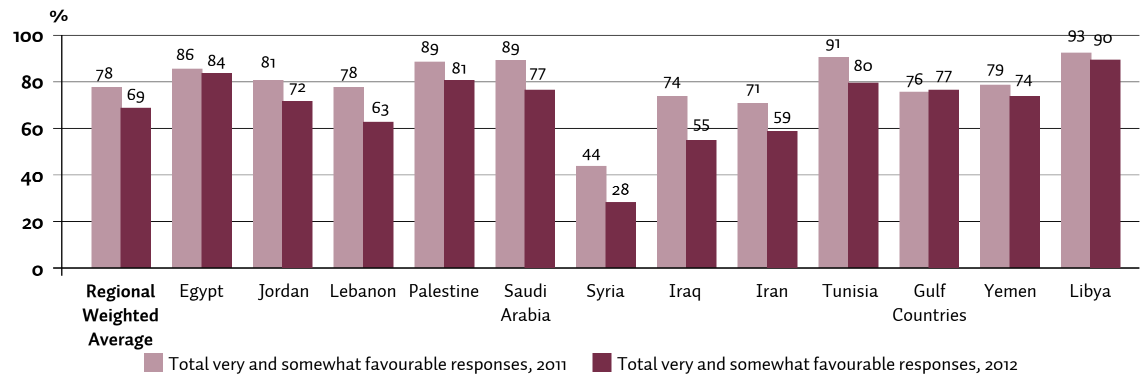
42% of the respondents think Turkey had a positive impact on the Arab Spring. It should be noted that when compared to the 2011 results, those that thought Turkey had a positive impact has fallen by 14 percentage points.

77% of Libyan respondents think Turkey has had a positive role, making them the most supportive. Respondents from Iraq (59%), Yemen (57%), Tunisia, Palestine (both 55%) and Egypt (50%) also look upon Turkey's impact on the Arab Spring in a positive fashion. However, in all of these countries there has been a slight decline in positive perception over the last year. Again, Syrian and Iranian respondents are the least positive of Turkey's role. Only 14% of Syrian respondents and 26% of Iranian respondents think Turkey has had a positive effect on the Arab Spring.

When looking at other actors' effect on the Arab Spring, positive perception is very low. The UK, Germany and NATO are the least positively viewed actors.

Section 3:
Turkey and the Middle East

FIGURE 16: FAVOURABLE OPINION OF TURKEY COUNTRY-BY-COUNTRY RESPONSES



The Perception of Turkey in the Middle East survey asked respondents a number of questions to understand how they perceive various actors in and outside the region. One of which, aimed to gauge opinion of 18[4] countries. In the first section, figure 3 details respondents' perception of Turkey and a range of other actors.

As noted in section 1 (and detailed on the left of figure 16), 69% of respondent's have a positive view of Turkey; generally the region has a positive view of Turkey. Although Turkey remains the most popularly ranked country in the region among 18 countries, positive perception has decreased over the course of the last year from 78% to 69%.

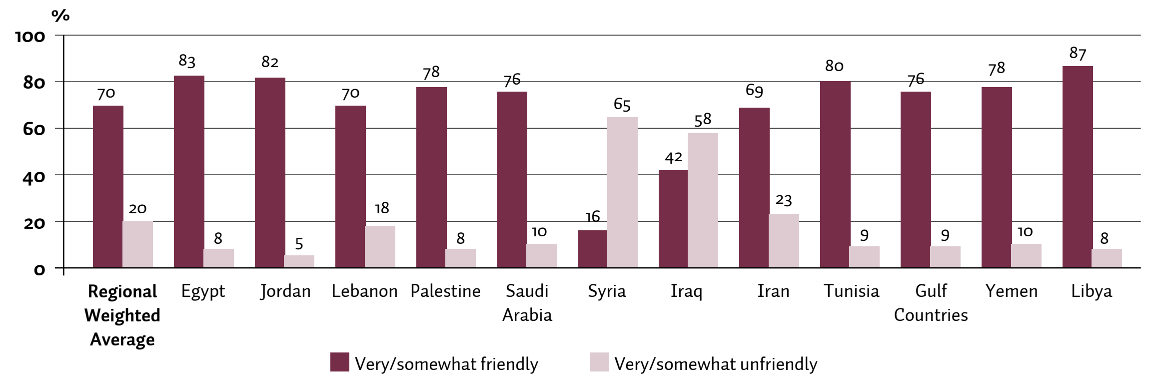
Figure 16 takes this data and focuses on respondents' perception of Turkey. When we analyse responses from each country, Libyan respondents have the most positive view of Turkey (90%) – as was the case in 2011. Likewise, Egyptian perception of Turkey has not changed drastically; a high proportion of respondents from Egypt (84%) have a positive perception of Turkey, although very slightly lower than last year. Palestinian respondents are the third most positive with 81% having a favourable view of Turkey.

A high proportion of respondents from Tunisia (80%) again have a positive view of Turkey, whereas respondents from Jordan, Saudi Arabia, the Gulf and Yemen all hover above the 70% mark. It is important to note that although perception of Turkey remains high, in all of these countries bar the Gulf positive perception has actually fallen slightly over the course of the last year.

Positive responses from Lebanon, Iraq and Iran have fallen more significantly. Favourable opinion of Turkey has fallen from 78% to 63% in Lebanon and from 74% to 55% in Iraq. If we look at Iraqi opinion, it has returned to 2010 levels (again 55%) having risen to 74% in 2011. Iranian opinion of Turkey has continued to fall from 85% in 2010, to 71% in 2011 and then again to 59% this year. As such, it is possible that Turkey's

4 **Please check footnote 2.**

FIGURE 17: IS THE GOVERNMENT OF TURKEY A FRIEND OF YOUR COUNTRY? COUNTRY-BY-COUNTRY RESPONSES



perceived stance on regional events and developments in bilateral relations have impacted on the perception of Turkey in Iran. Syrian perception has experienced an even more dramatic decline. Favourable opinion of Turkey peaked at 93% in 2010, but dropped significantly to 44% in 2011 and drop as low as to 28% in 2012.

The data detailed in figure 17 supports figure 16. Region-wide, 70% of respondents believe that the government of Turkey is a friend of their country. Again, Libyans return the highest number of positive responses (87%), with 80% or more of respondents from Egypt, Jordan and Tunisia believing that the government of Turkey is a friend.

Two countries think that the government of Turkey is not a friend: Syria and Iraq. 65% of Syrian respondents and 58% of Iraqi respondents believe that the government of Turkey is unfriendly to their country.

The average positive regional response to the same question last year was 80%. Likewise, respondents from Iraq and Syria felt that the government of Turkey was hostile to their country. In 2011, almost identical number of Iraqis (56%) but fewer (52%) Syrians thought that the government of Turkey was not a friend.

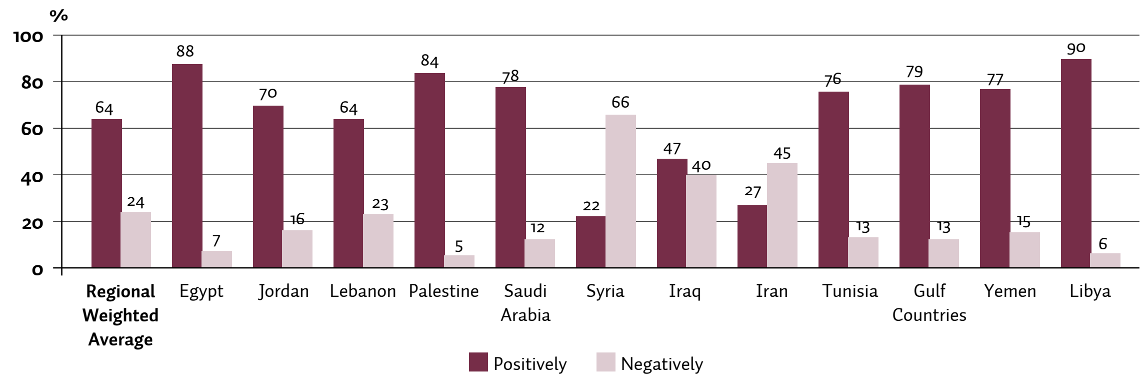
Region-wide, respondents think China is just as likely as Turkey to be a friendly country. 70% of respondents think that China is a friend to their country, while 57% think Russia is friendly. NATO and the US are seen as the most hostile or unfriendly actors. Only 33% of respondents think that NATO has friendly relations with their country, with the US recording 44%, EU 51% and UN 55%.

In order to better understand perceptions of Turkey's politics towards the changes in the region, we added a further question to this year's survey. 48% of respondents say that they follow Turkey's Middle East politics, of which 64% approve of its approach, 24% disapprove and 10% are undecided[5].

Figure 18 details the responses from each country. According to the results, respondents from Libya, Egypt and Palestine look very favourably on Turkey's response to events in the region (90%, 88% and 84% respectively). Positive views of Turkey's response are also quite high in Jordan, Saudi Arabia, Tunisia, Yemen and the Gulf countries, while 64% of Lebanese respondents do so too. More Iraqi respondents look positively on Turkey's response than negatively, but only just (47% to 40%).

5 **2% of respondents refused or did not answer the question.**

FIGURE 18: HOW WOULD YOU EVALUATE TURKEY'S RESPONSE TO THE EVENTS IN THE MIDDLE EAST? COUNTRY-BY-COUNTRY RESPONSES



A majority of Syrians view Turkey's response in a negative fashion (66%), while 45% of Iranian respondents also view Turkey's response negatively.

Following on from the previous questions, we also wanted to ascertain respondents' thoughts on Turkey's Syria policy. 58% of respondents from all 16 countries say they follow Turkey's response to the Syria crisis – a higher figure than those who say they follow Turkey's Middle Eastern politics. Of those that said they followed Turkey's response to the Syria crisis, 52% see it in a positive fashion while 36% consider it negative.

As with a number of other cases, Turkey receives most support from respondents in Libya (82%). Looking at figure 19, more than half of respondents in all countries bar Iran, Iraq and Syria think Turkey's response is a positive one. Iraqi responses are split 45-45%, while 60% of Iranian respondents and 69% of Syrian respondents perceive Turkey's response negatively.

Generally speaking, Turkey's policies towards Syria are not seen as a problematic issue by most respondents in the region, but certain countries – perhaps unsurprisingly – are not so ambivalent.

FIGURE 19: HOW WOULD YOU EVALUATE TURKEY'S RESPONSE TO THE SYRIA CRISIS? COUNTRY-BY-COUNTRY RESPONSES

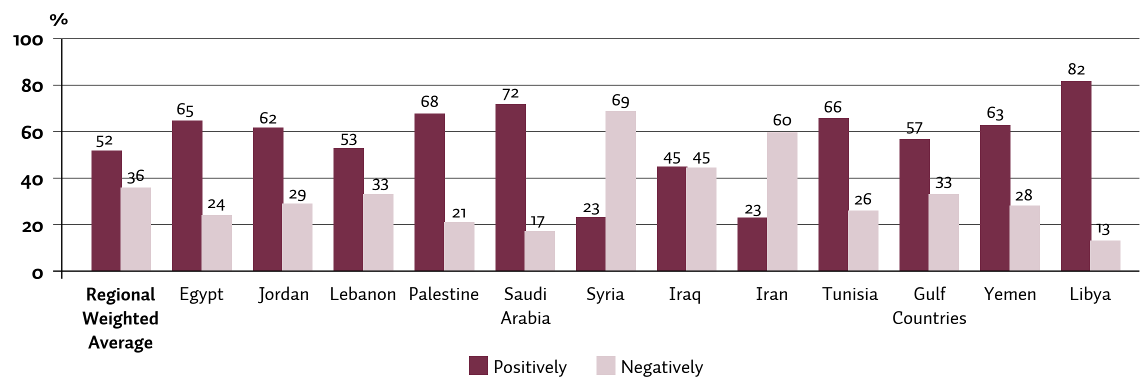


FIGURE 20: TURKEY'S ROLE IN THE MIDDLE EAST

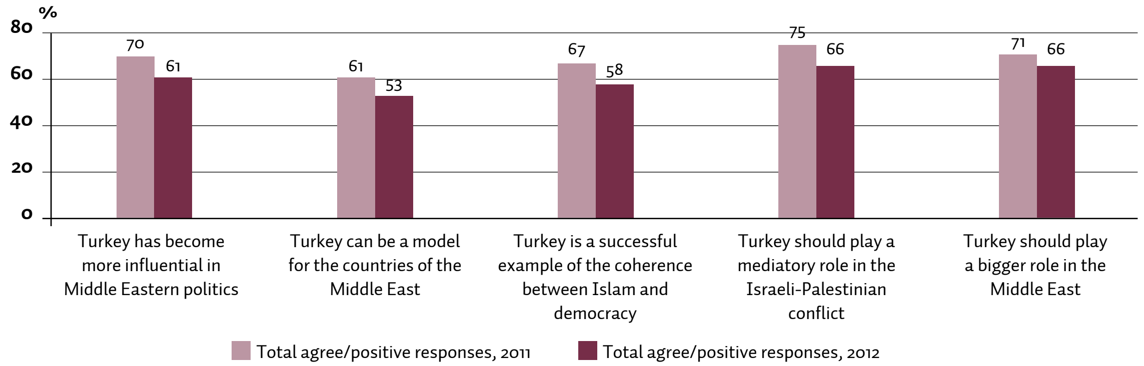


Figure 20 details responses to questions aimed at understanding Turkey's role in the Middle East. Before detailing the questions, it can be said that there is continued interest in and support for Turkey's role albeit less so than last year.

The first question detailed aims to understand how much Turkey's presence in the region is felt. 61% of respondents agree that Turkey has become more influential in Middle Eastern politics, while according to the final column 66% think that Turkey should play a bigger role in the region. This is also a 5 percentage point drop on last year's findings.

Palestinian respondents are the most supportive of an increased role for Turkey (79%), followed by respondents from Libya (75%), Egypt (74%), Yemen and Tunisia (both 73%). 70% of respondents from Iraq, too, agree. Indeed, bar one exception, more than 60% of respondents from all countries think that Turkey should play a bigger role in the region. Respondents from Syria look negatively on an increased Turkish role, with only 39% agreeing with the proposition.

58% of respondents support the idea that Turkey successfully combines Islam and democracy. Although, again, this is a lower figure than last year. Egyptian respondents are the most supportive of the statement (80%), with 78% of Tunisian respondents also expressing support. The least supportive respondents are from Syria and Iran (31% and 37% respectively). Also there is low levels of support among Iraqi respondents (45%). Apart from these three support from all other countries is above 60%.

Eventhough the tension between Turkey and Israel, 66% of respondents support a Turkish role in mediating in the Israeli-Palestinian conflict, with Palestinian respondents the most supportive of the proposition (83%). Libyan and Egyptian respondents are also very supportive of Turkish mediation (81% and 75% respectively). Even in Syria positive responses to the preposition only just surpass negative ones (41% to 39%).

When looking at responses to the question of whether Turkey can be a model, the first point of note is the concept is still valid. 53% of respondents are of the opinion that Turkey is a model. Although support for the idea has dropped, the decline is not fundamental. The most supportive respondents are from Tunisia, Libya (both 71%) and Palestine (70%). Levels of support in Egypt and Yemen are 67%, while Syrian and Iranian respondents are not supportive of the Turkish model. Support in Syria is 22% and 37% in Iran.

FIGURE 21: WHY IS TURKEY A MODEL?

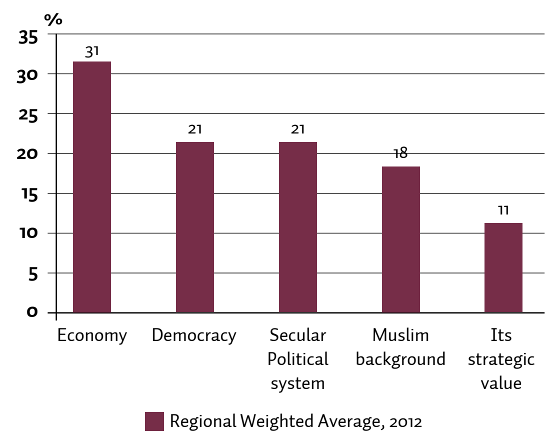
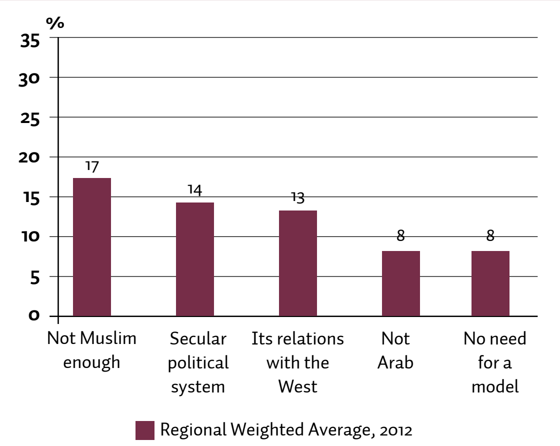


FIGURE 22: WHY ISN'T TURKEY A MODEL?



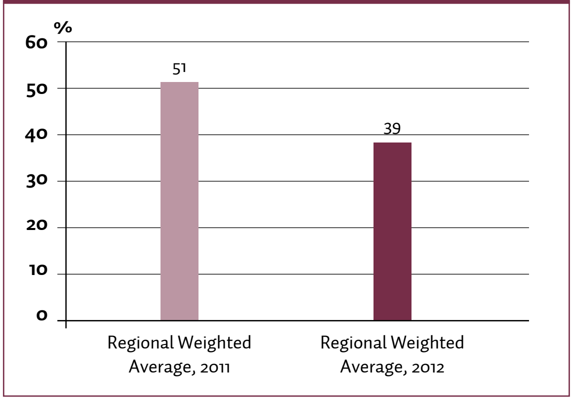
As in the previous two years, we asked those who thought Turkey could or could not be a model why they thought so. Figures 21 and 22 detail our findings. First among reasons as to why Turkey can be a model is its recent economic success (31%), while its democratic regime occupies second place with 21% of responses. Turkey's Muslim identity (18%) is the third most common response, followed by the country's strategic value (11%).

Economic reasons are first among responses in Egypt, Jordan, Palestine, Tunisia and Yemen, whereas Turkey's secular system gains prominence in Lebanon, Syria and Iraq (30%, 27% and 38% respectively). The most common Saudi responses are split almost equally between Turkey's democratic regime, secular system and Muslim identity.

Compared to the 2011 results, the five most common responses are the same albeit in a different order. Last year, the most common response to why Turkey could be a model was its democratic regime, whereas its economic success ranked second. 32% of respondents identified Turkey's democratic regime last year as the reason why it can be a model, compared to 21% this year, and 25% identified Turkey's economy, compared to 31% this year.

The primary reason why Turkey is not seen as a model for the countries of the Middle East is the same as last year: it's not Muslim enough. As shown in figure 22, its secular political system and its close relations with the West are the second and third most common response. Unlike the previous year, the answer 'there is no need for a model' (8%) is prominent this year.

FIGURE 23: SUPPORT FOR TURKEY'S EU ACCESSION



The survey again repeated one question on Turkey – EU relations. The diminishing support for Turkey's accession is noteworthy; this year 39% of respondents support Turkey's membership, 23% don't support it, while 29% are undecided. Only in Egypt (53%) and Libya (56%) do more than half of respondents support Turkey's membership. In comparison to 2011, the drop in support is probably a reflection of the economic

FIGURE 24: THE REGION'S STRONGEST ECONOMY: NOW AND IN TEN YEARS

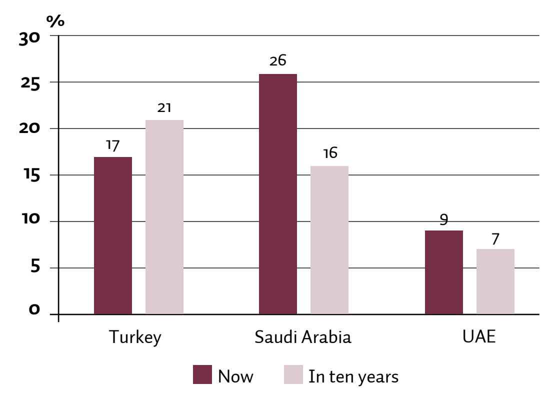
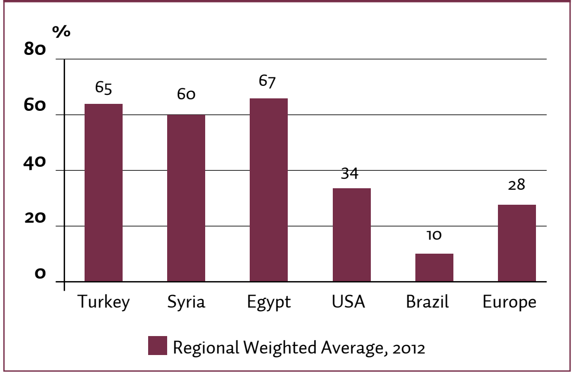


FIGURE 25: HAVE YOU EVER WATCHED A TV SERIES FROM THE FOLLOWING COUNTRIES?



crisis in the EU, questions about its internal integrity and the stalled membership process.

Perception of regional economic power mirrors previous years' responses, with Saudi Arabia ranking first (figure 24). As was the case with 2011, Turkey follows Saudi Arabia with 17% of responses with the UAE seen as the region's strongest economy by 9%. The ranking of the three countries has not changed in the last two years.

In line with last year's results, Turkey is seen as the region's coming economic leader. 21% of respondents identify Turkey as the region's strongest economy in ten years, with Saudi Arabia in second (16%). Respondents from Iran (33%) and Egypt (23%) are the most likely to identify Turkey as the region's strongest economy in ten years. The only respondents to identify Egypt as the region's future economic leader are Syrians (10%).

Finally, respondents were asked about the origin of the TV series they watched. Egyptian soap operas are the most popular among respondents (67% of respondents have watched an Egyptian TV show), with Turkish series a close second (65%). Syrian series are the third most watched (60%). TV series from three countries/areas outside the region are watched by less than half of respondents. The fact that Turkish series are almost as watched as their Egyptian counterparts demonstrates how popular they are. Turkish TV series are most popular among Iraqi respondents (97%) and least popular among Saudi respondents (52%).

Concluding Remarks

When we started this series of research four years ago, the results pleasantly surprised us. The Arab world's view of Turkey and its regional politics were more positive than we expected. The following year saw an increase, while 2011 saw a levelling off that pointed towards potential decline. A decline that was witnessed this year.

There has been an apparent decline in sympathy towards Turkey in the Middle East and North Africa this year. Fewer people see Turkey as a model, value its influence, take seriously its democracy, ascribe it a conflict resolution role and believe it should play a bigger regional role.

We want to leave the reader to interpret the results of the data and thus have not over interpreted it. However, what we see is that Turkey's brand has started to lose its lustre.

Part built through historical coincidence, part by choice, we think it's vital Turkey maintains its value. Nevertheless, this value is not everything and we want to emphasise that it is difficult to convert this to political influence.

In our opinion, Turkey's recent politics towards the region is not the only reason for its decline; there has been a fall among all evaluations and positive perceptions. But it seems that there is a growing need to forget the strong reaction to Israel witnessed in recent years. Above all, Turkey is not the only model now. In Egypt and Tunisia new models are starting to emerge. And those countries that have undergone transition have started to change how they position themselves towards Israel.

In other words, while the decline in perception of Turkey is not uniquely because of its policies, they have played their part. And policymakers should take this role into account. Policymakers should not forget that Turkey's positive image is based on democracy, human rights and values.

In sharing this data and report with you, we are not just addressing Turkey, the AK party or the people of Turkey. This data on the perception of Turkey is for the benefit of relations with the region, those who act on behalf of the international community and those that design policies for the region. The fact that the economy remains the region's most important question and the biggest threat to it is Israel should also be cause for thought and reflection.

Methods in detail

The Perception of Turkey 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 2,800 participants were 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 on August 3-28, 2012. The questionnaire consisted of 37 substantive questions, 10 demographic questions, and 19 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 realised by 29 trained interviewers who are native speakers of Arabic. The average length of a successful interview was 38 minutes; ranging from 28 minutes to 54 minutes. Households were selected by generating random numbers (last 4 digits) and respondents were selected using the Next Birthday method. During the 14 country MENA fieldwork, there were 5,681 contact attempts made. Of these, 1,762 resulted in non-contacts, yielding a non- contact rate of 31%. Of the 3,919 successful contacts, there were 2,244 refusals giving the study a 57.3% response rate.

Iran: CATI fieldwork was realised by 10 trained interviewers who are native speakers of Farsi. The average length of a successful interview was 38 minutes; ranging from 28 minutes to 53 minutes.

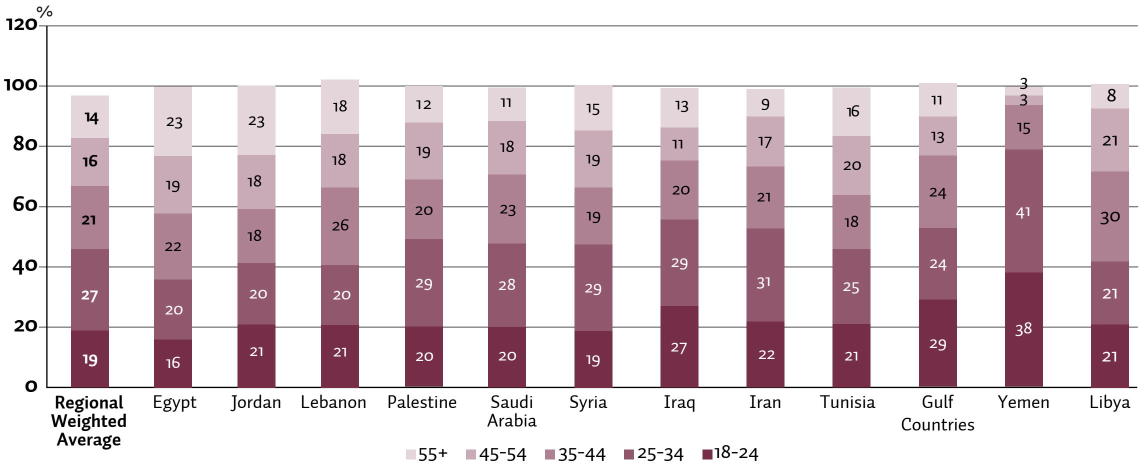
Households were selected by generating random numbers and respondents were selected using the Next Birthday method. Regarding the response rate in Iran, there were 1,082 contact attempts made. Of these, 586 resulted in non-contacts, yielding a non-contact rate of 54.2%. Of the 496 successful contacts, there were 221 refusals giving the study a 55.4% response rate.

Iraq: F2F interviews were conducted by 38 trained Iraqi interviewers. The average length of a successful interview was 37 minutes; ranging from 28 minutes to 46 minutes. 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. Regarding the response rate in Iraq, there were 349 contact attempts made. Of these, 23 resulted in non-contacts, yielding a non-contact rate of 6.6%. Of the 326 successful contacts, there were 56 refusals giving the study an 82.8% response rate.

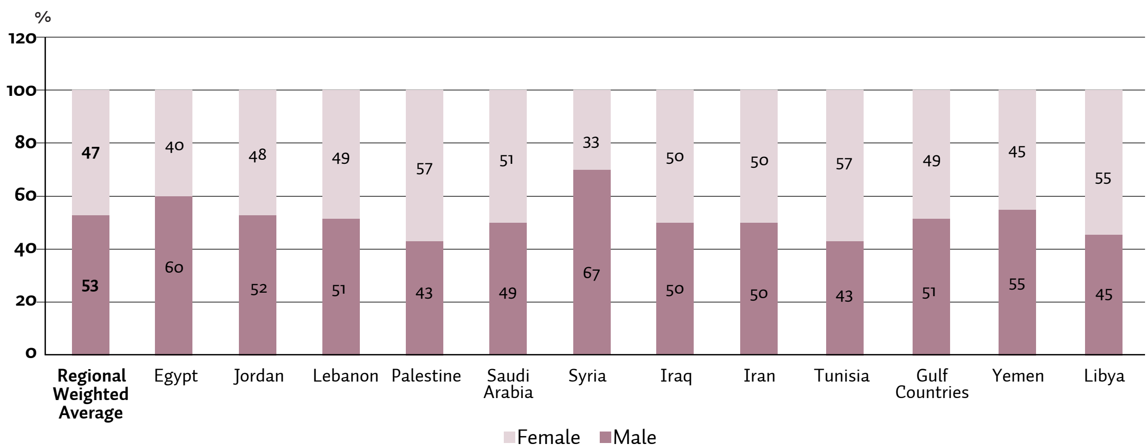
Country	Method	Fieldwork dates	Total population/ 18+ population	Sampling cities	Sample size	Weighting factor
Egypt	CATI	3-28 August 2012	83,133,140/ 52,610,458	Cairo, Al Gizah, Alexandria, Ash Sharqiyah	240 adults aged 18+	3.07110
Jordan	CATI	3-28 August 2012	6,363,425/ 3,622,655	Amman, Irbid, Zarga, Balqa	283 adults aged 18+	0.17934
Lebanon	CATI	3-28 August 2012	4,311,450/ 3,042,929	Jabal Lubnan (Mount Lebanon), Beirut, Bekaa, Al-Shamal (North)	235 adults aged 18+	0.18141
Palestine	CATI	3-28 August 2012	4,165,878/ 2,122,487	Nablus, Gaza, Jerusalem (Arabs only), Al-Khalil	286 adults aged 18+	0.10397
Saudi Arabia	CATI	3-28 August 2012	28,250,717/ 18,308,245	Aseer, Eastern Province, Makkah, Riyadh	256 adults aged 18+	1.00587
Syria	CATI	3-28 August 2012	29,906,756/ 12,013,123	Damascus, Aleppo, Homs, Hama,	205 adults aged 18+	0.82099
Tunisia	CATI	3-28 August 2012	10,724,572/ 7,704,996	Tunis, Sfax, Sousse, Nabeul	243 adults aged 18+	0.44422
Yemen	CATI	3-28 August 2012	24,876,797/ 12,218,305	Al-Hudaydah, Hajjah, Sana'a, Ibb	143 adults aged 18+	1.19704
Libya	CATI	3-28 August 2012	6,464,263/ 4,171,491	Tripoli, Benghazi, Zawiya, Misrata	130 adults aged 18+	0.44955
Gulf Countries (Bahrain, Kuwait, UAE, Qatar, Oman)	CATI	3-28 August 2012	16,783,866/ 12,792,907	Manama, Kuwait City, Abu Dhabi, Doha, Muscat	207 adults aged 18+	0.71261 0.65491 2.00610 0.87791 0.35392
Iraq	F2F	12-16 August 2012	32,810,344/ 16,732,021	Baghdad, Erbil Basra, Anbar, Nineveh, Thi-qar	286 adults aged 18+	0.81963
Iran	CATI	13-22 August 2012	75,579,296/ 54,519,800	Tehran, Khorasan Rezavi, Esfahan, East Azerbaijan, West Azerbaijan, Ardabil	286 adults aged 18+	2.67068

Demographics*

AGE DISTRIBUTION

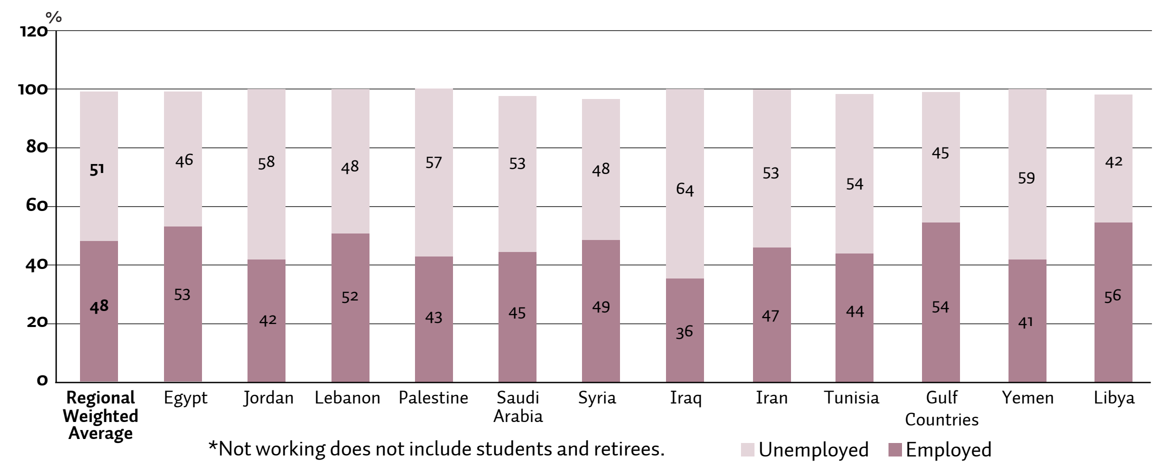


GENDER DISTRIBUTION

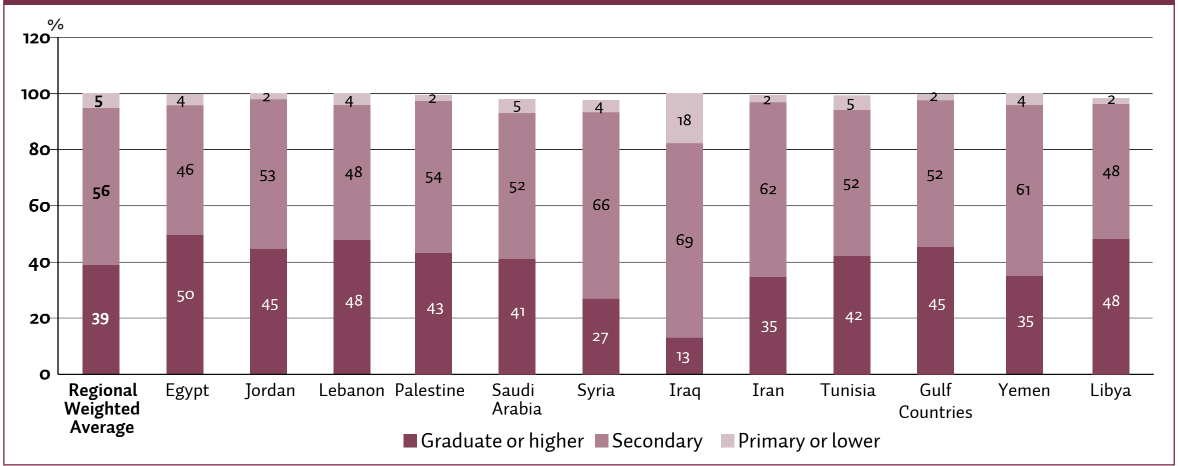


* **Due to rounding not all percentages add up to 100%.**

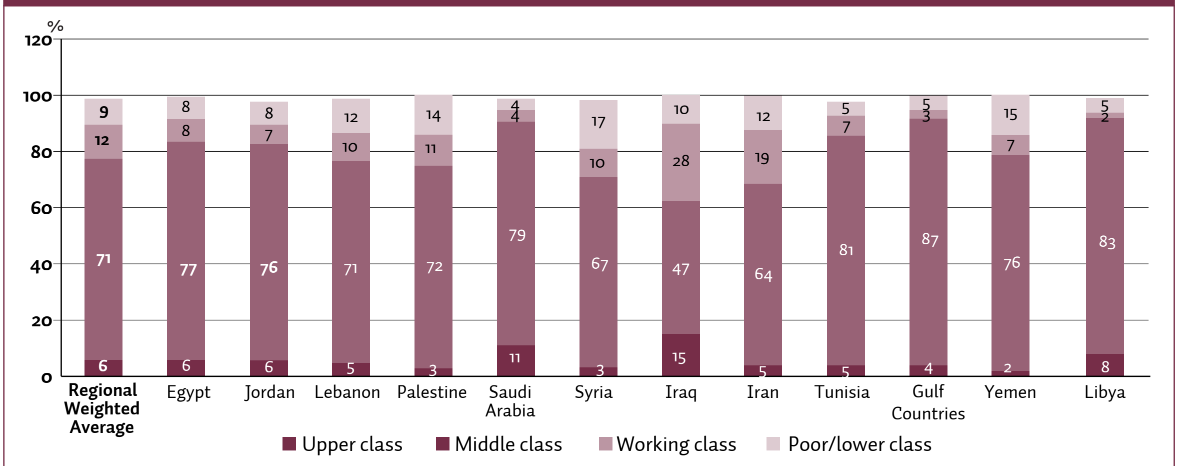
EMPLOYMENT STATUS



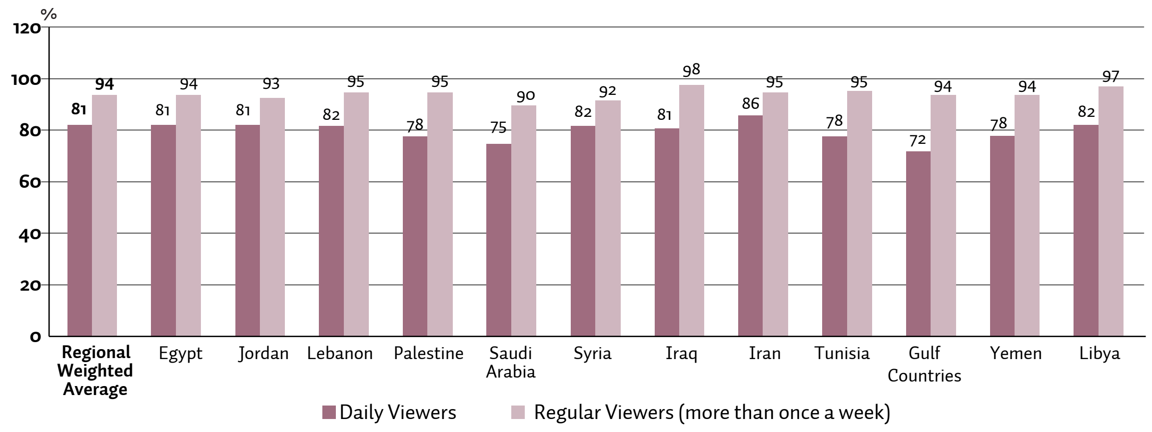
EDUCATION LEVEL



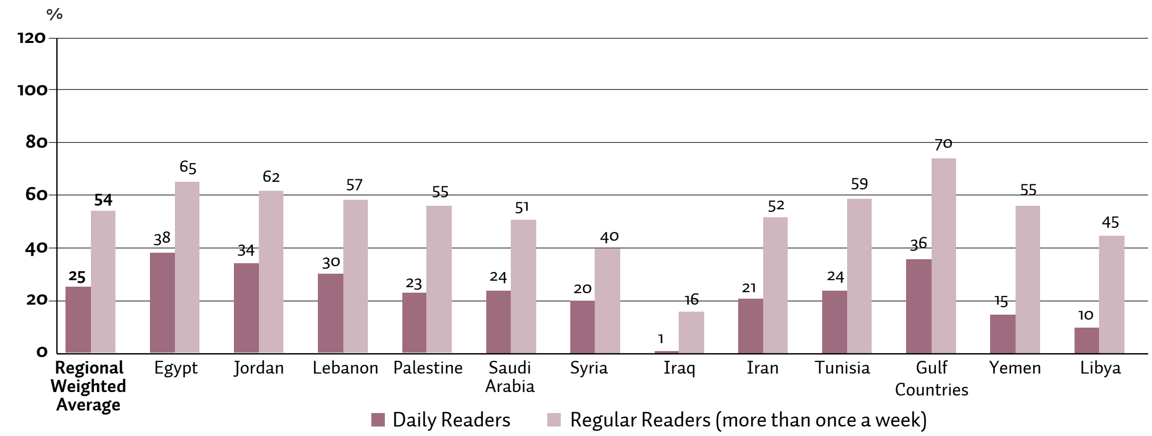
SOCIAL CLASS (BASED ON RESPONDENTS' CLAIM)



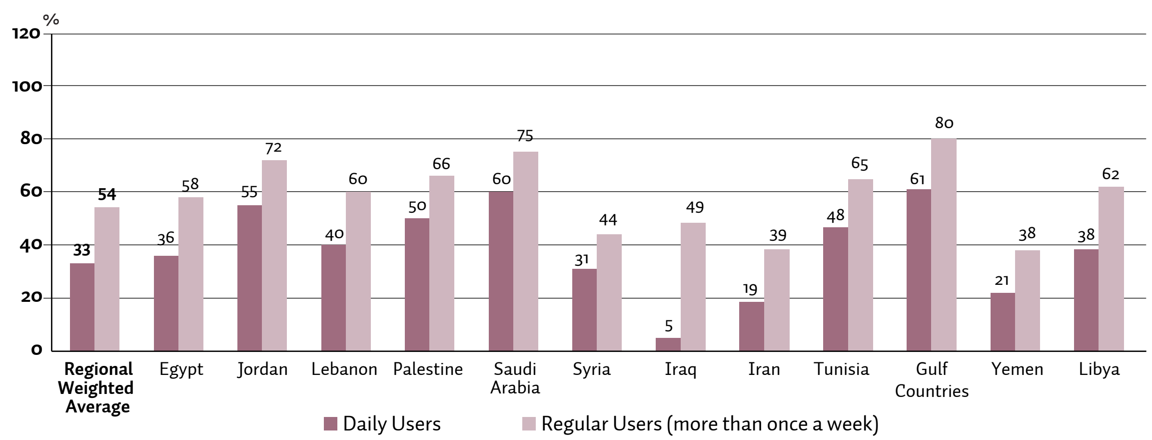
RESPONDENTS WHO WATCH TV



RESPONDENTS WHO READ NEWSPAPERS



RESPONDENTS WHO USE THE INTERNET



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