

TESEV Foreign Policy Programme

The Perception of Turkey in the Middle East 2013

Mensur Akgün, Sabiha Senyücel Gündoğar



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Foreword

Mensur Akgün & Sabiha Senyücel Gündoğar, TESEV Foreign Policy Programme

This report entails the key findings of the fifth Perception of Turkey in the Middle East research series we realized as TESEV Foreign Policy Programme and KA Research. The research conducted between August 15 – September 13 2013 in 16 countries with 2800 respondents over the age of 18 reveals striking results as in previous years.

The most striking finding is that despite the decline in positive perception rates of Turkey in Egypt and Syria in parallel to Turkey's political approach to these countries, the image of Turkey retains its power. Even though Turkey has been experiencing internal turmoil, it is still perceived as a model by half the participants. Turkey is still regarded as one of the powerful political actors of the region.

However, the survey reveals that the sympathy for Turkey has dropped by 19 percentage points over the last three years. The erosion of sympathy in Egypt has a large impact in this decline. In Egypt, where the expression of affinity for Turkey was at 84% last year, this rate has dropped to 38% in 2013. There is no evident decline in responses from other countries. The lowest rate is in Syria with 22%.

As can be expected, in the period between 2011 and 2013 there has been a dramatic increase in the number of people from Egypt and Syria who think that Turkey, or more precisely the AK Party government, does not treat their governments amicably. There is a drop in positive response rates in questions pertaining to almost all issues regarding Turkey in responses from these two countries.

Compared to the previous year, it can be noted that the perception that Turkey is pursuing sectarian policies is on the rise in the region. With an 11 percentage point increase, this rate has reached 39% this year. Still, 64% of the participants state that Turkey is becoming ever more influential in the region, while 60% would like to see it play a bigger role.

Participants' responses to questions regarding their own countries and the region also include noteworthy findings. For instance, in Egypt, the support for the July 3rd military coup is at 67%. 76% of the respondents from the 16 countries believe that law is legitimately grounded in religion. As always, Israel is regarded as the greatest threat to the region. With the election of Hassan Rouhani as president, there is greater hope in the future in Iran.

We hope that the findings in the following pages will foster a better understanding of the trends in the region, guide decision makers and researchers and contribute to peace and stability in the region.

Key Findings

1. Support for Turkey's role in the Middle East.

60% of the respondents think Turkey should play a bigger role in the region; and 64% of them indicate that it is becoming more influential every passing day. More than 60% of the respondents from all countries bar Egypt and Syria support Turkey's being more prominent in the region.

2. Turkey and Saudi Arabia are perceived as regional political powers.

In response to an open-ended question, participants refer to Turkey and Saudi Arabia as equivalent political powers of the region. In terms of economy, Saudi Arabia comes first; Turkey comes in the second place. With regard to military power, Egypt, Iran and Turkey are referred.

3. The most favourably thought of country is not Turkey anymore, it is United Arab Emirates.

67% of the respondents had a positive view of the United Arab Emirates. Saudi Arabia comes in the second place with 60%, and Turkey comes third with 59%. In the years 2011-12, Turkey was placed on the top.

4. Turkey is still perceived as a model.

51% of the respondents regard Turkey as a regional model. Except for Syria, Egypt, Iraq and Iran, Turkey's being a model finds support in other countries at a high rate. From among the countries with least support for Turkey, Syria has the minimum with 22%. The respondents who see Turkey as a model point to its economy and democratic regime.

5. Interest in Turkey's domestic politics.

The interest in Turkey's Kurdish peace process is below expectations; 31% of the respondents are aware of the developments. 85% of the informed respondents support the process. 71% of the respondents have followed the protests called Gezi Parkı; and 50% think the protests contributed positively to Turkey's democracy.

6. The perception on the pursuit of sectarian foreign policy is soaring.

Compared to 2012, the perception on Turkey's pursuit of sectarian foreign policy is spreading. While 28% of the respondents said that Turkish foreign policy was sectarian, 39% say so this year. Iraq (65%), Syria (62%), and Iran (61%) are regarded as countries whose foreign politics are most sectarian.

7. Future expectations.

Considering the recent developments in the region, 59% of the respondents feel positive about the future. Iran is the country where expectations from the future increased the most compared to a year ago. 64% of the Syrian respondents felt positive about the future. The respondents from Iraq are the most pessimist ones on the future, only 22% of them think future will be better than today. Economy comes to the fore as the most important problem of the region.

8. Israel and the USA are perceived as the biggest threats to the region.

Since 2011, the response to the threat perception question has not changed; respondents name Israel first, and then the USA. Iran comes in the third place with 10%.

9. Religion as the resource of law.

76% of the respondents agree with the statement that law derives its legitimacy from religion. This view is mostly shared in Yemen, Libya and Saudi Arabia with rates above 85%.

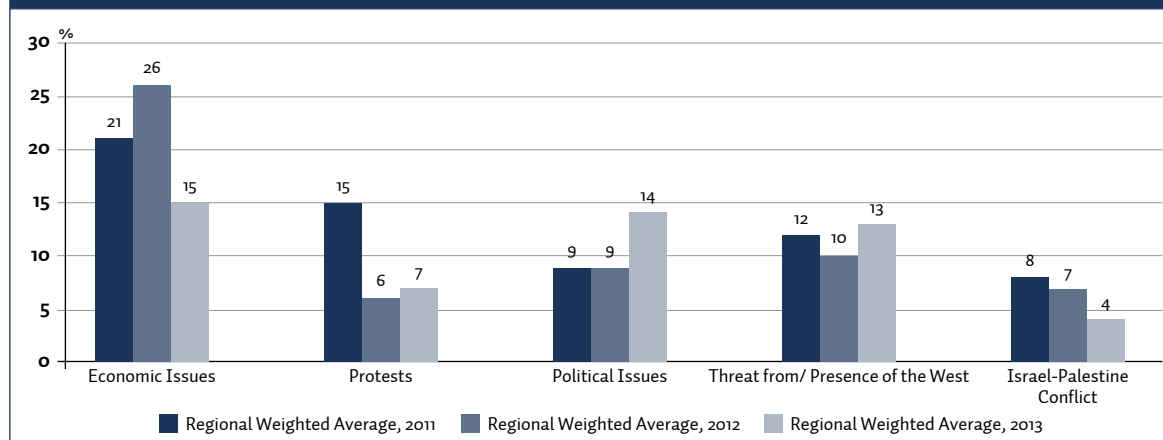
10. Support for the military coup in Egypt.

43% of the respondents think that the coup was a positive development for Egypt, whereas 46% does not think so. In Egypt, 67% of the respondents think the coup is good for their country.

Section 1

Regional Overview

FIGURE 1: THE MOST URGENT ISSUE IN THE MENA REGION



Respondents from 16 countries¹ included in the research in 2013 cite economic problems² as the most important concern of the Middle East region. However, in contrast to the past two years, this is not the single most important issue, and its significance has decreased in the regional average. While 26% of the respondents rated economy as the most pressing issue in 2012, in 2013, 15% have opted for this response.

In 2012, throughout the 16 countries the survey was conducted in, economic problems were identified as the most urgent concern of the region except in Iraq³,

whereas in 2013 the economy comes up as the second or even in third issue in some countries.

Even though responses vary from country to country, political issues and security/terrorism have scaled up their influence. Political concerns come to the fore especially in Egypt, Lebanon, and Tunisia. In Iraq and Libya, the presence/threat of the West⁴ is ranked as the most pressing issue. Respondents in Syria cite security/terrorism as their utmost concern.

6% of respondents overall regard Syria as the most pressing problem of the region. In Saudi Arabia and Egypt, this rate goes up to 11% and 10% respectively. Only in Iran, economic concerns are ranked as the most important issue by a significant margin, with 25% of the respondents prioritizing the economy over other issues.

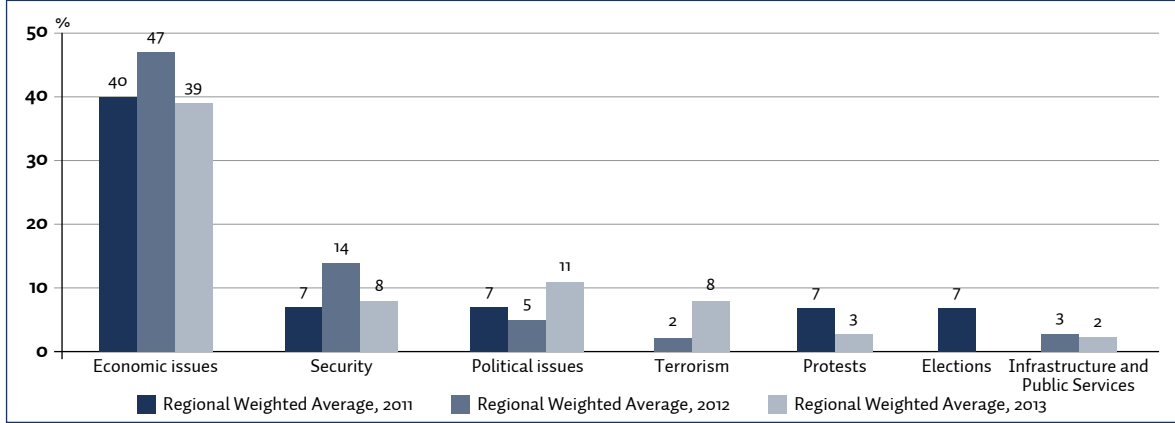
¹ The Perception of Turkey in the Middle East 2013 Survey was conducted in 16 Middle East countries between August 15 - September 13 2013: Egypt, Jordan, Lebanon, Palestine, Saudi Arabia, Syria, Iraq, Iran, Tunisia, Oman, Bahrain, Qatar, United Arab Emirates, Kuwait, Yemen and Libya. For detailed information, please see Methodology.

² Responses including the economy, poverty and unemployment are grouped under economic issues.

³ In Iraq, political issues were identified as the most important concern.

⁴ The threat and presence of the West and US intervention are grouped under threat of the West.

FIGURE 2: THE MOST URGENT ISSUE IN YOUR COUNTRY



As in previous years, in 2013, the Israeli-Palestinian conflict remains a relatively low significance issue among concerns of the region at 4%. Also similar to last year, mass protests are identified as the most important issue on the region’s agenda by 7% of the respondents.

When asked about the most urgent issue in their own countries, with 39%, the economy is the most common response. However, it should be noted that this rate signifies an 8 percentage point decrease compared to 2012 (Figure 2). Security was expressed as the second most pressing concern in 2011 and 2012. The ranking changes in 2013 with political issues coming up second at 11% and security and terrorism third (8%) as the most urgent issue facing the respondents’ own countries.

Iran is the country where economic problems are identified most prevalently as the primary concern with 86%; Jordan follows Iran with economy prioritized by 66% of the respondents. Participants from Yemen (37%), Palestine (36%), Tunisia (30%), Saudi Arabia (32%), Gulf Countries⁵ (29%), and Lebanon (26%), though at lower rates, also identify the economy as their primary concern.

In Libya, with 54%, security issues of the country are pronounced as the top concern. Similarly, in Syria terrorism is the most common response at 30%. Terrorism (17%), security (12%), and Muslim Brotherhood (10%) are issues coming to the fore in Egypt. The shift in people’s priorities instigated by recent developments and ongoing political processes in Egypt reflect in the findings of the survey: while 30% of participants’ responses to this question were the economy in 2012, this year the corresponding rate is as low as 9%.

The public perception of certain countries is among questions repeated each year in scope of the research. Comparative responses from 2011 to 2013 are presented below in Figure 3.

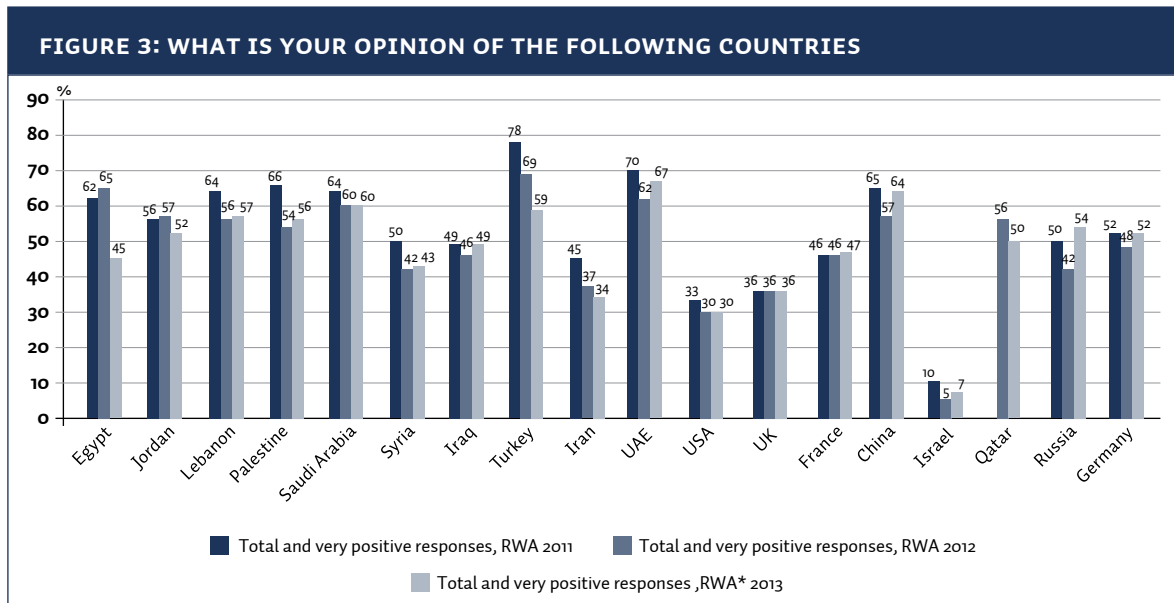
In 2013, the United Arab Emirates holds the highest rank of positive perception with 67%. While in 2011 and 2012 Turkey ranked first at 78% and 69% respectively, this year it is in fourth place (59%), following China at 64% and Saudi Arabia at 60% as second and third most favorable countries. Lebanon holds fifth place (57%) after Turkey.

It is possible to identify from which country or countries the decline in the positive perception of Turkey stems from in the following section delineating responses on Turkey from individual countries (Figure 19). As demonstrated in the comparative findings, there is a 19 percentage point decrease in the positive perception of Turkey since 2011.

⁵ Gulf Countries include Qatar, Bahrain, Kuwait, Oman and the United Arab Emirates. For detailed information, please see Methodology.

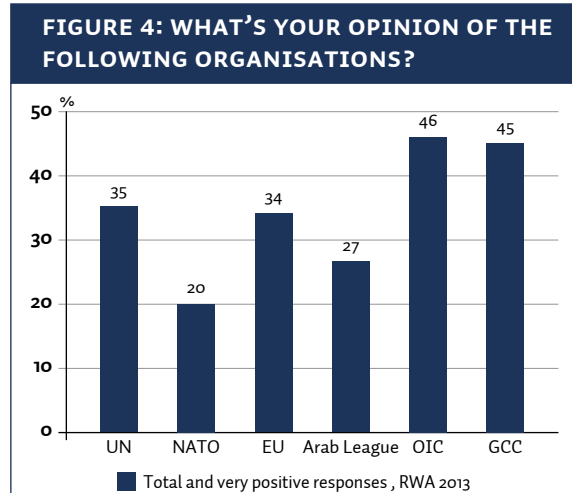
As for other actors in the region, Egypt demonstrates the sharpest fall. Only 45% of the respondents expressed favorable opinion of Egypt in 2013, whereas the popular perception was 62% in 2011 and 65% in 2012. Considering in this three year period, Iran also shows an 11 percentage point decline: the 45% positive perception rate of the country in 2011 drops to 34% in 2013. As Figure 3 demonstrates, perception of Saudi Arabia has remained consistent over the last three years, and Israel is still the least favorable country in the region at 7%.

The Arab League's loss of stature is evident considering the 2011-2013 findings comparatively. While 40% of the participants expressed positive opinion of the Arab League in 2011, this rate has dropped to 31% in 2012 and 27% in 2013. The decline is particularly marked in Syria. In 2009, when the survey was first conducted, 54% of the respondents from Syria stated favorable opinions of the Arab League; however, in 2013 this rate has dropped as low as 6%.



In terms of actors beyond the region, China holds first place in positive perception at 64% with a 7 point increase from 2012. Another country on a rising trend is Russia: while 42% of participants expressed favorable opinion of the country in 2012, this rate has climbed to 54% in 2013. There is no significant shift in ratings of Western countries; Germany stands out as the most favorable Western country (52%).

As for the question regarding international organizations, Organization of Islamic Cooperation (OIC), with the highest rate of positive perception at 51% in 2012, is still the most favorable institution in 2013 with 46%, followed by the Gulf Cooperation Council (GCC) with 45% in second place.

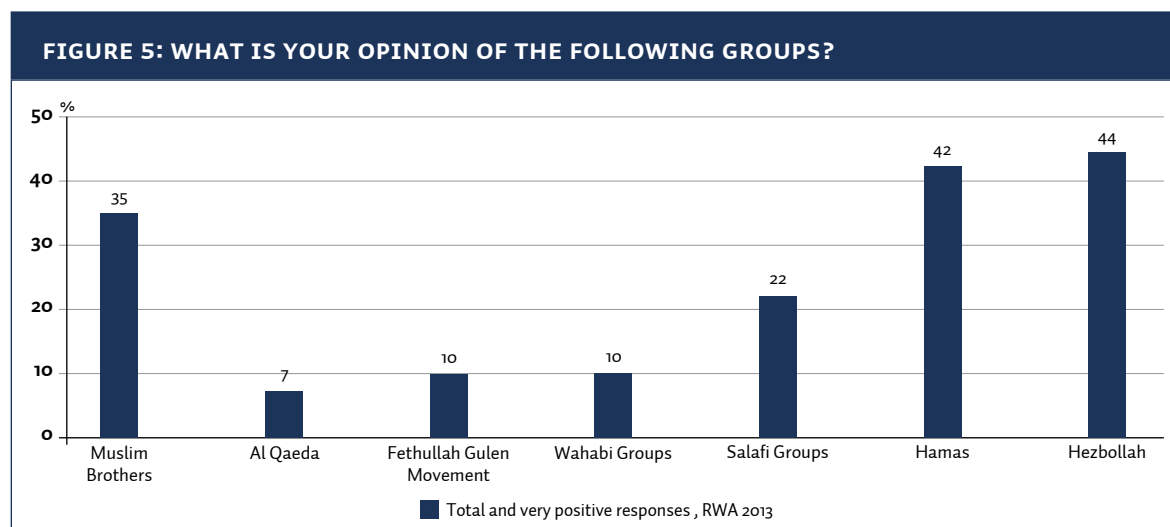


* Regional Weighted Average

Once again in the case of Syria specifically, OIC is the institution with the highest rate of positive perception (25%), while the European Union (EU) and NATO appear to have lost prominence in public opinion. Participants from Egypt regard NATO as the least favorable institution at 13% and GCC as the most positive with 48%. The EU seems to have lost approval in Egypt: while in 2009, 46% of the respondents held positive regard of the institution, this rate has decreased to 28% in 2013.

Hezbollah, but Muslim Brotherhood holds the top rank at 58%. The positive perception rate for Hamas in Iraq is 53%, while there is no support for Al Qaeda.

Hamas has the most positive image in Yemen with 73%, followed by Muslim Brotherhood (53%) and Hezbollah (46%). The country with the lowest positive perception rate of Hamas is Egypt with 25%.



For the first time in this research series, the 2013 survey included a question on participants' opinions on certain groups. Respondents were asked to indicate whether they held positive or negative opinions of the seven groups presented to them. Of these choices, Hezbollah ranked first in positive perception overall in the region with 44%, followed by Hamas, which was favored at 42%. Across the region, 35% of the respondents offered a positive opinion of Muslim Brotherhood. The overall regional positive perception rate of Salafi Groups is 22%, Wahabi Groups 10%, and Al Qaeda 7%. 10% of respondents expressed a favorable opinion of the Gulen Movement.

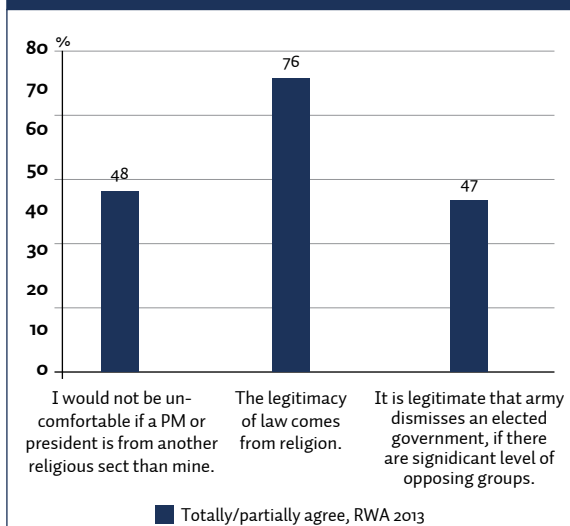
The country in which Salafi Groups enjoy most widespread high regard is Iraq (42%). In Iran and Syria, Salafis hold rather low approval rates, at 1% and 5% respectively. The Gulen Movement ranks lowest in terms of positive perception in Iran, Syria, and Jordan, while respondents in Iraq express the most support at 27%.

After Iraq, the Muslim Brotherhood is most popular in Yemen (53%). Jordan, Tunisia, and Iran can also be considered among countries with strong support for the organization. 28% of the respondents from Egypt express support for the Muslim Brotherhood.

Hezbollah holds positive regard most extensively in Syria with 74%. The organization also has prevalent positive perception in Iran with 67%. 56% of respondents in Iraq express favorable opinion of

Al Qaeda is most prevalently supported by respondents from Palestine at 20%. 11% of respondents in Jordan, Saudi Arabia, and Gulf Countries, 10% in Tunisia and Yemen, and 9% in Lebanon and Egypt have a positive opinion of Al Qaeda.

FIGURE 6: WHAT IS YOUR OPINION OF THE FOLLOWING STATEMENTS?



In order to understand participants' inclinations regarding certain issues, some additional questions were posed to respondents in 2013, and they were asked to indicate whether they agreed or disagreed with the given statements. According to the findings summarized in Figure 6, 48% of the respondents state they will not be uncomfortable if the leader of their country is from a different religious or ethnic group. This rate is rather consistent across the region with only respondents from Iraq and Libya expressing a higher rate of acceptance in case of such a situation. 67% of participants in Iraq and 55% in Libya state they would feel comfortable with a leader from a different religion or ethnicity.

Another subject of inquiry was whether participants regarded religion as the basis of law. Across the region, 76% of the respondents regard religion as the legitimate basis of law. The responses to this question from different countries are comparable and at high rates. In Libya and Yemen, agreement with this statement is as prevalent as 90%. It is possible to assert that there is a difference in Lebanon and Syria: in these two countries, 56% and 51% of the respondents respectively regard religion as the primary source of law.

47% of respondents find it legitimate for the army to overthrow an elected government in case of

widespread street opposition. With a rate of 70%, such an intervention meets most acceptance in Iraq. 60% of participants from Syria and Libya are of the same view that this act would be legitimate as do 52% of the respondents from Egypt. The lowest rate of agreement with this statement is in Iran.

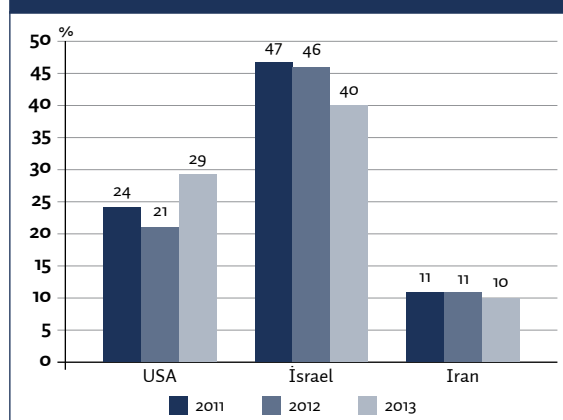
POWER-THREAT PERCEPTION

40% of the participants identify Israel as the greatest threat to the region. Detailed in Figure 7, this rate has remained consistent since the survey was first conducted. The USA ranks second once again with 29% of respondents citing the country as the utmost threat. Iran comes third, although at a considerably lower rate.

The two countries which regard the USA as a greater threat than Israel are Iran and Iraq. However, while the USA emerged as the greatest threat by a large margin in Iran in the previous years, in 2013 there is no such gap between Israel and the USA in this country with both receiving comparable rates. The country where the perception of the US has shifted most negatively is Egypt: while in 2012 it was perceived as the greatest threat by 11%, in 2013 the rate has risen to 39%. Meanwhile whereas Israel was cited as the utmost threat by 63% of the respondents in Egypt in 2012, 40% of participants rank it at the top in 2013.

The three countries where Israel is rated most prevalently as the greatest threat are Libya, Tunisia and

FIGURE 7: WHICH COUNTRY POSES THE GREATEST THREAT TO THE REGION?



Palestine respectively, whereas respondents from Iraq least commonly rank Israel at first place. Participants from Saudi Arabia, Yemen and Libya identify Iran rather than the US as the second largest threat. Iran is most widely perceived as the main threat in Saudi Arabia (33%). In Iraq, Iran and Israel both rank second at 21%.

Another striking finding of the 2013 survey is that in Iraq, Saudi Arabia is regarded as a threat by 10% of the respondents. In previous years, Saudi Arabia was never mentioned as a threat with a percentage over 3% or 4% in any country. Turkey is not perceived as a threat in the Middle East. Only 2% of all participants opt for Turkey, with the rate being highest in Iraq at 5%, followed by Syria with 3%.

When it comes to perceptions of regional power, Turkey, Iran, Saudi Arabia, the United Arab Emirates, Egypt, and Israel emerge as key players based on the quality of the responses. As the responses to the open-ended question presented to the participants demonstrate, the most definite answer comes up pertaining to the question of economic power in region. As delineated in Figure 8, respondents' assessment is almost the same as last year. 29% of the participants identify Saudi Arabia as the region's foremost economic power. Turkey ranks second (16%), followed by the United Arab Emirates at 12%. Qatar is in fourth place (6%) and Iran in fifth (5%).

When the question is posed in terms of political power, both at 12%, respondents cite Turkey and Saudi Arabia.

Iran and Egypt retain the same ranking as in 2012 at 9%. As in 2012, Iran is denoted as the strongest military power by 12% in 2013; however, 13% of respondents identify Egypt as the foremost military actor. It is worth noting that in 2012 Egypt was rated at 7% in this category. The recent developments in Egypt appear to have resulted in a shift in participants' perceptions. In 2013, Turkey ranks third (9%) as a regional military power following Egypt and Iran. Saudi Arabia, mentioned as the primary economic and political power, lags behind in terms of military stature. Israel, expected to be perceived as one of the strongest military powers, follows Turkey in the fourth spot with 6%.

In terms of cultural influence, Turkey (12%) and Saudi Arabia (11%) are once again the most common responses. The United Arab Emirates is the third most popular answer at 8%. Egypt (6%) ranks fourth.

Questions on whether respondents thought given countries pursued sectarian foreign policy were repeated this year. As findings in Figure 10 indicate, while the ranking has remained the same in 2012 and 2013, the overall number of respondents who think foreign policies have become sectarian roots is on the rise.

Iraq's foreign policy is most widely regarded as sectarian by participants overall at 65%. As in 2012, Syria follows Iraq, although with a percentage increase from 53% to 62%. The same applies to Iran: while in 2012 55% of the participants found the country's foreign policy sectarian, in 2013, this rate is as high as 61%.

FIGURE 8: REGIONAL POWER 2013

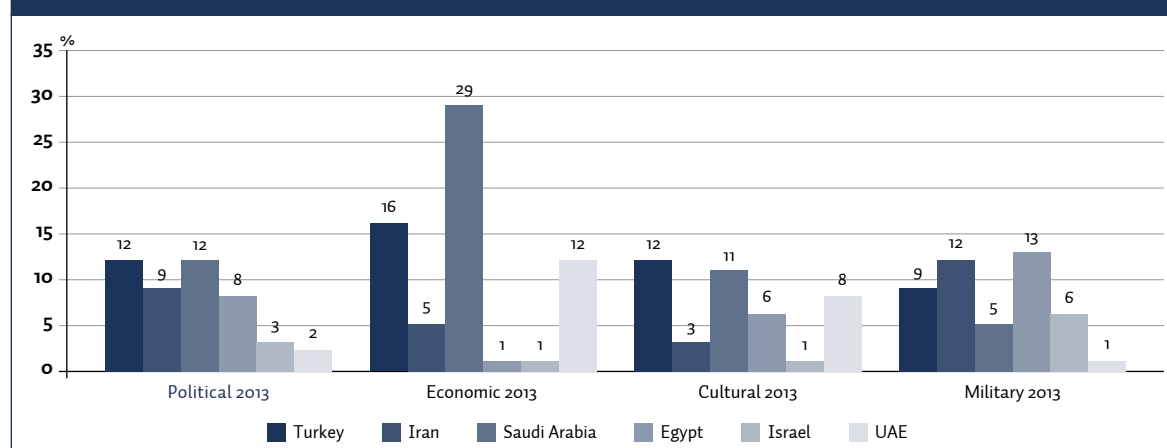


FIGURE 9: DO THE FOLLOWING COUNTRIES PURSUE SECTARIAN FOREIGN POLICY?

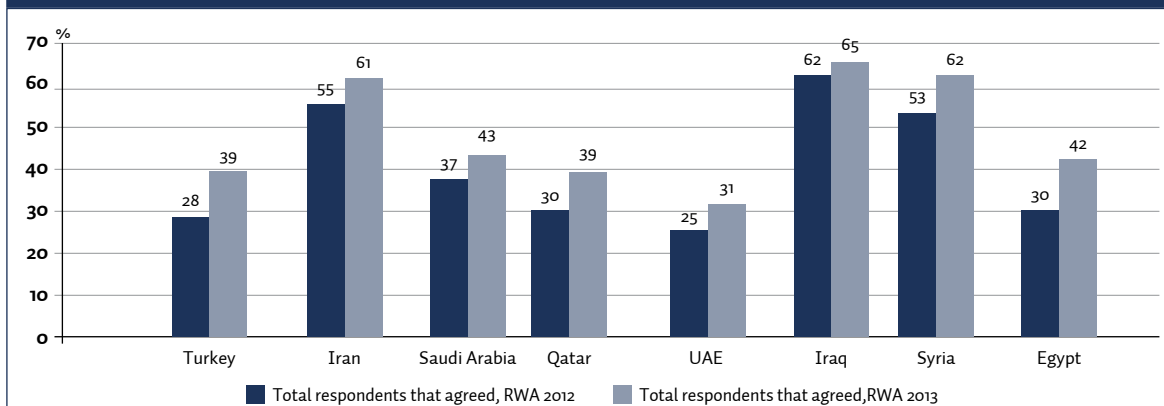
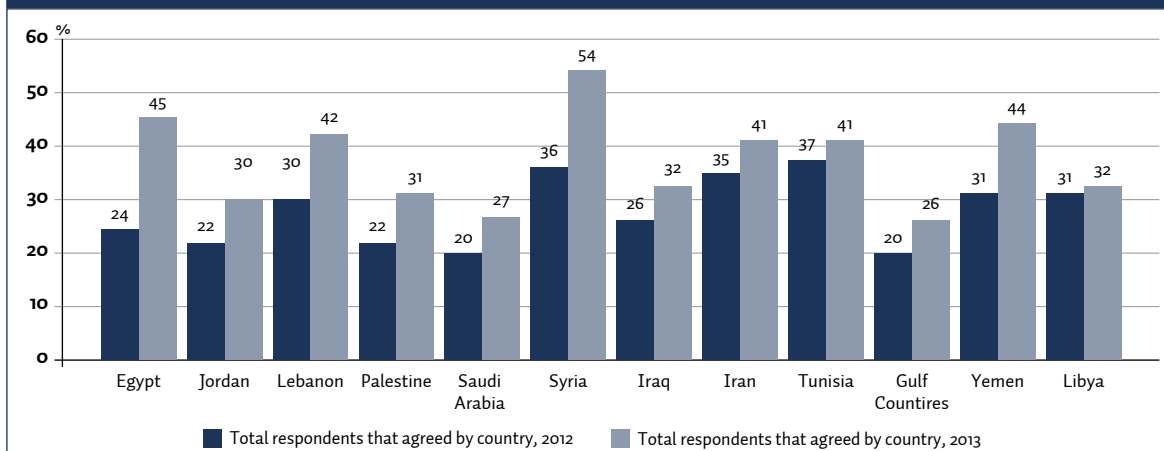


FIGURE 10: DOES TURKEY PURSUE SECTARIAN FOREIGN POLICY? COUNTRY-BY-COUNTRY RESPONSES



43% of respondents state that Saudi Arabia’s foreign policy is sectarian in nature; 42% say the same for Egypt, and 39% each for Turkey and Qatar. The United Arab Emirates is least commonly perceived as engaging in sectarian foreign policy (31%) among these eight countries. Compared to 2012, the findings reveal that there has been an 11 percentage point increase in the perception of Turkey as a country pursuing sectarian foreign policy.

Based on the country by country responses in Figure 10, it is possible to state that the number of respondents who think Turkey engages in sectarian foreign policy has increased particularly in Egypt and Syria: 54% of respondents from Syria and 45% from Egypt regard Turkey’s politics as sectarian. Albeit at

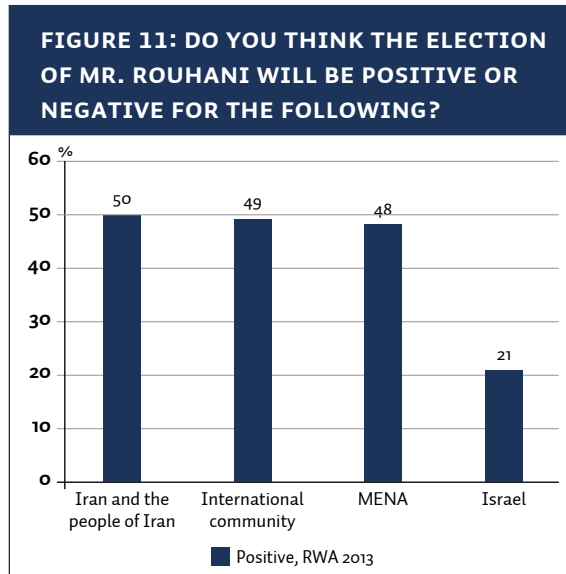
lower rates, there is also an upsurge of this view in other countries.

A close analysis of responses pertaining to Iran indicate that except for Syria and Iran itself, at least 65% of participants from all other countries are of the opinion that Iran pursues a sectarian foreign policy. A comparable rate applies for Iraq, with over 63% of participants overall viewing the country’s policy as sectarian except for Syria (where the rate is at less than 50%). In Yemen, Iraq’s foreign policy is perceived as sectarian with as much pervasiveness as 86%.

Syria’s foreign policy is considered sectarian by over half the respondents in all survey countries, except for Syria itself where the in-country assessment remains at 17%.

IRAN

Participants were questioned about their perception of Iran's nuclear program as in previous years, and in addition they were also asked to comment on the newly elected president Rouhani in this year's survey. Opinions on President Rouhani and the nuclear program are presented in Figures 11 and 12.



50% of respondents regard the election of Rouhani as president as a positive development for Iran and its people. 24% think his election will not create a significant difference, and 10% say that it will have a negative impact. In terms of responses specifically from Iran, 77% view Rouhani's election as promising for their country and themselves. Only 1% believes the situation in the country will get worse under his presidency.

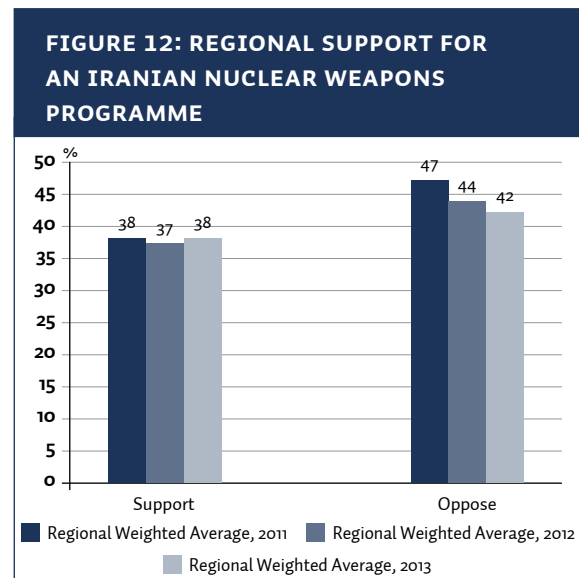
Following respondents from Iran, those who most welcome the election of Rouhani for the country and its people are participants from Syria (54%), whereas respondents from Jordan regard this as a positive development at the lowest rate with 29%. When the same question is posed in terms of how Rouhani will impact the region, 48% of respondents overall anticipate a positive impact; 25% say he will not make a difference, and 13% think he will have a negative influence. 80% of the participants from Iran view Rouhani's presidency as a positive development for the

region. Saudi Arabia (25%) and Jordan (27%) are the two countries where his presidency is ranked least commonly as an improvement for the region. In both, the majority think that it will not result in a noteworthy change.

Depicting a similar trend, 49% of respondents overall believe that the election of Rouhani will have a positive impact on the international community. However, when asked about how this presidency will affect Israel, while 21% of respondents think it will have a positive impact, 31% say the opposite. Only 16% from Iran are of the opinion the new president is better for Israel. The largest group of participants who foresee a positive impact for Israel after Rouhani's election is in Iraq (45%).

Regarding Iran's nuclear weapons program, the findings are comparable to those of 2012. While 38% of respondents support the idea, 42% oppose it. 49% of participants from Iran are supportive of the program, 35% remain undecided, and 11% are against the development of nuclear weapons. In 2012, the rate of those opposing the nuclear program in Iran was at 35%, so it can be asserted that the opposition to nuclear weapons in the country has decreased over the last year.

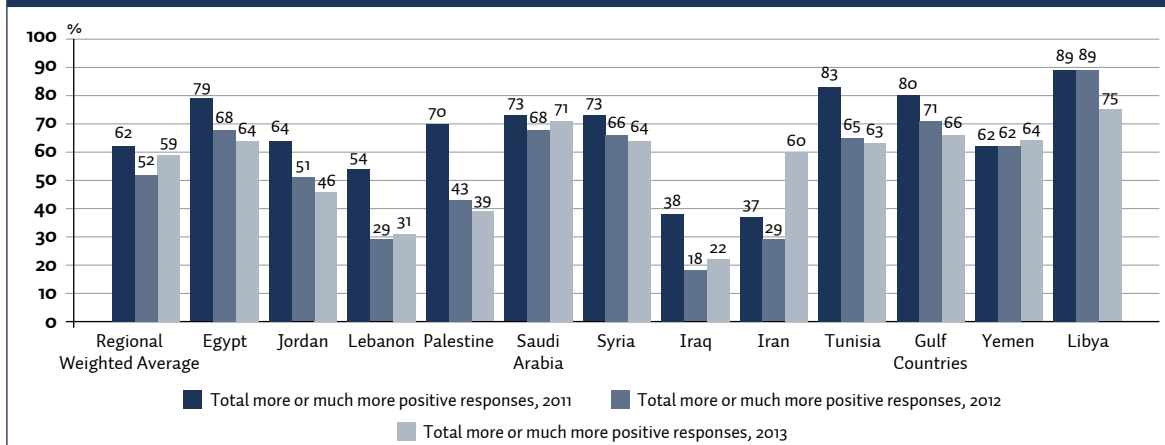
The most prevalent support for Iran on this issue is from Syria with 59%, at a higher rate than in Iran itself. The highest rate of opposition to the nuclear weapons program emerges in Saudi Arabia at 74%.



Section 2

A Region in Transition

FIGURE 13: GIVEN THE RECENT EVENTS IN THE MIDDLE EAST AND NORTH AFRICA, DO YOU FEEL MORE OR LESS POSITIVE ABOUT THE FUTURE? COUNTRY-BY-COUNTRY RESPONSES



Since 2011, participants are asked questions that can shed light on their perceptions regarding the ongoing changes and crises in the Middle East in scope of the research. The first of this series of questions pertains to their outlook of the future. As can be seen in Figure 13, 59% of the participants are hopeful about their future, which demonstrates a 7 percentage point increase compared to 2012. This rise in the regional average can largely be explained by the sway of the responses from participants in Iran.

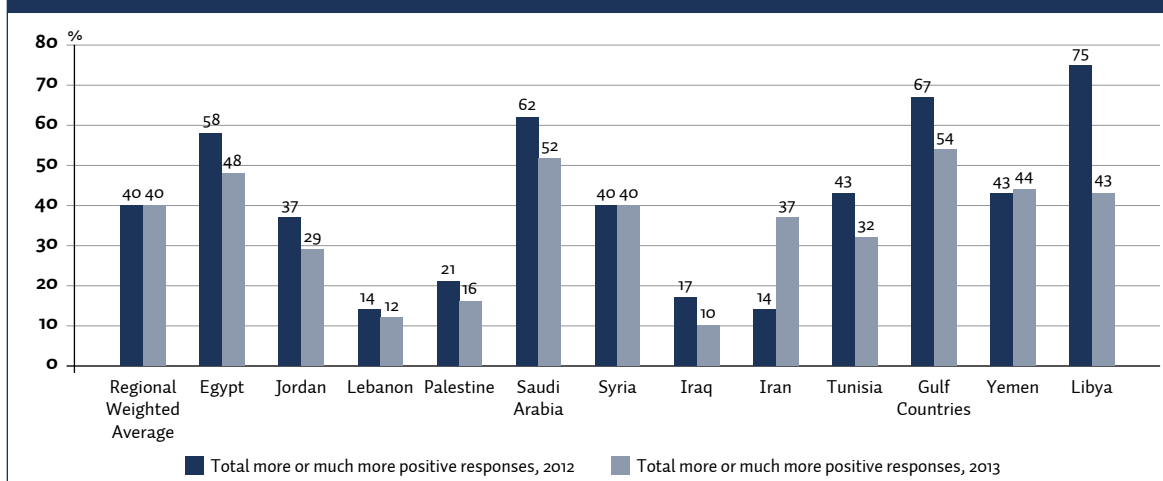
While in 2011 and 2012, 37% and 29% of participants expressed hope for the future in Iran respectively, in 2013 this rate has rocketed up to 60%, making Iran the only country out of the 16 where a positive future outlook is on a swift upsurge. Even though there is no similarly radical positive shift, it is also possible to note an increase in hopefulness by 2 percentage points in Yemen, 3 in Saudi Arabia, and 4 in Iraq.

It is striking that despite the enduring chaos and scale of the humanitarian crises in Egypt and particularly in Syria, participants from these countries remain hopeful. 64% of respondents from both countries express hope regarding the future. Hope is most widespread among participants from Libya (75%), while the majority of respondents in Saudi Arabia (71%) are also positive looking forward.

As in 2012, respondents from Iraq are those who are least hopeful about the future with 22% expressing positive expectations. Participants from Lebanon and Palestine do not indicate an optimistic outlook either, with 39% and 36% respondents from the respective countries conveying hope for the future.

When asked to compare the situation in their countries in 2013 and 2012, the regional average indicates that 40% of the participants regard the current year as better than the previous one. This rate was the same when the question was posed in 2012.

FIGURE 14: COMPARED TO 12 MONTHS AGO, DO YOU FEEL MORE OR LESS POSITIVE ABOUT YOUR COUNTRY'S CURRENT SITUATION?



Participants from Lebanon and Palestine are those who most pervasively assess the situation in their countries as worse compared to last year. 81% of respondents from Lebanon and 73% from Palestine indicate things have taken a more negative turn. The most significant shift in this particular category is in responses from Libya: while 75% in Libya responded things had improved over the last year in the 2012 survey, in 2013 the positive response rate has dropped to 43%.

Iran is the only country where the number of those who find the current situation more positive is on the rise when 2012 and 2013 findings are compared. While in 2012 14% thought the present circumstances were better, this rate is as high as 37% in 2013.

The regional average of responses pertaining questions on the Arab Spring reveal that this period is regarded as a positive development on the country level by 37% of the respondents. The findings throughout the last three years suggest that gradually the perception of the Arab Spring is becoming more negative. There is a 15 percentage point downward shift between the 2011 and 2013 results.

As Figure 15 illustrates, the country which stands out among the findings on the Arab Spring is Iraq. Only respondents from this country report a higher rate of positive impact for their home-country in 2013 compared to previous years, with an increase from 23%

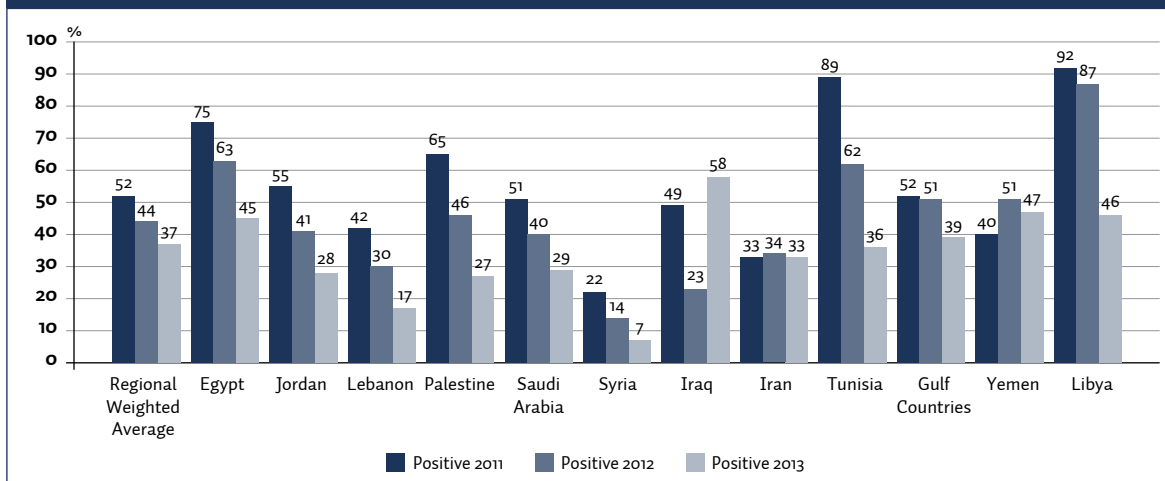
in 2012 to 58% in 2013. The positive perception rate of the impact of the Arab Spring is on the decline in all the countries except for Iraq. The sharpest negative trend is in Libya: while previous rates of positive opinion were at 92% (2011) and 87% (2012), in 2013 only 46% still think that the Arab Spring has a positive influence on Libya.

Tunisia displays a similar negative trend. In 2011, 89% of respondents regarded the Arab Spring as a positive development for their country, while this rate has dropped to 62% in 2012 and 36% in 2013. Egypt, Jordan, and Palestine are also countries in which positive perception prevalence has rapidly declined. Participants from Syria are the ones who regard the impact in the most negative light, with only 7% expressing a positive opinion.

The findings remain unchanged across the region when the question is asked in terms of the Arab Spring's impact on the Middle East. 37% of participants overall regard the impact as positive, and 50% as negative.

The most widespread positive response rate to this question emerges in Iraq. 64% believe the Arab Spring has had a positive impact on the region, whereas in 2012, this rate was at 33%. In Syria, the Arab Spring's regional impact is regarded rather negatively; only 10% of respondents view it as a positive development for the region.

FIGURE 15: THE EFFECT OF THE ARAB SPRING ON THE RESPONDENT'S COUNTRY, COUNTRY-BY-COUNTRY RESPONSES



The opinion in Libya displays a negative trend when compared to last year. While 77% thought that the Arab Spring affected the region positively in 2012, 42% express a positive view this year. As presented in Figure 16, a drop from 56% to 29% can also be observed in Tunisia.

Another question posed to respondents in the survey pertained to the role of certain actors during the Arab Spring. Figure 17 delineates the response rates comparatively for nine countries. Qatar (39%), China (38%), Russia (38%), and Turkey (37%) are perceived to have a positive effect on the process at almost the

same rates. However, considering the evaluation of these countries over the three year period, the positive perception rate of Turkey has declined, while Russia and China are regarded more positively compared to the previous years.

Saudi Arabia is considered to have played the most positive role in the Arab Spring with 47%. In 2012, 45% of the participants had also answered Saudi Arabia and Qatar in response to this question. NATO is perceived as the most negative actor at 23%. It is followed by the USA, Italy, the UK, Germany, and France respectively.

FIGURE 16: THE EFFECT OF THE ARAB SPRING ON THE REGION, COUNTRY-BY-COUNTRY RESPONSES

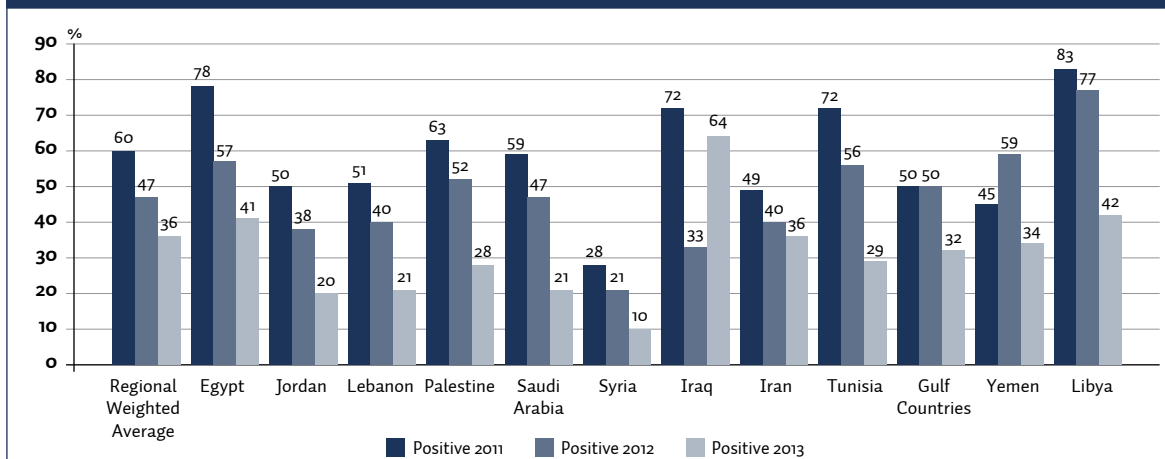
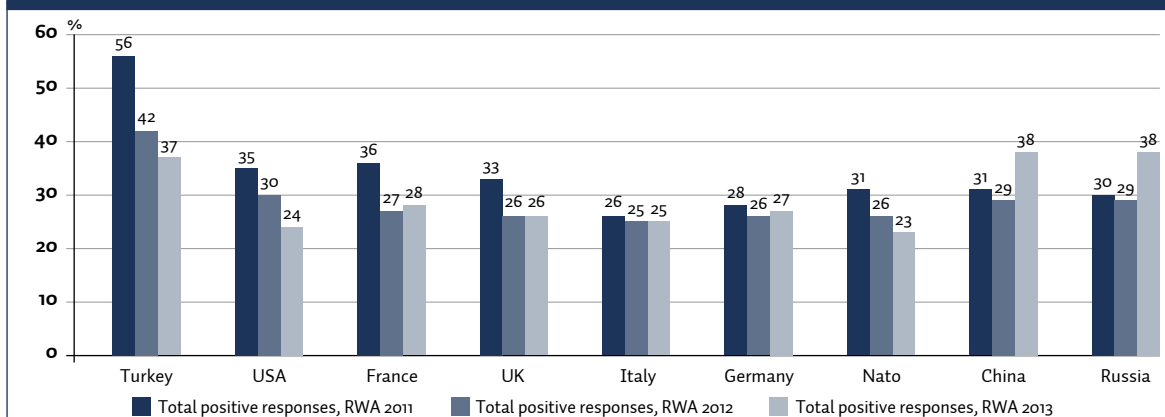


FIGURE 17: DO YOU THINK THE FOLLOWING ACTORS HAVE HAD A POSITIVE OR NEGATIVE EFFECT ON THE ARAB SPRING?



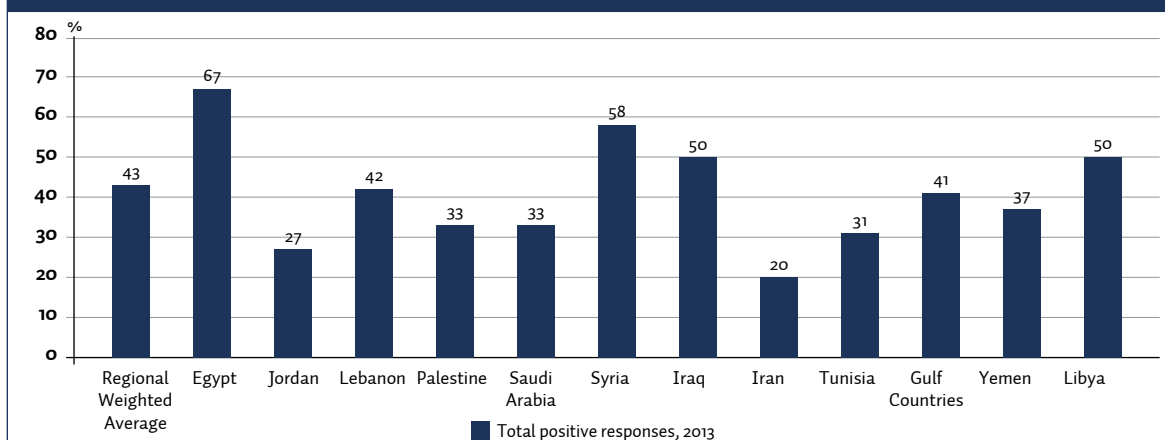
The assessment of Turkey reveals a 19 percentage point drop in the period between 2011 and 2013. The responses from Egypt have had an impact on this negative trend. While 67% of respondents from Egypt held a favorable opinion of Turkey's role in 2011, this rate dropped to 50% in 2012 and then to 37% in 2013. Libya is the country where Turkey's role is most prevalently regarded as positive (76%).

While participants from Syria regard all other actors as negative influences, they see China (66%) and Russia (65%) as positive actors. China and Russia's positive perception rates have increased by approximately 20 percentage points in Egypt as well. Meanwhile, those who regard the US as an enabling influence in Egypt have decreased from 39% to 21%.

Asked about the military coup in Egypt that took place on July 3rd 2013, 43% of the respondents across the region state that they support the coup, 7% remain undecided, and 46% do not support the intervention. The most extensive support for the coup is in Egypt itself; 67% think that this is good for the country. There is widespread support for the military intervention in Syria as well (58%), and 50% of respondents from both Iraq and Libya also express approval.

There is least extensive support for the coup in Iran. While 20% of the respondents support the intervention, 59% think it is a negative development for Egypt. There is a similarly high rate of objection to the coup in Jordan (67%) and Tunisia (62%). In Saudi Arabia, while 58% disapprove, 33% of the participants are supportive of the coup.

FIGURE 18: THE MILITARY COUP'S EFFECT ON EGYPT



Section 3

Turkey and the Middle East

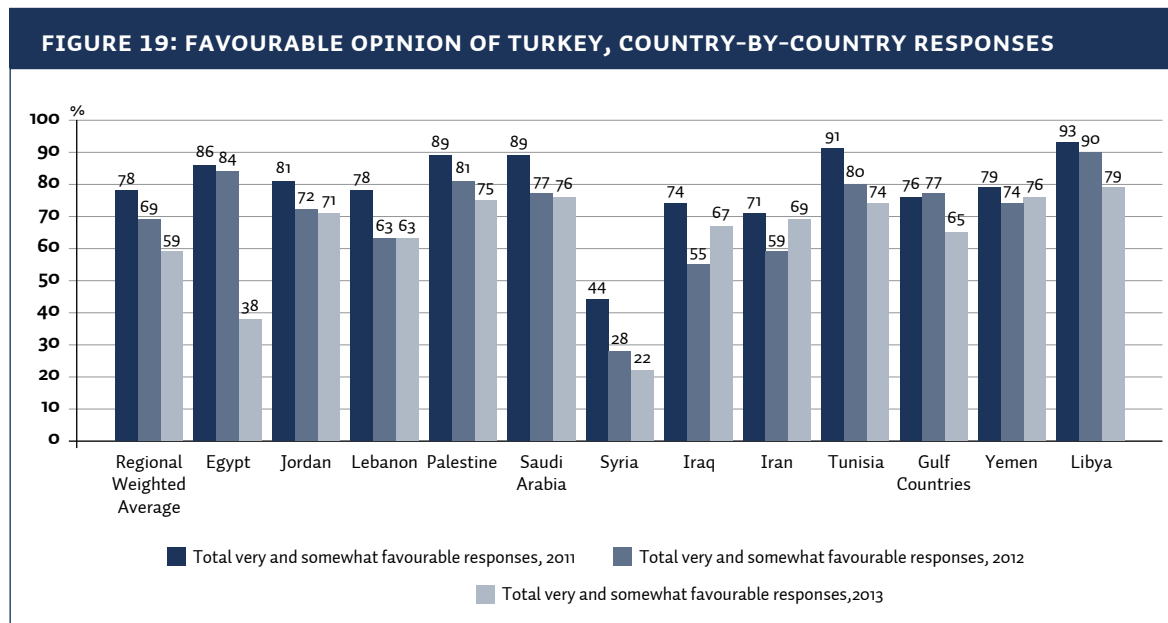


Figure 19 provides a three-year comparison of how Turkey is perceived in the 16 survey countries. The first section outlined findings on how Turkey and other actors are perceived by respondents. As noted above, participants' positive perception rate of Turkey has decreased by 19 percentage points over the last three years.

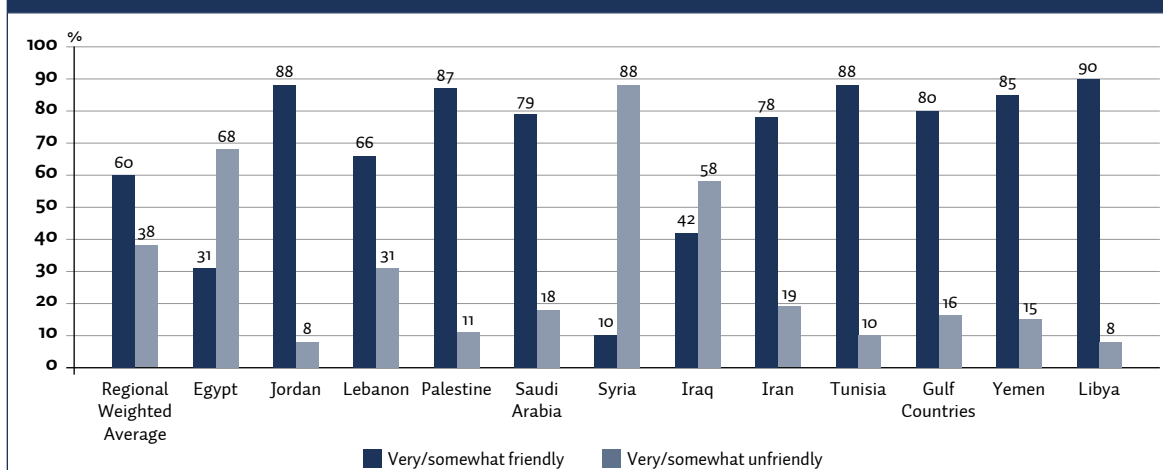
The most significant shift in perception between 2012 and 2013 has occurred in respondents from Egypt, as detailed in Figure 19. While the findings in 2012 reveal a rather prevalent rate of positive perception of Turkey in Egypt at 84%, in 2013 this rate has dropped by 46 percentage points to 38%. It is possible to deduce that the recent developments in Egypt after July 2013 and Turkey's response and attitude have influenced perception in Egypt.

In addition to Egypt, the rate of Turkey's positive perception has also declined in Palestine, Syria, Tunisia, the Gulf Countries and Yemen. At 22%, positive opinion of Turkey is least prevalent in Syria.

On the other hand, research findings reflect that participants in Iran and Iraq have more widespread positive opinion of Turkey compared to 2012. While last year, positive perception of Turkey was at a rate of 55% in Iraq, it has increased to 67% in 2013. Similarly, whereas this rate was 59% in Iran in 2012, 69% of respondents from the country express a favorable opinion in 2013.

With the exception of Syria and Egypt, participants from all the other countries continue to maintain a positive perception of Turkey in 2013.

**FIGURE 20: HOW FRIENDLY IS THE GOVERNMENT OF TURKEY TO YOUR GOVERNMENT?
COUNTRY-BY-COUNTRY RESPONSES**



Following the previous question, participants were asked to comment on how friendly they found the government of Turkey in relations to their own countries. The responses portray parallel inclinations. Region-wide, 60% think the government of Turkey acts in a friendly manner to their governments; 38% think that it is adopts an unfriendly approach.

The rate of those who think the government of Turkey is not amicable is highest in Syria, with 88% of respondents stating they find Turkey’s government unfriendly to their own administration. Likewise, 68% of participants from Egypt think that the government of Turkey is unfriendly, even though in 2012 only 8% from the country was of this opinion. Iraq is another country where the government of Turkey is not regarded as a friendly one. 58% think that the government of Turkey adopts an unfriendly attitude towards their government.

Libya (90%), Tunisia and Jordan (88%), Palestine (87%), and Yemen (85%) are countries where participants most pervasively find Turkey to be amicable. Similarly, respondents from Iran express positive opinions at 78%. This rate indicates an increase of 10 percentage points compared to 2012.

Throughout the region, the government of China is viewed as the friendliest government (80%). In 2012,

the rate of those who found China’s government amicable was at 70%. Participants from all 16 countries where the survey was conducted in 2013 identify China as a friendly government.

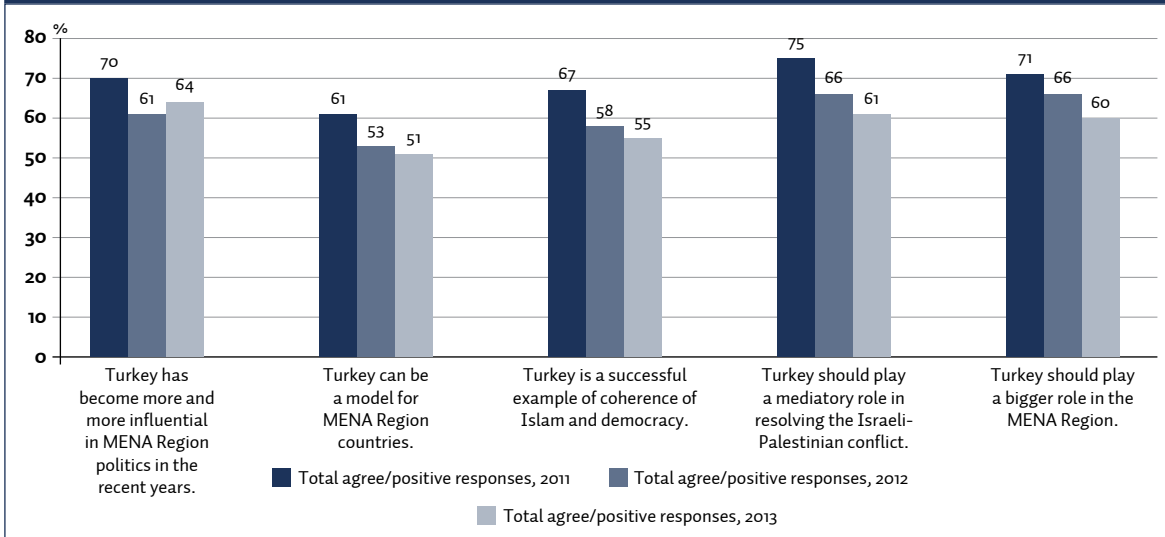
Russia follows China with 71%. The majority of respondents regard the government of Russia as amicable towards their own governments. Russia finds the least favorable opinion among survey countries in Libya (51%) and Saudi Arabia (52%).

As in 2012, NATO and the USA emerge as the least friendly actors to governments in the region in 2013. The most negative assessment comes from Syria: 86% of respondents find the USA and 80% NATO unfriendly towards their government.

Figure 21 comparatively depicts responses to the question on Turkey’s role in the Middle East in the three year period between 2011 and 2013. Except for slight variances in county-by-country responses, region-wide findings are parallel to those of 2012.

64% of respondents think that Turkey is becoming more and more influential in the region. This rate was 70% in 2011, and 61% in 2012. When 2012 and 2013 country responses are compared, it is possible to note that only participants from Egypt have changed their opinion in a negative fashion. While 73% in Egypt

FIGURE 21: TURKEY'S ROLE IN THE MIDDLE EAST



stated Turkey was gradually becoming a more prominent actor in the region in 2012, 60% maintain the same opinion in 2013. In all other countries including Syria, the perception of Turkey's increasing role in the region is on the rise.

The regional support for Turkey playing a bigger role in the Middle East is at 60%. Again considering the three-year findings, this rate represents a gradual decline. While it was at 71% in 2011, it dropped to 66% in 2012. Respondents from Egypt, Syria, Gulf Countries

and Libya are less supportive of Turkey becoming more influential in the region compared to 2012.

The most widespread reversal in opinion is in Egypt. While in 2012 74% of respondents from Egypt thought Turkey should play a more prominent role in the region, in 2013 only 47% are of the same view. In Syria, the affirmative response rate has dropped from 39% in 2012 to 33% in 2013. There is a slight decline in support for the proposition in Gulf Countries as well. In Libya, the rate of support for Turkey's increased role has dropped from 75% to 62%.

FIGURE 22: DO YOU AGREE WITH THE FOLLOWING STATEMENT? "TURKEY CAN BE A MODEL FOR MENA REGION COUNTRIES"

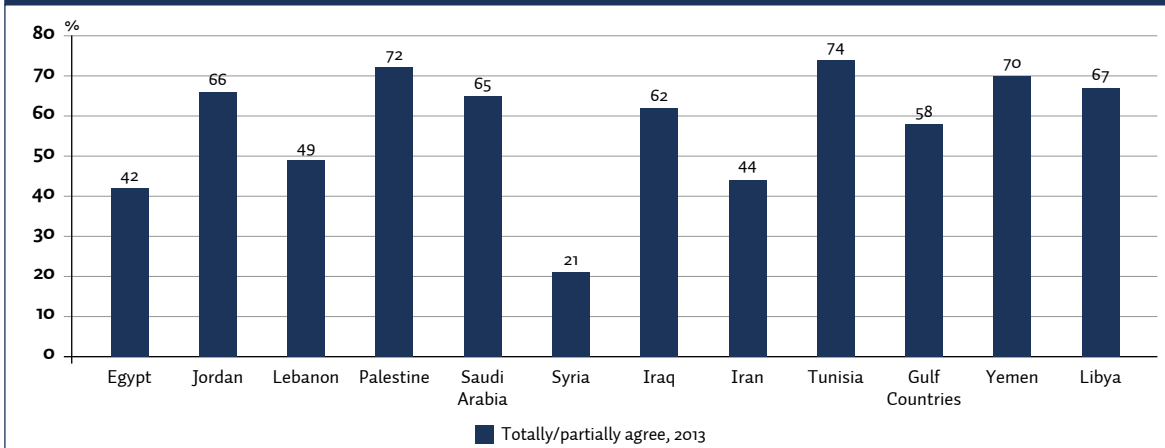
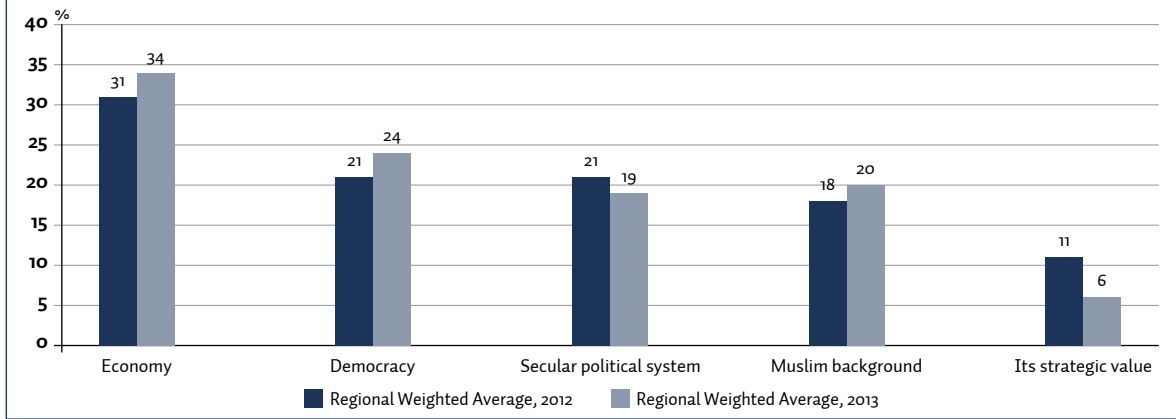


FIGURE 23: WHY TURKEY CAN BE A MODEL?



Turkey acting as a mediator in the Israeli-Palestinian conflict draws support at 61% across the region. Although there is a decrease of 5 percentage points in the overall rate, it is fair to say that significant region-wide support persists. Only participants from Syria do not support Turkey playing a mediating role (62%). There is also a drop from 75% to 53% in Egypt. Participants from Palestine are the most welcoming of Turkey’s role as a mediator at 79%, and in all other countries, the approval rate remains at 60% or higher.

55% of the participants are of the opinion that Turkey is a successful synthesis of Islam and democracy. The rate of respondents who agree with this statement has increased overall, except in Egypt and Syria. While the percentage of accord in Syria remains unchanged, in Egypt once again it is possible to observe a decline: the

percentage of those in agreement with the statement has dropped from 80% in 2012 to 49% in 2013.

Another recurrent question of the research is whether Turkey can be a model for the Middle East countries. In 2013, 51% of respondents are of the opinion Turkey can be a model for the region, 14% are undecided, and 34% say it cannot. Opinions of participants from Egypt, Lebanon and Libya appear to have changed negatively. In Libya and Lebanon, there is a decrease of 4 percentage points in affirmative responses, whereas in Egypt the number of respondents who think Turkey can be a model has decreased considerably, from 67% to 42%.

Participants who responded positively to the question whether Turkey can be a model for the region’s

FIGURE 24: WHY TURKEY CANNOT BE A MODEL?

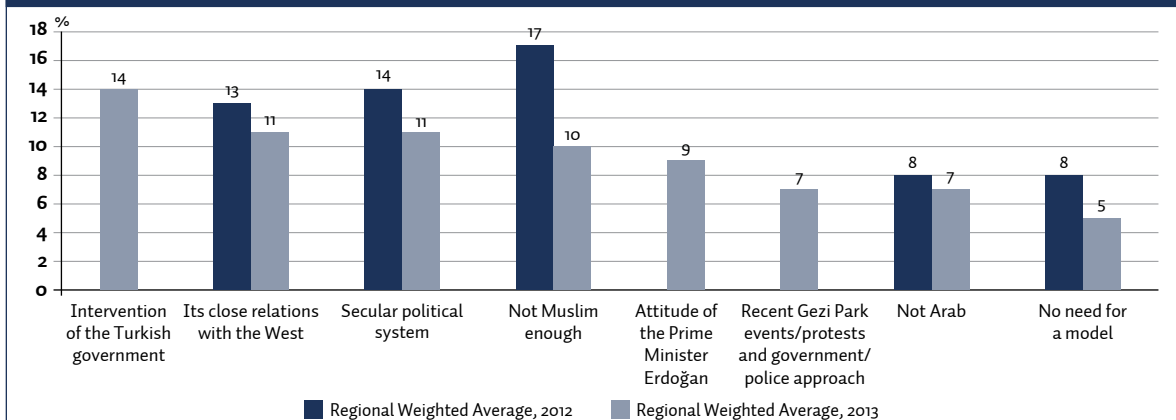
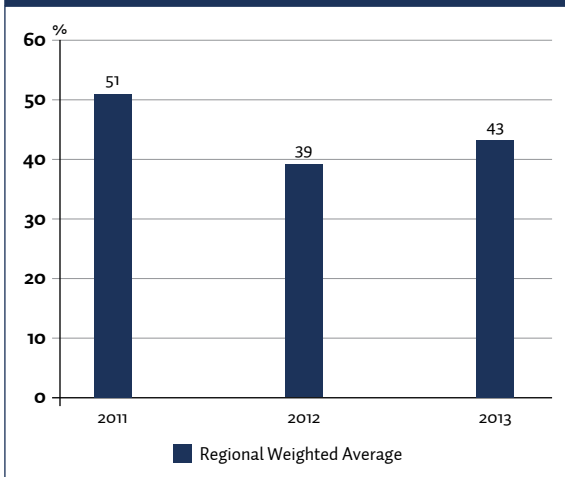


FIGURE 25: SUPPORT FOR TURKEY'S EU ACCESSION

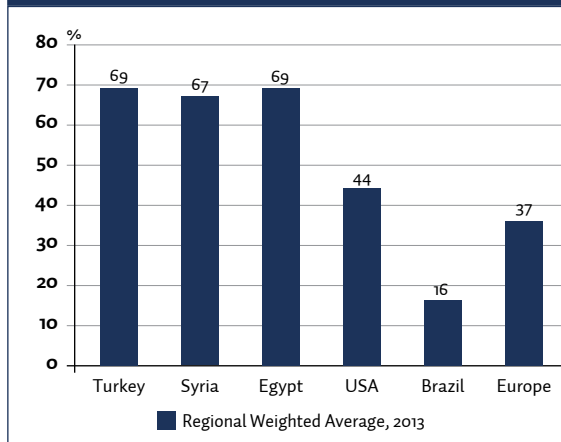


countries were asked the reason why they think it can present a model. The most common response in both 2012 and 2013 is the economy. The second most cited reason is the democratic regime in Turkey. Its Muslim identity and secular political system also emerge as determining factors. Turkey's strategic value has lost weight compared to 2012 and obtains a response rate of only 6%.

Participants from Lebanon and Syria state the democratic regime as the primary reason for regarding Turkey as a role model in the region. While respondents from Saudi Arabia commonly highlight the fact that Turkey is a developed country, in all other countries the economy stands out as the main reason why Turkey can serve as a model.

When asked why Turkey cannot be a model, those who responded negatively to the previous question cite Turkey's interventionism as the primary reason, followed by its secular political system and close ties with the West both at second place. Turkey's not being Muslim enough comes up as another influential factor at a comparable rate. When findings are examined in comparison to 2012, it is apparent that the recent developments in Turkey have influenced the responses and participants are alluding to previously unmentioned reasons.

FIGURE 26: HAVE YOU EVER WATCHED A TV SERIES FROM THE FOLLOWING COUNTRIES?



With regard to Turkey's EU accession process, the most adverse reaction comes from Syria where 46% of respondents do not support Turkey's membership to the EU as opposed to the 26% who do. Also in Iran and Egypt support for Turkey's EU accession is low (36%). Support for the process is most extensive in Libya at 62%, Tunisia and Palestine at 60% each.

Another question in scope of the research pertains to the popularity of TV series from Turkey throughout the region. The consistent popularity of TV series produced by Turkey has been reflected in the survey findings since the first time the research was conducted in 2009. Turkish TV series continue to receive high viewer ratings in the region in 2013. 69% of the respondents report watching Turkish and Egyptian TV series, while series from Syria are also popular among participants with a 67% viewer rating. Turkish TV series are most popular in Iraq (82%) and Iran (77%), whereas they are least watched in Syria with 55%.

TV series from the USA rank fourth at 44% and are watched most commonly in Iran (59%). 37% of respondents overall watch European TV series, which are once again most popular in Iran with a 60% viewer rating. Brazilian TV series are watched by a smaller audience compared to others.

TURKEY AND DOMESTIC POLITICS

The survey also included some questions on recent social and political developments in Turkey. The first of these pertained to respondents' awareness and perceptions of the protests in Turkey, which started at Istanbul Gezi Park in June 2013 and spread throughout the country. 71% of the participants indicated that they have been following the protests commonly referred to as the Gezi Park resistance and the subsequent developments.

While over 60% of respondents from all countries except for Iran report that they are aware of the protests, the awareness is at a relatively lower rate in

FIGURE 27: GEZI PARK EVENTS/PROTESTS

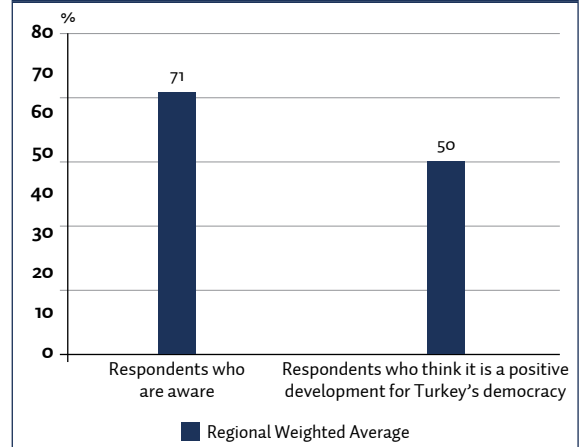
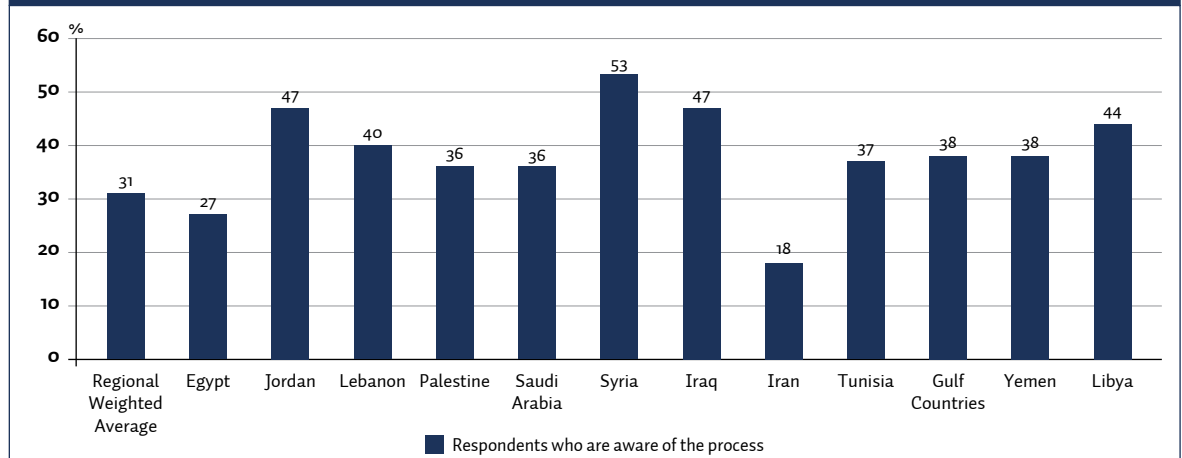


FIGURE 28: ARE YOU AWARE OF TURKEY'S KURDISH PEACE PROCESS?



Iran at 18%. As a follow up question, when respondents were asked to evaluate⁶ the recent developments in terms of democracy in Turkey, 50% stated they regard the process as positive in terms of democracy, while 45% do not agree. Participants from Iraq find the developments most promising for democracy in Turkey at 67%. In other countries the response rates range close around 50%.

Another current topic that is addressed in the survey is the peace process initiated with the aim of resolving

the Kurdish issue in Turkey. As in the previous question, respondents were first asked whether they are aware of the peace process or not. 31% of participants in the region overall responded that they know about process, with the rate being highest among respondents from Syria at 53%. 47% in Iraq and Jordan say that they are following the process. There is least awareness of the issue in Iran at a rate of 18%.

85% of the respondents who are aware of the issue also express support for the peace process. Even though the rate of regional awareness is not very high, there is significant support among those who follow the process. Support is at a relatively low rate in Iran with 71%.

⁶ This question was asked to the 71% who stated they were aware of the Gezi Park protests.

FIGURE 29: DO YOU SUPPORT TURKEY'S KURDISH PEACE PROCESS?

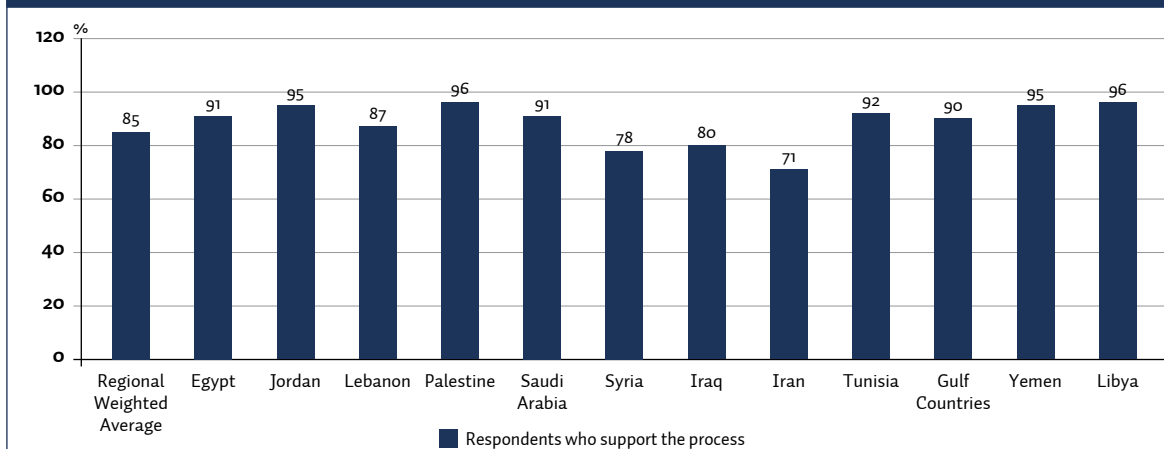
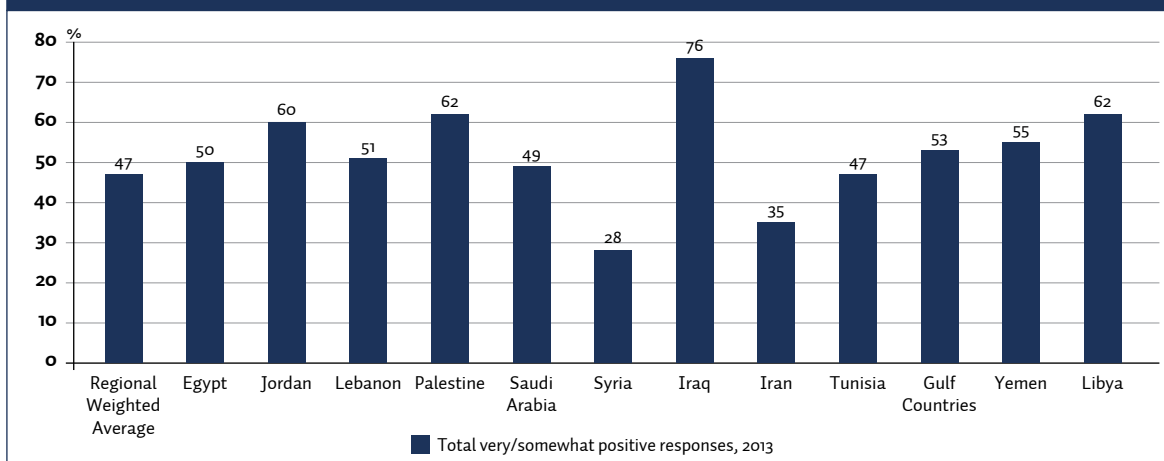


FIGURE 30: ISRAELI PRIME MINISTER NETANYAHU'S APOLOGY FROM TURKEY



The final question in this section pertained to Turkey-Israel relations. Following the May 2010 Mavi Marmara crisis and subsequent strained relations between the two countries, in March 2013 Israeli Prime Minister Netanyahu apologized to Turkey. When asked about the impact of the apology on Turkey's role in the region, 47% the participants responded it had a positive impact, 25% thought it was bad for Turkey, and 16% said they were undecided.

Respondents who do not think the apology had a positive impact for Turkey's role in the Middle East are in the majority in Syria with 46%; 28% in this country regard this as a positive development. Iran is the

other country where respondents do not find the apology particularly helpful: while 35% think it is a positive development, 16% disagree and 30% remain undecided.

Iraq is the country where the number of respondents who think the apology is an advantage for Turkey is the highest (76%). In Palestine, 62% think that the aforementioned apology is a positive development for Turkey.

Concluding Remarks

As we previously noted, when we first launched this research five years ago, the findings came as a surprise to us. While we predicted Turkey's image in the Middle East had changed, we did not anticipate that it would be so positively perceived across the region. The following year we saw that positive perception rates had gone even higher, yet in the subsequent years we witnessed declines.

In 2013, while this downward trend continued in Syria, it also emerged in Egypt. Despite oscillations in levels of sympathy due to conjunctural factors and foreign policy preferences, Turkey has attained a positive image in people's minds throughout the region and has become an actor of prominence in the wider Middle East region.

Once again, we would like to allow for readers to interpret the research findings themselves and draw their own conclusions. Therefore, we did not make any projections beyond the statistical analysis and internal evaluation of the data or offer hypotheses on causality relationships. However, we can assert that Turkey has created a brand value in the region and should work to preserve this value.

Perhaps Turkey will not be able to turn this stature into an advantage that can affect the turn of events in the region. Nevertheless, drawing from the sympathy it enjoys, its perception as a model country and the expectation for it to play a greater regional role, it can contribute to the stability and welfare of the region. Turkey's image in the Middle East is also a resource it can benefit from in its relations with other countries and regions.

We would like this study to serve as a resource for researchers and for the data we collected to be analyzed and interpreted. We hope that the findings of this survey, alongside the previous studies, will contribute to research on Turkey's foreign policy and its underpinning values, leading to the emergence of more accurate and well-grounded analyses.

Yet, as a think tank, our primary target group is decision makers. We particularly want them to benefit from this research series and make use of the data and findings. Our aim is not only to appeal to decision makers in Turkey. While Turkey is the focal point of the survey, the research is not on Turkey exclusively. As in previous years, we hope everyone interested in Turkey and the Middle East at large will benefit from the findings of our 2013 survey.

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 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 on August 15-September 13, 2013. The questionnaire consisted of 27 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, the United Arab Emirates, Yemen, and Libya): CATI fieldwork was realised by 33 trained interviewers who are native speakers of Arabic. The average length of a successful interview was 26 minutes; ranging from 15 minutes to 105 minutes. Households were selected by generating random numbers (last 4 digits) and respondents were selected using the Next Birthday method. During the fieldwork, there were 7153 contact attempts made. Of these, 2894 resulted in non-contacts, yielding a non-contact rate of 40.5%. Of the 4259 successful contacts, there were 2031 refusals giving the study a 52.3% response rate.

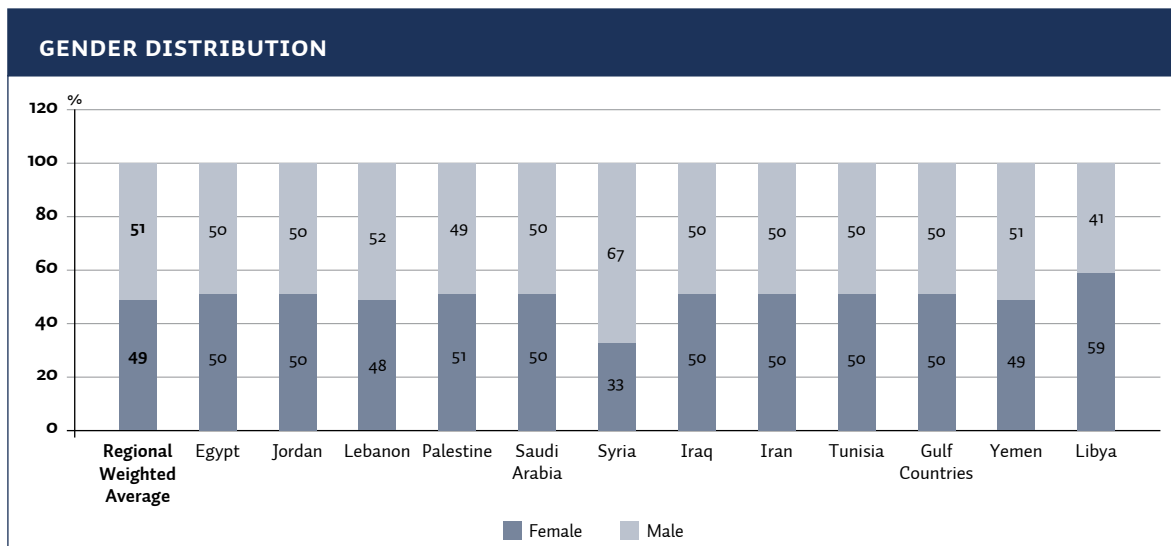
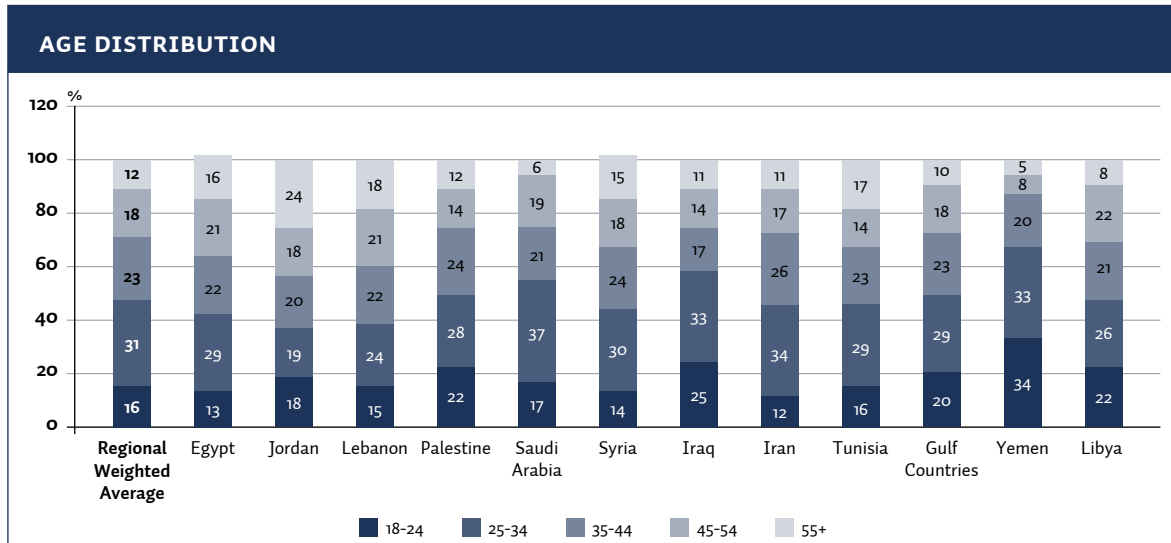
Iran: CATI fieldwork was realised by 11 trained interviewers who are native speakers of Farsi. The average length of a successful interview was 29 minutes; ranging from 15 minutes to 68 minutes.

Households were selected by generating random numbers (last 4 digits) and respondents were selected using the Next Birthday method. Regarding the response rate in Iran, there were 903 contact attempts made. Of these, 394 resulted in non-contacts, yielding a non-contact rate of 43.6%. Of the 509 successful contacts, there were 223 refusals giving the study a 56.1% response rate.

Iraq: F2F interviews were conducted by 29 trained Iraqi interviewers. The average length of a successful interview was 38 minutes; ranging from 30 minutes to 53 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 366 contact attempts made. Of these, 29 resulted in non-contacts, yielding a non-contact rate of 7.3%. Of the 337 successful contacts, there were 54 refusals giving the study an 86.2% response rate.

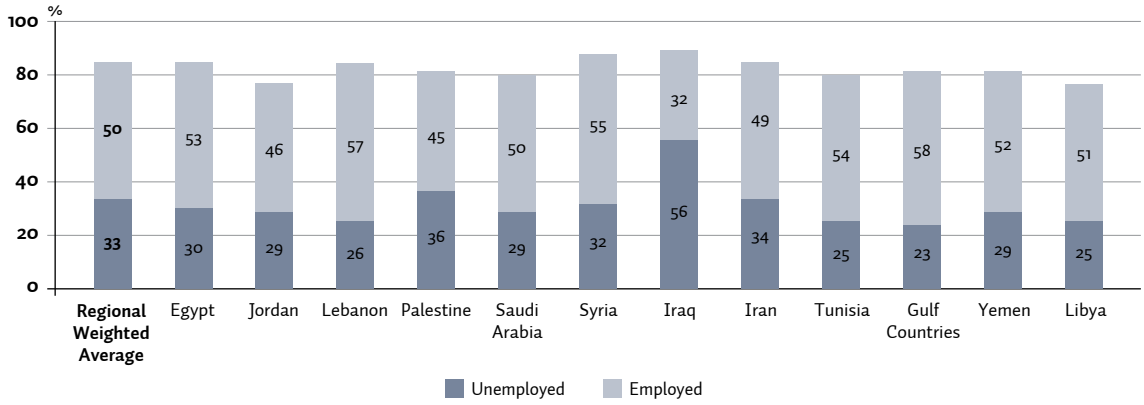
Country	Method	Fieldwork dates	Total population/ 18+ population	Sampling cities	Sample size	Weighting Factor
Egypt	CATI	15 August-13 September 2013	83,133,140/ 52,610,458	Cairo, Al Gizah, Alexandria, Ash Sharqiyah	240 adults aged 18+	3.07110
Jordan	CATI	15 August-13 September 2013	3,622,655/ 6,363,425	Amman, Irbid, Zarga, Balqa	283 adults aged 18+	0.17934
Lebanon	CATI	15 August- 13 September 2013	4,311,450/ 3,042,929	Jabal Lubnan (Mount Lebanon), Beirut, Bekaa, Al-Shamal (North)	235 adults aged 18+	0.18141
Palestine	CATI	15 August-13 September 2013	4,165,878/ 2,122,487	Nablus, Gaza, Jerusalem (Arabs only), Al-Khalil	286 adults aged 18+	0.10397
Saudi Arabia	CATI	15 August-13 September 2013	28,250,717/ 18,308,245	Aseer, Eastern Province, Mecca, Riyadh	256 adults aged 18+	1.00194
Syria	CATI	15 August-13 September 2013	29,906,756/ 12,013,123	Damascus, Aleppo, Homs, Hama	205 adults aged 18+	0.82099
Tunisia	CATI	15 August-13 September 2013	10,724,572/ 7,704,996	Tunis, Sfax, Sousse, Nabeul	243 adults aged 18+	0.44422
Yemen	CATI	15 August-13 September 2013	24,876,797/ 12,218,305	Al-Hudaydah, Hajjah, Sana'a, Ibb	143 adults aged 18+	1.19704
Libya	CATI	15 August-13 September 2013	6,464,263/ 4,171,491	Tripoli, Benghazi, Zawiya, Misrata	130 adults aged 18+	0.44955
Gulf Countries (Bahrain, Kuwait, UAE, Qatar, Oman)	CATI	15 August-13 September 2013	16,783,866/ 12,792,907	Manama, Kuwait, Abu Dhabi, Doha, Muscat	207 adults aged 18+	0.71261 0.65491 2.00610 0.91449 0.35392
Iraq	F2F	15 August-13 September 2013	32,810,344/ 16,732,021	Baghdad, Erbil, Basra, Anbar, Nineveh, Thi-qar	286 adults aged 18+	0.81963
Iran	CATI	15 August-13 September 2013	75,579,296/ 54,519,800	Tehran, Khorasan Rezavi, Esfahan, East Azerbaijan, West Azerbaijan, Ardabil	286 adults aged 18+	2.67068
Total	CATI/F2F	15 August-13 September 2013	323,370,504/ 199,859,417	53 Province/City	2800 adults Aged 18+	-

Demographics*

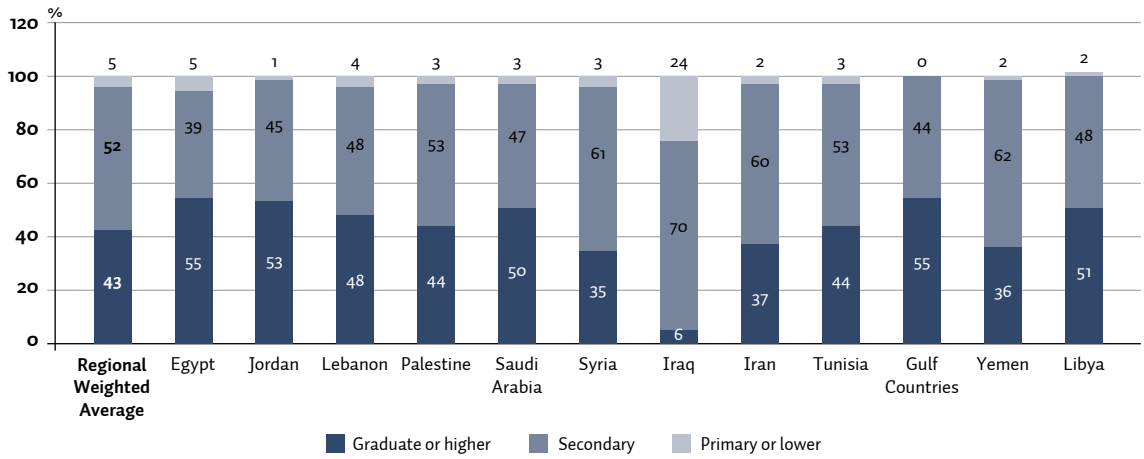


* Due to rounding not all percentages add up to 100%

EMPLOYMENT STATUS



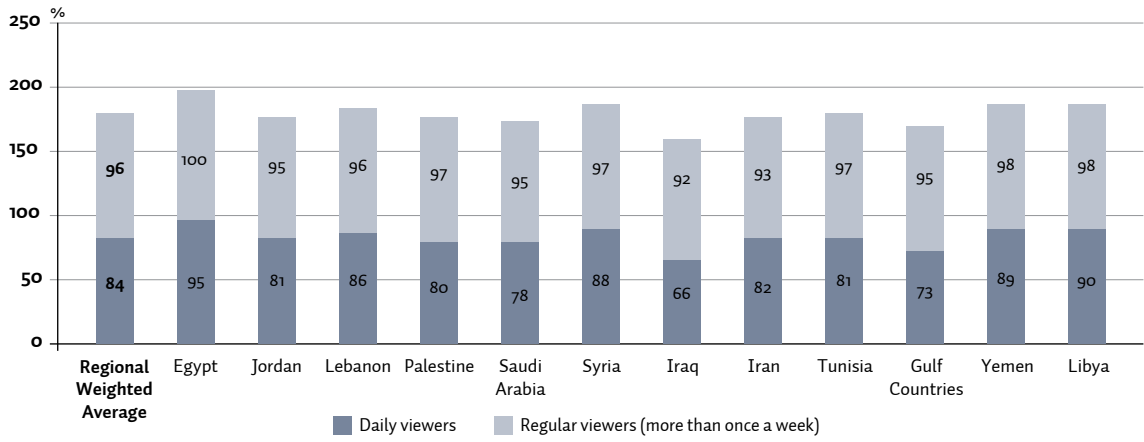
EDUCATION LEVEL



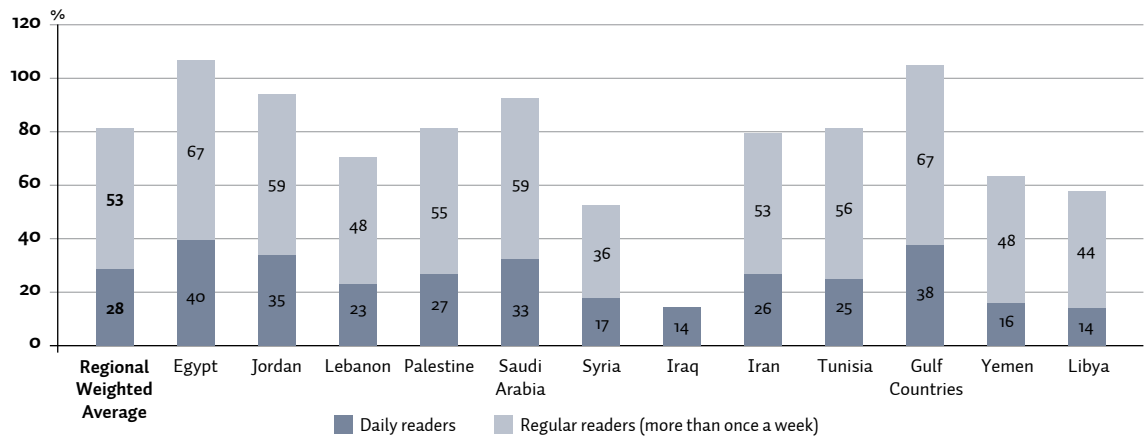
SOCIAL CLASS (BASED ON RESPONDENTS' CLAIM)



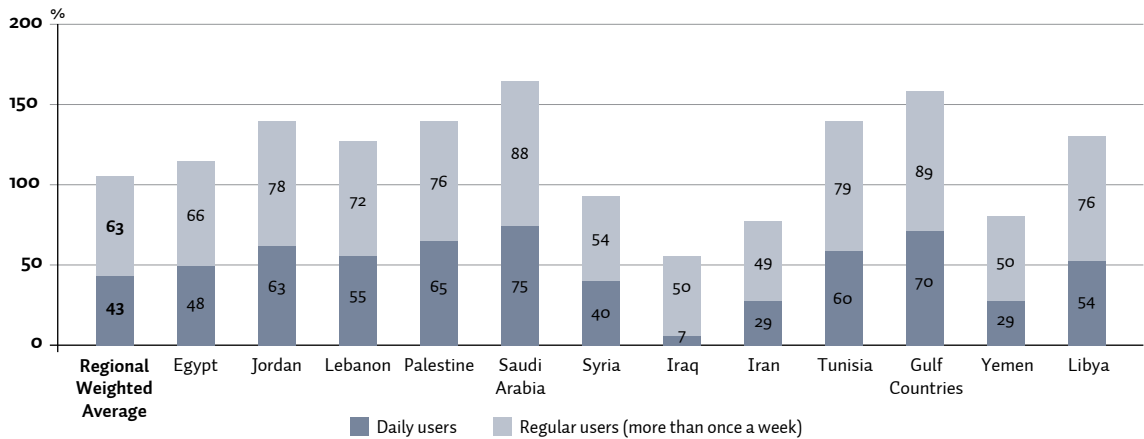
RESPONDENTS WHO WATCH TV



RESPONDENTS WHO READ NEWSPAPERS



RESPONDENTS WHO USE THE INTERNET





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