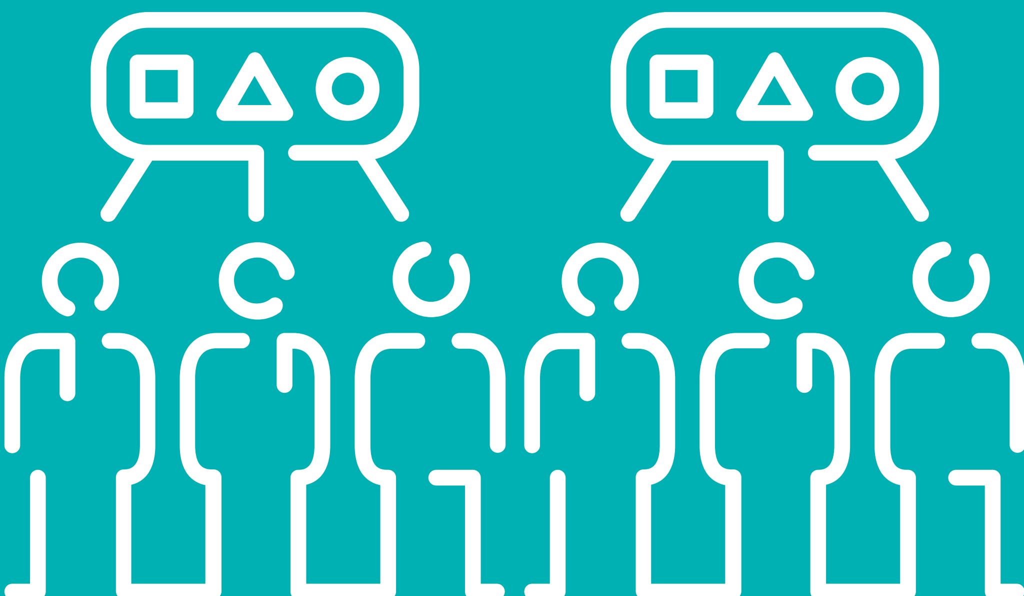
REGIONAL PROGRAM POLITICAL DIALOGUE SOUTH MEDITERRANEAN

KONRAD ADENAUER STIFTUNG

10 YEARS AFTER THE ARAB UPRISINGS:

WHERE DOES PUBLIC OPINION IN THE REGION STAND TODAY?



WWW.KAS.DE/POLDIMED

KONRAD ADENAUER STIFTUNG

FOREWORD

Ten years after the outbreak of the Arab uprisings that gripped much of the Middle East and North Africa in one form or another, the Regional Program Political Dialogue South Mediterranean of the Konrad Adenauer Foundation (KAS PolDiMed) is delighted to publish a survey that captures the opinions, sentiments and feelings of citizens in Algeria, Jordan, Lebanon, Libya, Morocco and Tunisia.

The last decade has affected each country in the region very differently, and yet the issues facing them in times of the global COVID pandemic unite them under a common challenge. Much has been said about the different paths countries have taken in the post-2011 era, but hope and optimism often fall by the wayside. The willingness of citizens to achieve tangible success and work for positive change only underscores the bright future for which the region is working tirelessly. In a region where youth account for nearly half of the population, we need to listen to what the younger generations envision for their region and accompany them in the process.

The 2020 KAS PolDiMed Survey will be a key element of our work for this year and will guide our activities for the remaining months of 2021. The survey follows our overall activities focused on local voices and local partners, and how we can facilitate political dialogue and support regional integration in the wider Mediterranean region. We would like to thank our partner, Arab Research and Analytics Associates (ARAA), for conducting this insightful regional survey and for providing analysis and perspective on the results of the quantitative data.

We hope you enjoy reading this first launch report of our survey and invite you to follow our subsequent thematic analyses of the KAS PolDiMed Survey, which will follow regularly during the first months of this year. We look forward to hearing your thoughts on the survey results and we remain open to any feedback or perspective on the findings.

Thomas Volk

Director
Regional Program Political Dialogue South Mediterranean
Konrad-Adenauer-Stiftung

KONRAD
ADENAUER
STIFTUNG

EXECUTIVE SUMMARY

A decade after the Arab uprisings of 2011, the region has experienced vast changes. Initial hope that the changes brought about by these events could lead to better governance and improved outcomes, especially economic ones, for citizens has largely given way to pessimism. Civil war rages across many countries while a new "Arab Cold War" has gripped the region. As the U.S. engagement in the Middle East and North Africa (MENA) has decreased, new actors have come to play a larger role, including China, Turkey, and Gulf countries, while Russia has reemerged as a regional power broker.

Despite a number of reforms following the 2011 uprisings, discontent remains high across the region with large-scale protests breaking out in 2019 in a number of countries across the region, including Algeria, Iraq, Lebanon, and Sudan, while smaller-scale demonstrations also became commonplace in Morocco and Jordan among others. Long-term weak economic growth has been exacerbated by the outbreak of COVID, placing significant stress on national economies and public services such as health and education.

Yet, despite many common challenges, there are also vast differences across the region. Over the past decade, Tunisia's democratic experiment has ensured citizens enjoy basic civil rights and have had the opportunity to peacefully change their governments through elections. Egypt's short-lived democratic experiment was reversed in 2013 while in other countries initial political reforms have given way to backsliding. In a number of countries, the outcome of the 2011 Arab Uprisings was civil unrest, including in Libya and Syria. These differing paths have led to vastly divergent conditions in countries across the region, which affect how citizens have perceived the last decade.

Amidst these challenges, the Konrad-Adenauer-Stiftung's Regional Program Political Dialogue South Mediterranean (KAS PolDiMed) 2020 survey, conducted by Arab Research and Analytics Associates (ARAA), reveals a changing and divided region. The results reveal that citizens remain frustrated with the failure of governments across the region to address critical challenges that led to the Arab uprisings of 2011. Economic conditions remain poor overall, with fewer than half of citizens rating economic conditions as good or very good. These ratings are particularly poor in Lebanon and Tunisia. In Lebanon, virtually no one says the economy is doing well following the collapse of the financial system, suggesting that further unrest may be forthcoming. In Tunisia, citizens are now about four

KONRAD ADENAUER STIFTUNG

times less likely to say the economy is doing well compared to those surveyed shortly after the 2011 uprising, which sets the stage for potential mass discontent and possible protests in the years ahead unless the government takes significant steps to improve conditions.

COVID has clearly exacerbated this situation, with only small percentages saying that economies are now stronger than they were a year before. Yet, there remains a clear message of hope for the years ahead as well as an opportunity for governments across the region. Despite these difficult conditions, Arab publics remain optimistic about life in the year to come. Majorities in most countries surveyed think the situation will get better, suggesting there remains hope and expectation that the situation will improve. The primary exception is Lebanon, however, where only 14 percent of citizens think the economic future will be better.

Although COVID has increased the economic challenges the region is facing, it has also brought an opportunity for governments in the region to rebuild trust with their citizens. The survey results suggest that in countries where the government is perceived as having done a better job addressing with the pandemic, citizens are more likely to trust their governments. In other words, when governments that have more effectively protected their citizens, at least in the eyes of the general public, citizens have rewarded this success with more positive views of the government overall. Given declining levels of trust in in national governments over the last decade, this could be the first step toward rebuilding trust in government across the region.

To address the challenges confronting the region, the survey demonstrates the importance of including actors other than the government in finding solutions. Although there is very little trust in parliament or political parties, there is far higher trust in voluntary groups such as civil society organizations (CSOs) and local religious institutions. Since relatively few citizens are likely to turn to formal political representatives, it is important that governments work with CSOs and other trusted institutions as they work to address political, economic, and health challenges facing their countries. At a minimum, governments should not impede the efforts of these organizations.

In the political sphere, support for democracy among Arab publics is moderate, with about half favoring a parliamentary system where all parties compete in the countries surveyed. At the same time, there is relatively strong support for any leader that is able to get things done, even if it requires bending the rules or sidestepping elected parliaments. There is also some willingness to simply abolish parliament in favor of a strong leader, with more than half agreeing with this statement in a majority of countries surveyed. Thus, the path to political reform is not entirely clear as citizens want both quick and decisive action, but still prefer to maintain a democratic system. These results underscore the importance of focusing not only on the political process, but also on ensuring that that representative government can achieve meaningful outcomes that benefit the lives of citizens.

Given these broad challenges, many citizens, particularly well-educated youth, have considered leaving their homeland. The major push factor is economic opportunities, although other concerns are important such as instability in Libya and corruption in Lebanon. Others simply want to leave for better educational opportunities. Notably, it is the better educated who have considered emigrating, meaning without reforms MENA countries risk losing some of its best and brightest, potentially exacerbating the brain drain that has long plagued the region.

At the international level, among global actors the clear winner is China. As a new actor in the region, China lacks the legacy of the U.S. or Russia and its recent engagement has focused primarily on economic issues. Arab publics seem open to this overture and view China favorably overall. Support for Russia is lower, but still significantly higher than the U.S. in most countries. Ten years after the Arab uprisings, the U.S. lags significantly behind these other powers.

However, Germany fares even better in the eyes of Arab publics. Germany is strongly favored in most countries, perhaps due to the fact it lacks a colonial history in the region and welcomed hundreds of thousands of refugees from the region in 2015-6. Views of France are more divided, however, perhaps given its longer history in the region and more recent controversies surround Macron's negative commentary on Islam. Meanwhile, Turkey is also largely favored across the region.

Despite the regional competition between Saudi Arabia and Qatar – which formally reconciled a few weeks after the survey was completed – many citizens have favorable views of both countries. However, Qatar is viewed more favorably in the majority of the countries surveyed, with the key exception of Libya. In effect, the Saudi- and UAE-led effort to isolate Qatar has paid few dividends in winning hearts and minds among ordinary citizens. Additionally, Saudi favorability is now lower than in Arab Barometer surveys conducted pre-2016, suggesting that Crown Prince Mohammed bin Salman's failed interventions in Yemen and

KONRAD ADENAUER STIFTUNG

the assassination of Jamal Khashoggi by Saudi agents have been costly in the eyes of the public. Ultimately, declining views of Saudi Arabia across the region likely contributed, at least in part, to the recent reconciliation between these GCC members.

Ten years after the uprisings, these results paint a picture of major challenges facing the region, but also significant opportunities. As the COVID crisis continues, domestic and international actors must take urgent action to work to address these challenges:

1) Work to tackle the COVID-related issues with a particular emphasis on the stress and concerns faced by women throughout the pandemic.

2) Build on early successes containing COVID to demonstrate governments are working to protect and improve the lives of their citizens.

3) Work to rebuild trust in parliament and political parties to allow them to serve their intended roles more effectively.

4) Partner with civil society organizations and other voluntary associations as alternative intermediaries with citizens given low trust in political parties and parliament.

5) Increase government responsiveness to the needs of citizens to limit support for strong leaders and increase democratic governance.

6) Work to address challenges leading to stagnant economic growth to prevent brain drain as youth seek better economic opportunities abroad.

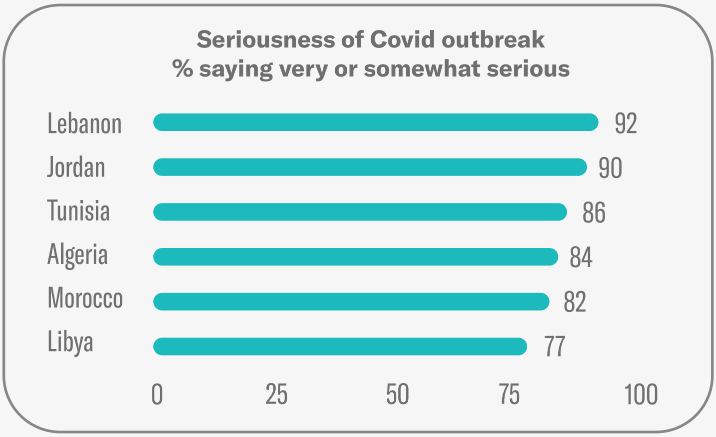
7) Develop a strong coalition of North American and European allies to support governments and civil society in the region.

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

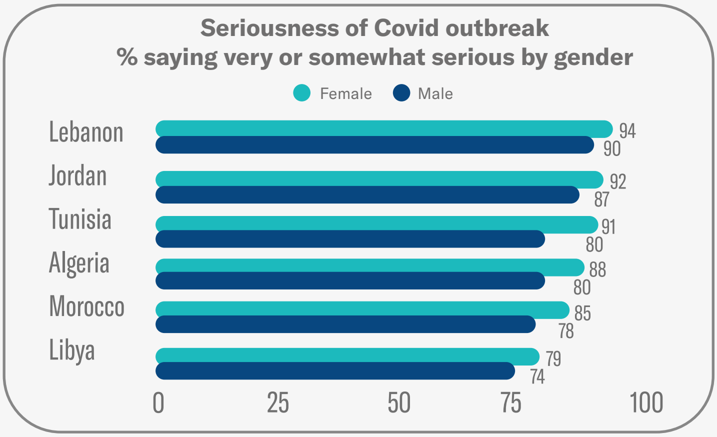
COVID

The COVID pandemic has significantly affected Arab publics, with case numbers rising dramatically in the second half of 2020. The KAS PolDiMed survey makes clear that Arab publics are deeply concerned about this challenge. The vast majority say the COVID outbreak in their country is very or somewhat serious, including 92 percent in Lebanon, 90 percent in Jordan, 86 percent in Tunisia, 84 percent in Algeria, 82 percent in Morocco, and 77 percent in Libya. These levels represent a significant increase in concern since late summer, when surveys from Arab Barometer found that fewer than three-quarters of citizens were concerned about COVID spreading in the six months ahead, including just 61 percent in Jordan and 59 percent in Tunisia.

Notably, concern about COVID is not evenly spread. Consistent with results from Arab Barometer surveys in summer 2020, the KAS PolDiMed survey finds a disproportionate concern among Arab women. Women are significantly more likely to be concerned about the COVID pandemic in Tunisia (+11 points), Algeria (+8 points), and Morocco (+7 points) and somewhat more concerned in Jordan and Libya (+5 points, respectively). Results from previous Arab Barometer surveys indicate this is due largely to women's greater concern about losing a family member or losing their family's primary source of income due to COVID. Addressing the COVID pandemic will, ultimately, require a specific focus on issues and concerns related to women.



KAS PolDiMed 2020 Survey

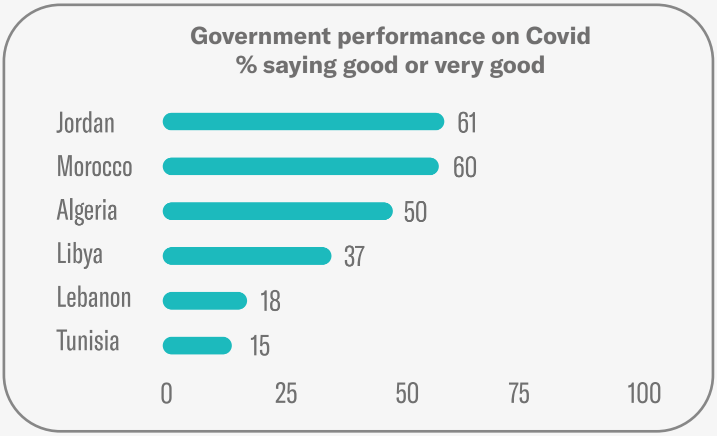


KAS PolDiMed 2020 Survey

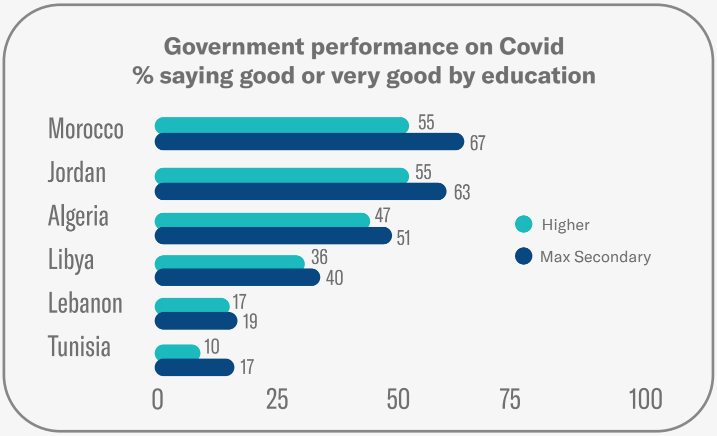
Levels of concern about COVID, including its health and economic implications, appear to be somewhat linked with perceptions about how the government is handling the crisis. The percentage of those who say the government is doing a good or very good job is just 18 percent in Lebanon and 15 percent in Tunisia. In contrast, ratings of government performance are far higher in Morocco (60 percent) and Algeria (50 percent), while Libya falls in between the other countries (37 percent). Notably, in the month before the survey, the number of cases per 100,000 was significantly lower in Morocco and Algeria than Tunisia and Lebanon, which may also explain the difference in responses on government performance on this issue.

The key exception to this trend is Jordan (61 percent). Jordan initially maintained a low number of COVID cases due to a strict lockdown in the earliest days of the crisis before witnessing a steep increase in cases in fall 2020. Most likely, Jordanians are reflecting on the initial steps taken by the government and attitudes may shift over the coming months.

Ratings of government performance on COVID differ, however, by level of education. In most countries surveyed, those with a university degree are less likely to say the government has done well than those with a secondary education or less. This difference is particularly pronounced in Morocco (-12 points), Jordan (-8 points), and Tunisia (-7 points), suggesting that opinion may differ by social status. Those with higher levels of education may be better informed about the pandemic and its effects and thus more critical of government efforts. As information is further disseminated, it is possible that those with lower levels of education will more closely resemble elite opinion.



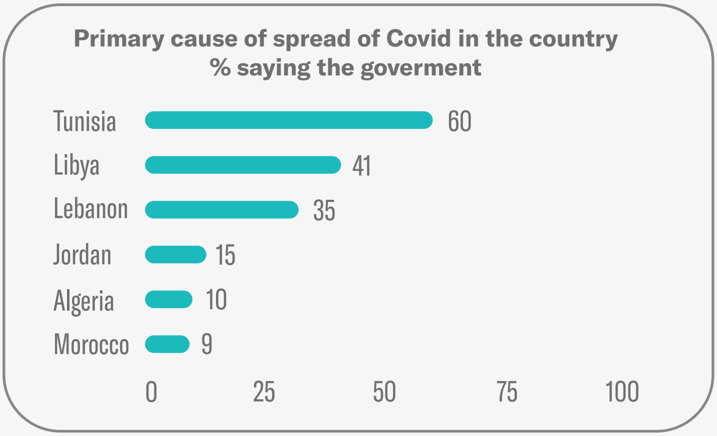
KAS PolDiMed 2020 Survey



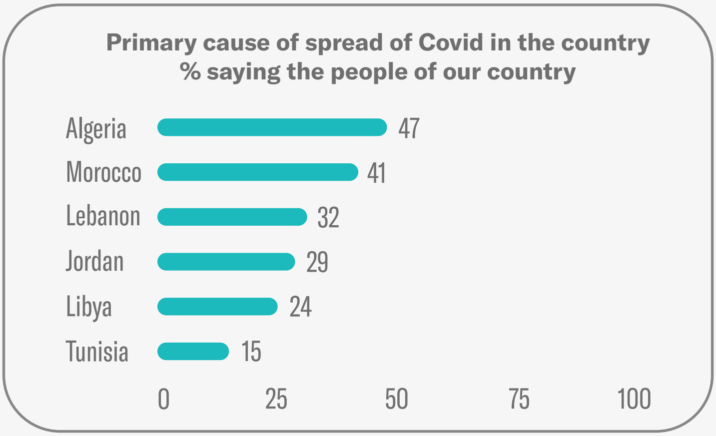
KAS PolDiMed 2020 Survey

Perceptions of government performance are also linked with how citizens apportion blame for the crisis. Although COVID came from abroad, very few Arab citizens blame external actors for the pandemic. Fewer than one percent say China is primarily to blame while at most one-in-ten blame Western countries. Instead, the vast majority blame the spread in their country on either the government or their country's citizens. In this case, there is a stark divide across the region.

In Tunisia, blame is squarely placed on government actions, with 60 percent saying the authorities are primarily responsible for the spread of the virus. Citizens appear to blame the government for lifting COVID-related restrictions in June and keeping the airport and borders open. In contrast, just 15 percent blame the country's citizens despite the fact that, according to an Arab Barometer survey from July 2020, Tunisians were by far the least likely public across MENA to wear facemasks or take additional precautions to prevent the spread of the virus.



KAS PolDiMed 2020 Survey



KAS PolDiMed 2020 Survey

In Lebanon, views are evenly divided. Although 35 percent blame the government, a similar percentage (32 percent) say that citizens are primarily to blame. It appears that the relatively limited actions taken by the government and the reluctance of some citizens to take warnings seriously have led to this division. In Libya, the citizens are also divided, although a higher percentage blame the government (41 percent) than the citizens of the country (24 percent). Despite Libya having rival governments, citizens are about equally likely to blame the government or the country's people for the spread of COVID in areas controlled by the GNA and the LNA.

Meanwhile, Moroccans and Algerians are far more likely to blame their fellow citizens than their governments. The plurality (47 percent) of Algerians thinks the actions of the people are to blame compared with 41 percent in Morocco. In both countries, just one-in-ten (10 percent in Algeria & 9 percent in Morocco) point to the government's actions as the main reason for the virus's spread. In Algeria, the government instituted a five-month lockdown across the majority of the country's wilayas (provinces), but as soon as it was lifted Algerians flocked to public places like the beach.

Morocco has had a strict lockdown since September, which has helped contain the number of cases throughout the fall when rates were increasing globally. It appears that these strong actions have been supported by their populations, leading to a broad sense that the government is not to blame for the virus's spread and the relatively higher ratings of government performance on COVID in these countries.

In Jordan, relatively few citizens blame the government (15 percent) or the country's people (29 percent). Instead, the plurality (39 percent) say it is simply the will of God.

As COVID continues to affect the Arab region, it is clear that citizens will be judging their governments based on their performance. If governments are unable to bring the situation under control, at least relative to the expectations of citizens, it will serve to increase frustration and potentially lead to a continuation of the unrest seen in 2019 and early 2020 before the outbreak of the virus. The long-term effects of COVID will not only be felt in the lives that are lost, but also in lost economic productivity and weak employment markets which could be the basis for future political instability.

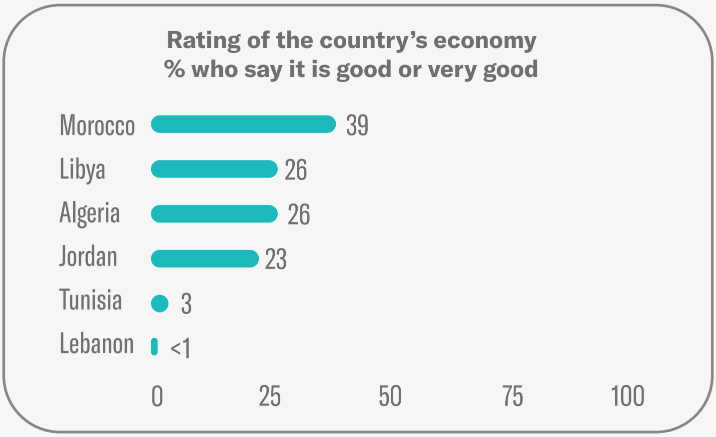
KONRAD ADENAUER STIFTUNG

ECONOMIC CONDITIONS

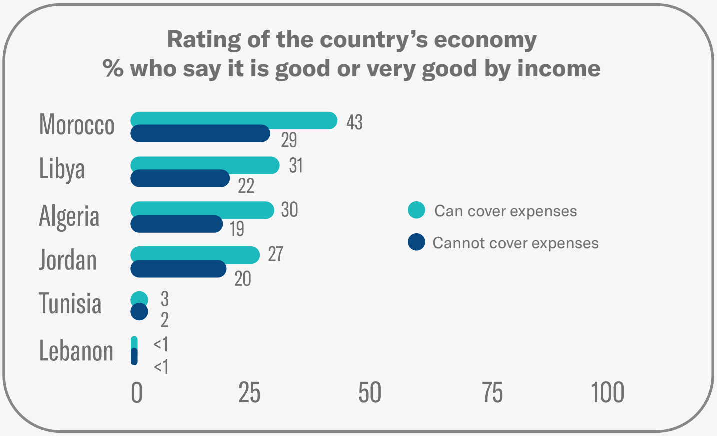
Economic conditions have been a major challenge and one of the driving factors behind the Arab uprisings of 2011. At the time, minorities of citizens across the region rated conditions as good or very good, with roughly a third (34 percent) holding this view across ten countries surveyed by Arab Barometer. Yet, a decade later, the percentage who hold this view is even lower on average. Although 39 percent rate economic performance as good or very good in Morocco, only about a quarter say the same in Libya (26 percent), Algeria (26 percent) and Jordan (23 percent). Meanwhile, economic ratings are abysmal in both Tunisia (3 percent) and Lebanon (<1 percent).

In Tunisia, this level is 24 points lower than in 2011, while in Lebanon ratings are relatively similar, as just six percent said the economy was prospering in 2010. Elsewhere, overall levels generally remain low, implying a lost decade across the region in terms of addressing economic challenges.

Unsurprisingly, personal economic conditions affect views of the overall country's position. Citizens who are well off enough to meet their basic expenses are far more likely to rate economic conditions positively, including by 14 points in Morocco, 11 points in Algeria, 9 points in Libya, and 7 points in Jordan. However, there are not consistent differences by age, level of education, or gender in respect to the views of economic conditions.

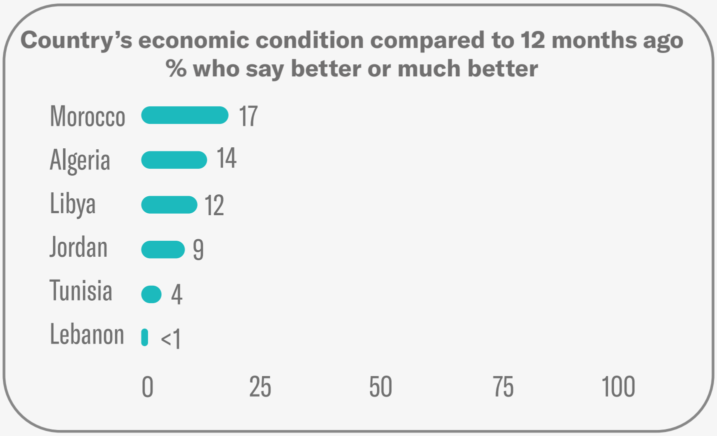


KAS PolDiMed 2020 Survey



KAS PolDiMed 2020 Survey

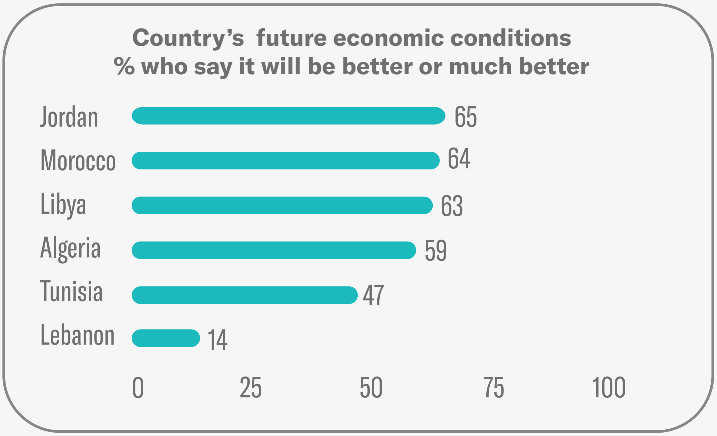
Not only are economic conditions poor, but Arab publics perceive that the situation has deteriorated over the past year. Fewer than one-in-five say that economic conditions are better than 12 months ago in all countries, with just 17 percent in Morocco, 14 percent in Algeria, 12 percent in Libya, nine percent in Jordan, four percent in Tunisia, and less than a percent in Lebanon holding this view. Given the effects of COVID on economies across the region and beyond, it is unsurprising that very few perceive economic conditions as worse than before. However, this finding highlights the massive challenge facing governments in the region as countries now must cope with additional economic dislocations due to COVID.



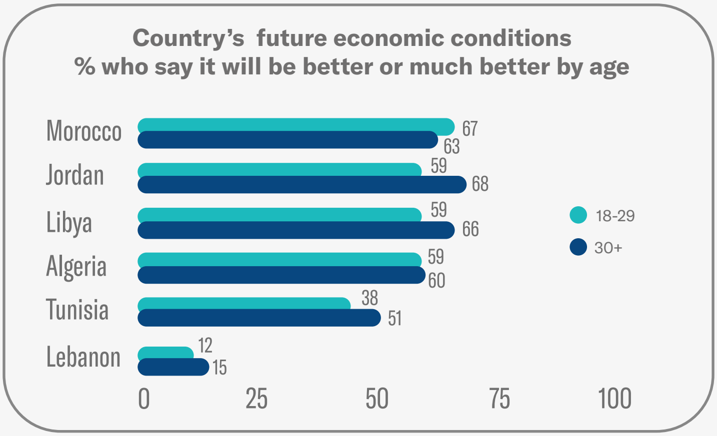
KAS PolDiMed 2020 Survey

KAS PolDiMed Survey 2020

Despite current economic hardships, Arab publics are relatively optimistic about the future. Majorities say that the country's economic future will be better in 12 months' time in Jordan (65 percent), Morocco (64 percent), Libya (63 percent), and Algeria 59 percent. Tunisians are somewhat less hopeful, but still nearly half (47 percent) say they expect economic conditions to improve. Among the publics surveyed, only Lebanese do not expect significant improvements with only 14 percent being optimistic. These findings accord with previous Arab Barometer surveys that have consistently found that despite ongoing challenges Arab publics are largely hopeful about their futures.



KAS PolDiMed 2020 Survey



KAS PolDiMed 2020 Survey

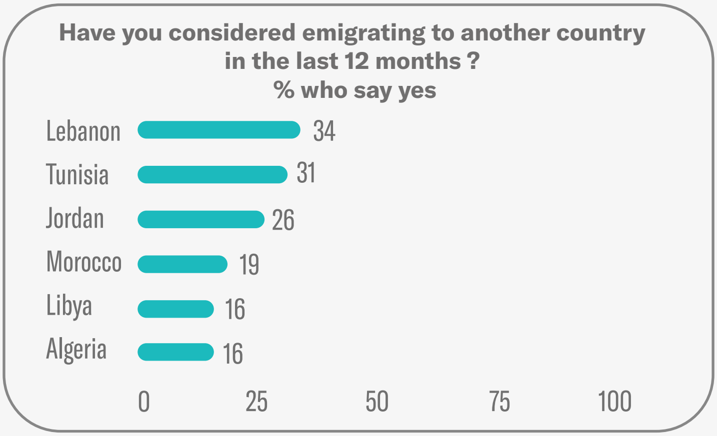
KONRAD ADENAUER STIFTUNG

Additionally, the survey makes clear that hope for the future is generally shared across most demographic groups in each country. Men and women, more and less educated, and wealthier and poorer are all about as likely to say their country's economic fortunes will improve. The only consistent difference is by age, with youth being less hopeful about conditions improving in Tunisia (-13 points), Jordan (-9 points), and Libya (-7 points).

MIGRATION

Despite relatively hopeful attitudes about the country's future, many still hope to move abroad someday in the future. When asked if they have considered migrating in the past 12 months, at least a quarter in Lebanon (34 percent), Tunisia (31 percent), and Jordan (26 percent) want to leave their homeland. However, only in Lebanon has there been an increase in the percentage since 2018 based on results from Arab Barometer surveys. Today, a third of Lebanese (34 percent) say they have considered emigrating compared to 26 percent in 2018. In Tunisia, the percentage is largely unchanged since 2018. The dire economic conditions combined with the relatively lower levels of economic optimism in both countries compared with the rest of the region appears to have led to this difference.

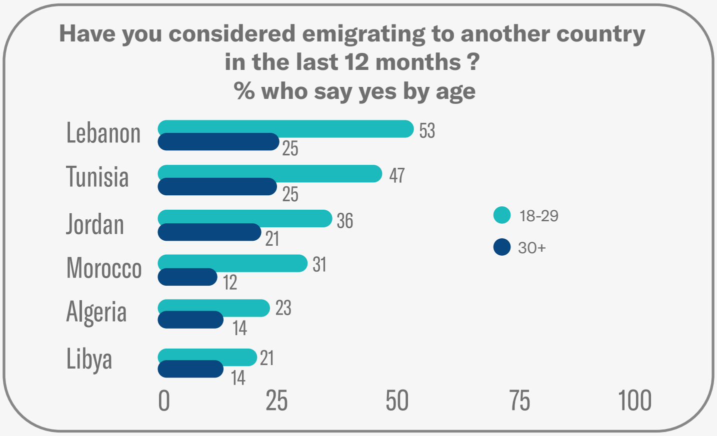
In the remaining countries, small but significant shares of the population have considered emigrating, ranging between 19 percent in Morocco and 16 percent in Algeria and Libya. In all three countries, the desire to emigrate is now lower than in the 2018-9 Arab Barometer survey. Mostly, this decline is likely due to COVID-related restrictions having depressed the percentage of respondents who are considering emigrating, which could again rise when global restrictions on the movement of people ease.



KAS PolDiMed 2020 Survey

KAS PolDiMed Survey 2020

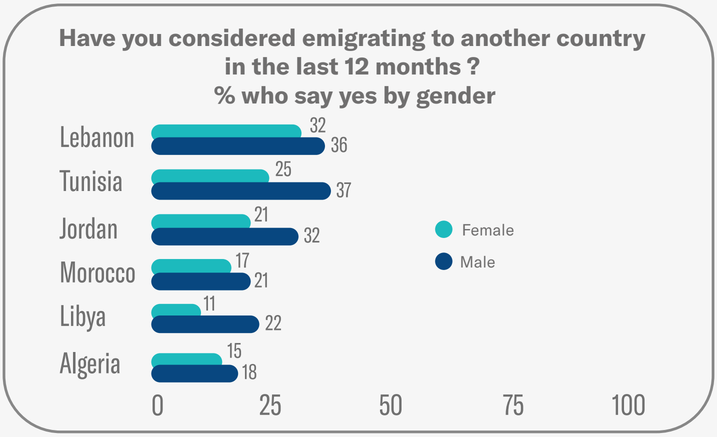
KONRAD ADENAUER STIFTUNG



KAS PolDiMed 2020 Survey

The desire to emigrate is far higher for youth ages 18-29 than those who are 30 or older. In Lebanon, youth are more than twice as likely to have thought about emigrating (53 percent vs. 25 percent) while they are nearly twice as likely to have done so in Tunisia (47 percent vs. 25 percent). Meanwhile, in Morocco they are 19 points more likely to have considering emigrating compared with nine points in Algeria and seven points in Libya.

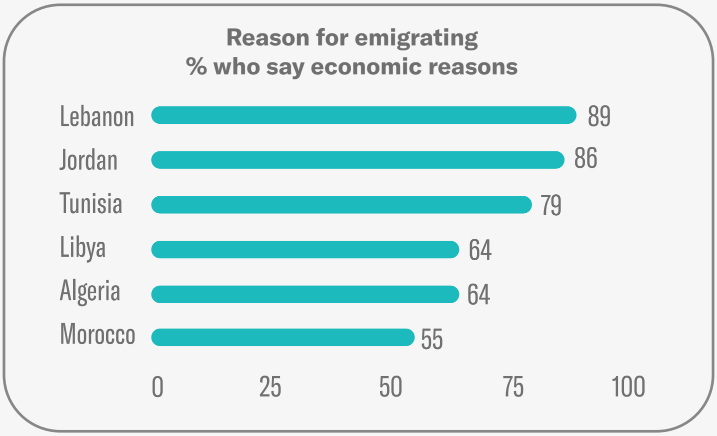
Men are also far more likely to want to emigrate than women. Differences are especially pronounced in Tunisia (+12 points), Jordan, and Libya (+11 points, respectively). This accords with prior Arab Barometer surveys, which consistently find a difference by gender related to the desire to emigrate.



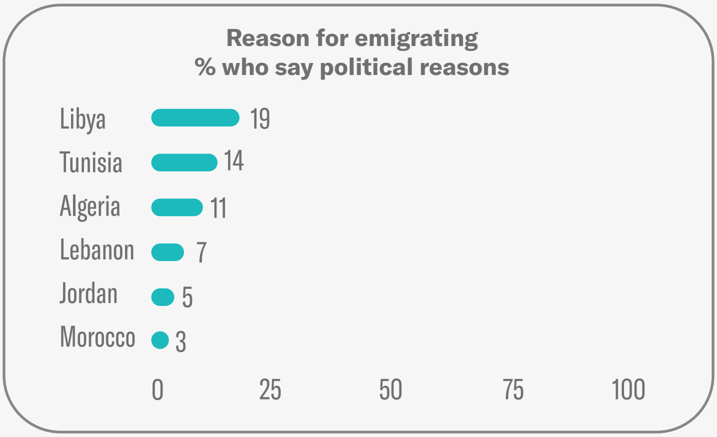
KAS PolDiMed 2020 Survey

KONRAD ADENAUER STIFTUNG

Among those who have considered migrating, there are many potential reasons for leaving. However, a majority in all countries cite economic considerations as one motivation behind their decision. This reason is most common in Lebanon (89 percent), Jordan (86 percent), and Tunisia (79 percent). Perceptions of economic conditions are lowest in these three countries among those surveyed, underscoring the strong relationship between economic outcomes and the desire to migrate. Elsewhere, around six-in-ten say economic reasons, including 64 percent in Libya, 64 percent in Algeria, and 55 percent in Morocco. Creating economic opportunities for youth is a clear need in the coming decade given these trends. By comparison, fewer than one-in-five in all countries cite political reasons.

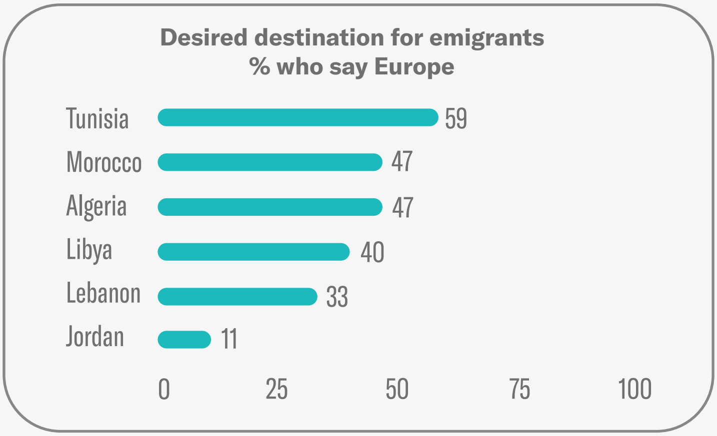


KAS PolDiMed 2020 Survey

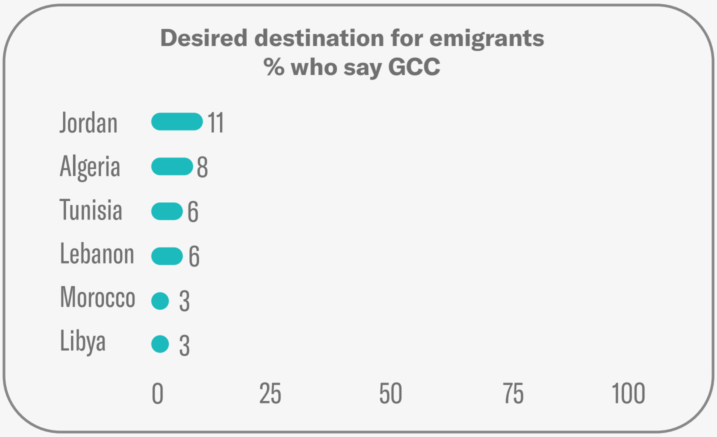


KAS PolDiMed 2020 Survey

The predominate destination for potential migrants is the West, especially Europe. When asked to list countries where they are considering migrating, the most common response in all Maghreb countries was Europe, including 59 percent in Tunisia, 47 percent in Morocco and Algeria, and 40 percent in Libya. In Levant countries, North America is cited as frequently in Lebanon while Jordanians are nearly twice as likely to prefer North America compared with Europe (20 percent vs. 11 percent). By comparison, destinations in other parts of the world were far less commonly listed. The GCC, a historic importer of workers from other Arab countries, is far less popular, with no more than 11 percent in Jordan seeking to move to the Arab Gulf.



KAS PolDiMed 2020 Survey



KAS PolDiMed 2020 Survey

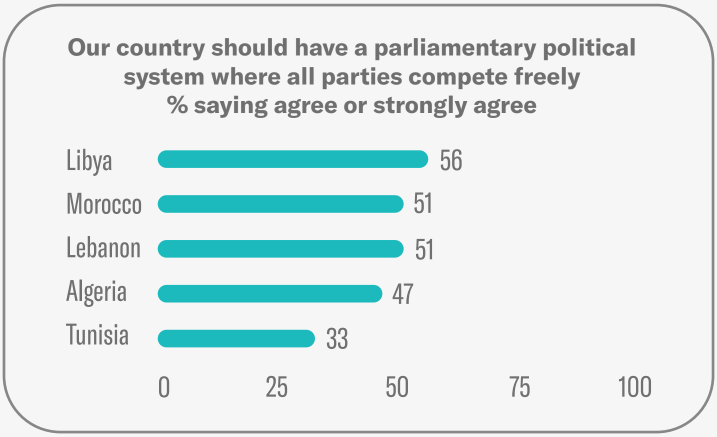
These results largely correspond with historic migration patterns, suggesting that potential migrants may seek to leave for economic opportunity but are more likely to seek to move to countries with a significant diaspora population where they may have relatives or friends to help with the transition. As COVID-related restrictions on freedom of movement ease in the coming years, there will likely be a widespread desire among many Arab citizens, particularly the young and educated, to try to move for better economic opportunities.

SYSTEM OF GOVERNMENT

The protesters of the Arab uprisings of 2011 not only demanded economic reforms, but also called for changes to political systems. Long-standing authoritarian rulers had long dominated the region with no country qualifying as democratic based on rankings by Freedom House. Citizens demanded governments that were more responsive to their needs with a greater respect for their citizenry. Among the countries surveyed, Tunisia and Libya witnessed a change in government, while Algeria, Jordan, and Morocco responded with significant reforms and economic support for citizens in the years following the 2011 protest movement. Yet, these reforms did not meet the demands of citizens. In 2019, less than a decade later, mass protests forced changes in leadership in Algeria and Lebanon while smaller-scale demonstrations became common in Jordan and Morocco demanding reforms. Although Tunisia's political transition has brought major accomplishments such as ensuring basic rights, successive governments have struggled to meet the economic demands of citizens. Within this regional environment, the optimal political system remains contested.

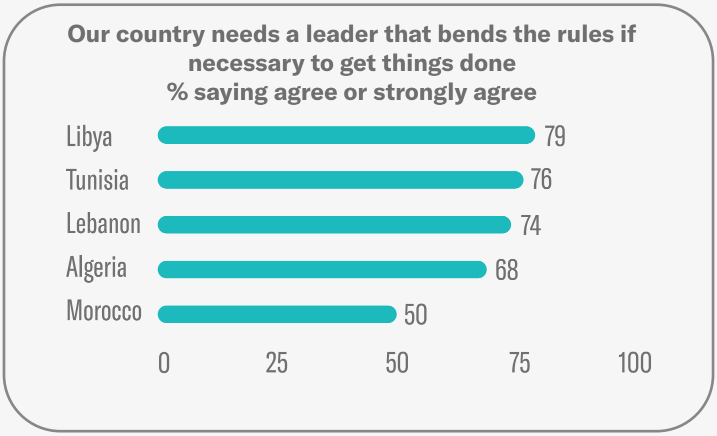
The KAS PolDiMed survey makes clear that citizens prefer democracy, but most would trade it for a system that is effective at achieving meaningful results. When asked whether they agree or disagree that their country should have a system of governance governed by parliament where all parties compete in elections, support is mixed. In most countries, around half favor this form of liberal democratic system, ranging from a high of 56 percent in Libya to 47 percent in Algeria. Of the countries where this question was asked, support is by far the lowest in Tunisia (33 percent) even though Tunisia is widely considered the most democratic. In part, this low level is likely due to frustration over this political system to deliver particularly economic outcomes to improve the lives of citizens since the revolution, making it clear that Tunisians don't only demand input legitimacy but also output legitimacy in exchange for their support.

KONRAD ADENAUER STIFTUNG

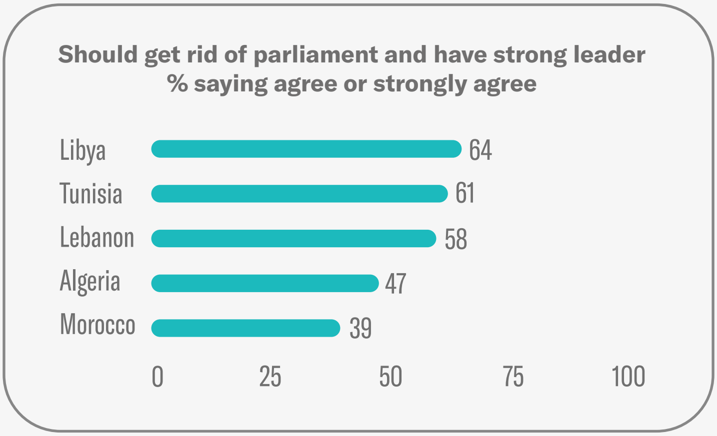


KAS PolDiMed 2020 Survey

The desire for an effective leader is widely shared across MENA countries. When asked if their country needs a leader who can bend the rules if necessary to get things done, majorities agree in all five countries where the question was asked. More than two-thirds agree in Libya (79 percent), Tunisia (76 percent), Lebanon (74 percent), and Algeria (68 percent). Support is lowest in Morocco, but half still agree. These results suggest that most citizens are far less concerned about procedures and full adherence to legal rules or institutional norms as long as it means a leader can deliver results.



KAS PolDiMed 2020 Survey



KAS PolDiMed 2020 Survey

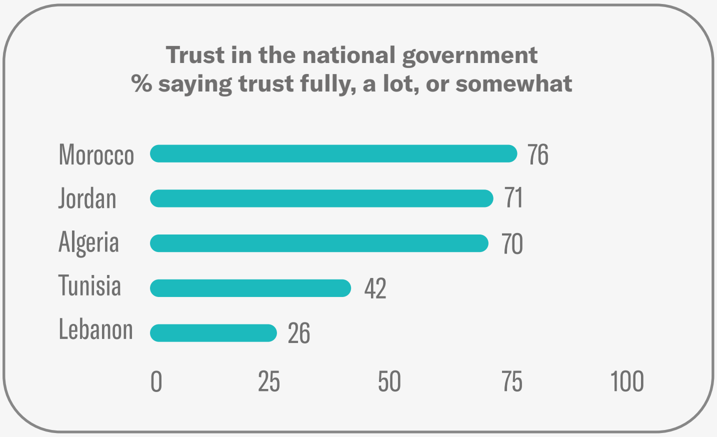
Moreover, citizens' frustrations appear to undermine the usefulness of parliaments. When asked if parliament should be abolished in favor of a strong leader, majorities in Libya (64 percent), Tunisia (61 percent) and Lebanon (58 percent) agree, as do nearly half in Algeria (47 percent). Only in Morocco is a minority (39 percent) in favor of such a political system. This result makes clear not only that citizens want a leader who can make necessary changes, but also that it reinforces the low esteem in overall governance, while economic grievances remain high. Relatively few see representative parliaments as part of the solution; instead, a focus on the country's leader and his or her ability to make necessary reforms appears to be the primary demand of the majority of Arab publics.

Notably, both men and women, better and less well educated, and citizens of all ages are about equally likely to hold these views. In other words, limited support for a liberal democratic system and support for a strong and effective leader is found across all key demographic groups. Ultimately, this suggests that leaders who claim to break the hold of existing political elites are likely to have significant success, perhaps even more so if they say they are willing to take whatever steps are necessary on behalf of the people. Poor economic outcomes combined with political systems that have not been able to successfully address them appear to have created conditions that are favorable to populist leaders taking hold.

KONRAD ADENAUER STIFTUNG

TRUST IN INSTITUTIONS

The Arab uprisings offered a potential reset in relations between governments and those they govern. Political reforms across many countries offered hope that governments might prove to be more responsive and willing to address the ongoing concerns of citizens. As a result, Arab Barometer results find that levels of trust in government increased in the first two years after the uprisings for the region as a whole, but subsequently dropped dramatically across the region. COVID offers a new opportunity for citizens to reassess the relationship with their government. Governments that are able to tackle the problem effectively, or at least positively based on relative expectations, may see an increase in support while those that do not may see further declines.



KAS PolDiMed 2020 Survey

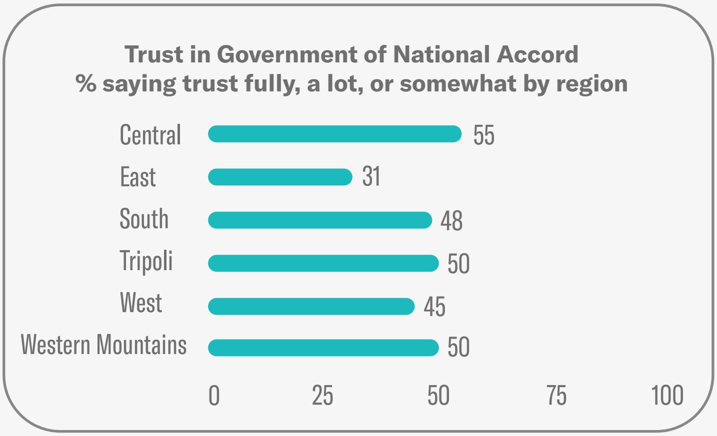
Results from the KAS PolDiMed survey reveal that trust in the national governments varies widely across countries. In Morocco, three-quarters (76 percent) say they trust their government fully, a lot, or somewhat. The results are similar in Jordan (71 percent) and Algeria (70 percent), with seven-in-ten saying the same. Notably, in Algeria, the most common response is "somewhat trust" (31 percent), meaning that a third of citizens appear willing to give the new government a chance, but they remain somewhat cautious about giving it their full confidence at this time.

Although Algeria shares different political systems and recent histories from long-term stable monarchies in Jordan and Morocco, citizens in all three countries largely trust their national governments. In large part, this may be due to the manner in which the governments have been managing the COVID

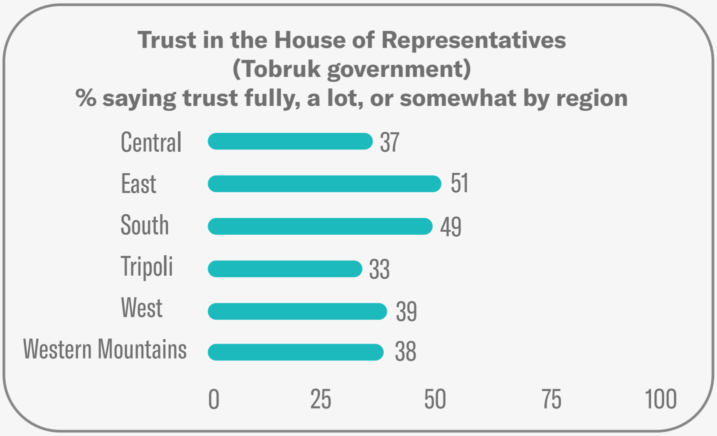
KONRAD ADENAUER STIFTUNG

pandemic. Despite some missteps, particularly in Algeria when the president got COVID, the general perception appears to be that the governments overall have done well in managing the crisis, at least at the time the surveys were conducted. Majorities in all three countries rate the government's handling of this crisis positively while minorities in all three blame the government for the spread of the virus in their country. Despite other challenges facing these countries, including significant economic issues, it appears that citizens in both are more likely to trust the government based, at least in part, on their handling of this health crisis.

Meanwhile, fewer than half trust the national government in Tunisia (42 percent) or Lebanon (26 percent). In Tunisia, this level of trust in government is significantly higher than in the 2018 Arab Barometer survey, which was conducted prior to the 2019 elections that ushered in the new government. It appears that the change to a political outsider as president, seen by many as tackling a corrupt political system, has improved attitudes toward the government overall. In Lebanon, confidence in the government has always been low in Arab Barometer surveys but is even lower today. Given the dire situation in the country with the collapse of the financial system, soaring inflation, the Beirut port explosion, and rising numbers of COVID cases, it comes as little surprise that Lebanese would have very low trust in their government.



KAS PolDiMed 2020 Survey



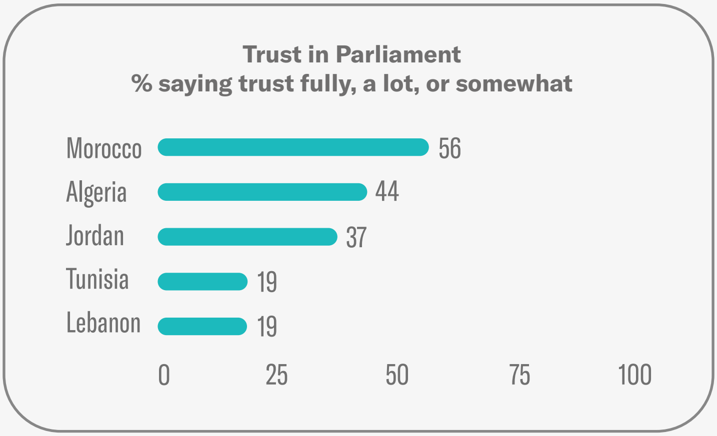
KAS PolDiMed 2020 Survey

Despite the ceasefire in Libya, two rival governments remain in place claiming legitimacy as negotiations continue toward a final settlement. However, the survey results make clear that trust is not significantly higher in one rival government than the other. Trust in the Government of National Accord (GNA) is 45 percent compared with 42 percent for the House of Representatives (Tobruk government). As might be expected, trust in the GNA is higher outside of the country's east, including 55 percent support in the central governorates, 50 percent in Tripoli and the western mountains, and 48 percent in the south. By comparison, in the east, which is the stronghold of the Libyan National Army (LNA), just 31 percent trust the GNA.

In contrast, trust in the LNA-supported Tobruk government is highest in the east (51 percent) and south (49 percent), but just 37 percent in the central part of the country and 33 percent in Tripoli. Ultimately, these results imply that a permanent political settlement requires inclusion of figures from each of the rival governments to achieve legitimacy across the entire country. This finding is especially important in the run up to planned elections in December 2021 to establish a national government for the country, indicating the need to ensure inclusion of supporters of both parties to provide legitimacy for the process.

Levels of trust in parliament are significantly lower than the national government in all countries surveyed. Levels of trust are highest in Morocco, where a slight majority (56 percent) say they trust this institution fully, a lot, or somewhat. Morocco's parliament includes parties with stronger historic ties to society than in many other countries in MENA and includes parties that are seen as oppositional. Like these factors, combined with the government's overall strong performance on COVID, has resulted in relatively higher levels of trust in parliament.

Meanwhile, in Jordan, 37 percent trust parliament following the November 10, 2020 parliamentary elections, which is also higher than in past Arab Barometer surveys suggesting that many Jordanians may hope for improved performance from their newly elected officials.

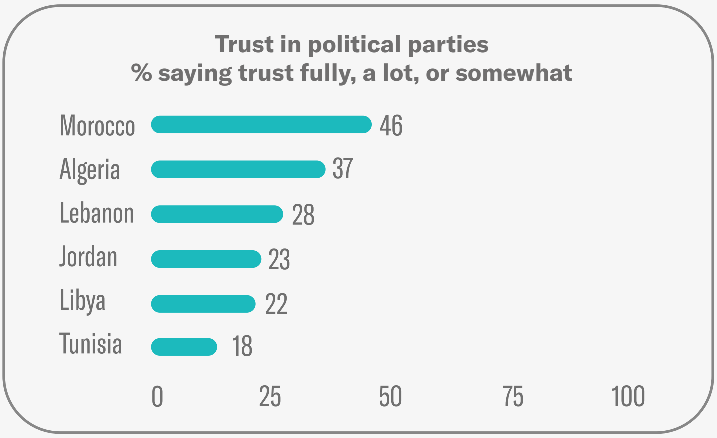


KAS PolDiMed 2020 Survey

In Lebanon and Tunisia, levels of trust in parliament are far lower, with only 19 percent having confidence in their legislature in both countries. For Tunisia, the most democratic country in the region, this low level raises significant concern for the country's future. Despite the fact that the country's parliament was freely elected, the institution inspires very little trust among the public. The same holds true for Lebanon, which has more meaningful elections than most other countries in MENA. It seems clear that citizens in both countries have higher expectations than are not being met by these institutions at present.

In Libya, trust in the General National Congress (GNC) is also low, with only a third trusting it fully, a lot, or somewhat. In effect, given the civil war and division of the country, the GNC has not been functioning in a meaningful manner similar to other legislatures, and has not met officially in recent years. Thus, trust in the institution is more likely the result of its historical failures or hopes that it could again serve its intended function as a national parliament, which is supported by the fact that levels of trust are roughly equal across all regions of the country. Given the relatively low level of trust in this institution combined with the similar levels of trust in Libya's two rival governments, finding a political solution for Libya will remain challenging.

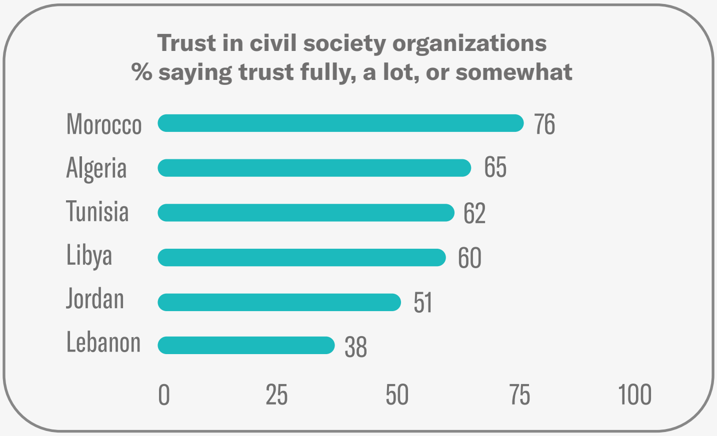
As governments look to build trust with their citizens, a key challenge is a lack of trust in political parties, which serve as a key element to channel interest and demands in democratic political systems. Parties can serve as an instrument for reform that could bring greater responsiveness to the ongoing demands of citizens. Yet, in all countries, a minority of citizens trust political parties fully, a lot, or somewhat. This continues a long-standing trend across MENA found in Arab Barometer data showing that political parties lack widespread legitimacy. Given the importance of political parties in channeling groups interests within political systems, it is critical to increase trust in these institutions to help ensure stability and to increase the responsiveness of governments to the needs of citizens.



KAS PolDiMed 2020 Survey

Levels of trust in political parties are highest in Morocco (46 percent) and Algeria (37 percent). In Morocco, a relatively stable party system where party identification is relatively higher, including for the Justice and Development (PJD) party and other long-standing parties may account for this result. In Algeria, political parties have typically not enjoyed significant trust in Arab Barometer surveys. However, the political system undergone reforms in response to the hirak. Although these reforms do not go as far as leaders of the hirak have demanded, it appears that they have increased trust to a degree across the political system, including in political parties.

In other countries surveyed, fewer than a third have confidence in political parties with just 28 percent in Lebanon, 23 percent in Jordan, 22 percent in Libya, and 18 percent in Tunisia trusting these institutions. Lebanon's political system is strongly defined by political parties attached to a sectarian identity, but Arab Barometer results from September 2020 make it clear that citizens are deeply frustrated with this system and prefer a civil (non-sectarian) state. In Libya, parties were banned under the Qaddafi regime and new parties have failed to gain traction. For Tunisia, it appears that political parties are another causality of the ongoing transition that has been underway since 2011. At the time of the revolution, citizens had high hopes that a democratic political system could address the economic shortcomings and high levels of corruption associated with the Ben Ali regime. The result has been one of political stagnation that has failed to bring the dramatic changes citizens had wanted. Compromise across political parties has proved difficult, with ineffectual governments dating back to the troika and beyond. As political parties have struggled to gain hold in the new system or prove their utility in channeling demands, parties remain distrusted and citizens have started to look to leaders from outside the political system like President Kais Saied.

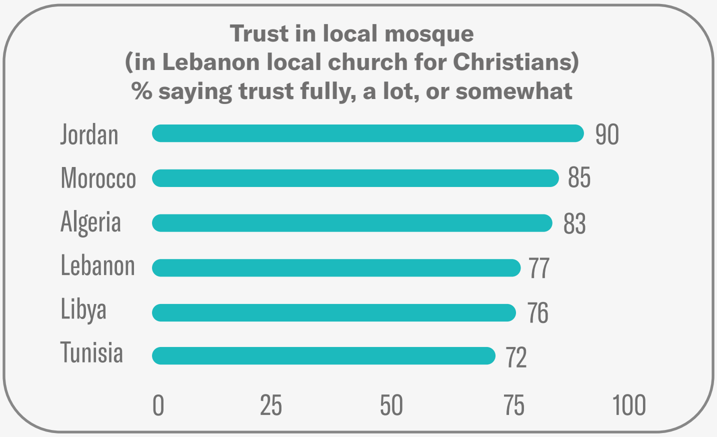


KAS PolDiMed 2020 Survey

Yet, while low levels of trust imply political parties are unlikely to be major agents of reform, the survey suggests that there may be a larger role for voluntary organizations. Majorities trust civil society organizations (CSOs) fully, a lot, or somewhat in all countries except Lebanon. In Morocco, fully three-quarters (76 percent) trust CSOs as do roughly two-thirds in Algeria (65 percent), 62 percent in Tunisia, and 60 percent in Libya. Only in Lebanon does a minority (38 percent) hold this view, although this level is substantially higher than trust in the national government or political parties.

KONRAD ADENAUER STIFTUNG

This relatively high level of trust is likely related to the perceptions about civil society. Results from Arab Barometer fifth wave demonstrate that all but one of 12 countries surveyed, citizens were significantly more likely to say that CSOs were doing all they could to provide citizens with basic services compared with the government. Given the relatively poor economic outcomes over recent decades, it appears that the perception that CSOs are working to help citizens has inspired substantial confidence in such organizations in most countries.



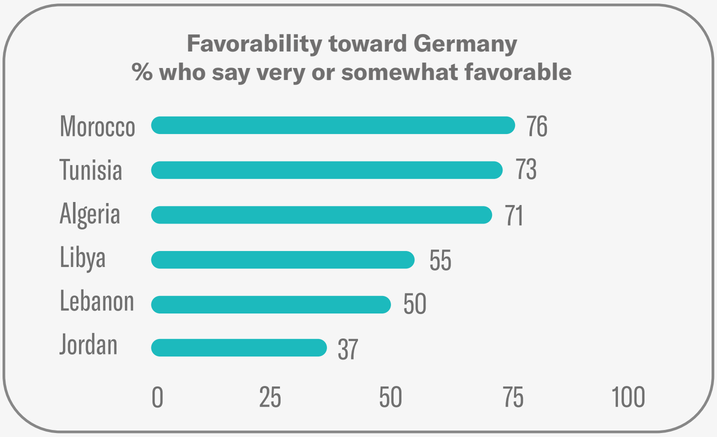
KAS PolDiMed 2020 Survey

Moreover, other local voluntary organizations also enjoy high levels of trust with local religious institutions being even more trusted than CSOs, including 90 percent in Jordan. In all countries surveyed, at least seven-in-ten trust their local mosque or church fully, a lot, or somewhat. In Morocco, where religion is held up as part of the national motto (God, Homeland, King), 85 percent say they trust their local mosque as do 83 percent in Algeria. In Lebanon, where sectarian identity structures much of social and political life, local churches and mosques are widely trusted (77 percent) while the same is true in Libya (76 percent). Even in Tunisia, which has the highest percentage of citizens who describe themselves as 'not religious' across MENA countries, the vast majority still maintain confidence in religious institutions.

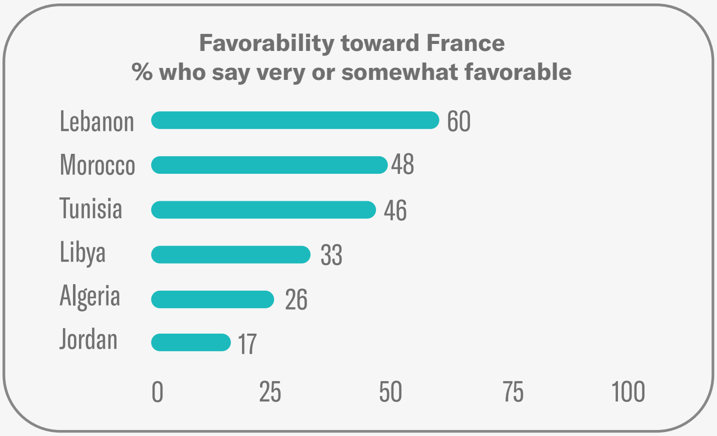
Notably, levels of trust in these institutions are held across nearly all main demographic groups. These results suggest that there are key institutions who are largely trusted in MENA and could be key interlocutors between the demands of citizens and their governments. Civil society organizations and other voluntary organizations such as religious institutions have the ability to work for the needs of citizens to help ensure governments are aware of the needs of citizens and work to find policy solutions to societal challenges. Especially on ongoing issues related to COVID and associated problems, governments would be advised to work collaboratively with such organizations and institutions in promoting meaningful solutions.

INTERNATIONAL RELATIONS

Since the Arab uprisings of 2011, many new actors have come to play an increasing role across MENA. As U.S. power has declined in the region, Russia has reemerged as a significant regional actor while China expanded its reach through the Belt and Road Initiative (BRI) by signing cooperation agreements with many Arab governments. European governments remain engaged, with a particular emphasis on the region following the refugee crisis of 2015-6. At the same time, the regional Saudi-UAE bloc has sought to counter influence from a range of countries including Turkey, Qatar, and Iran while pushing back against Islamists across MENA. Against this backdrop, the KAS PolDiMed survey seeks to understand how ordinary Arab citizens view international actors and understand their role in the region.



KAS PolDiMed 2020 Survey

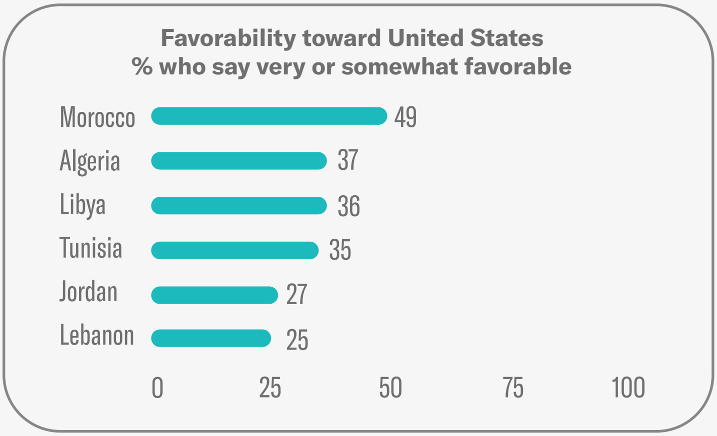


KAS PolDiMed 2020 Survey

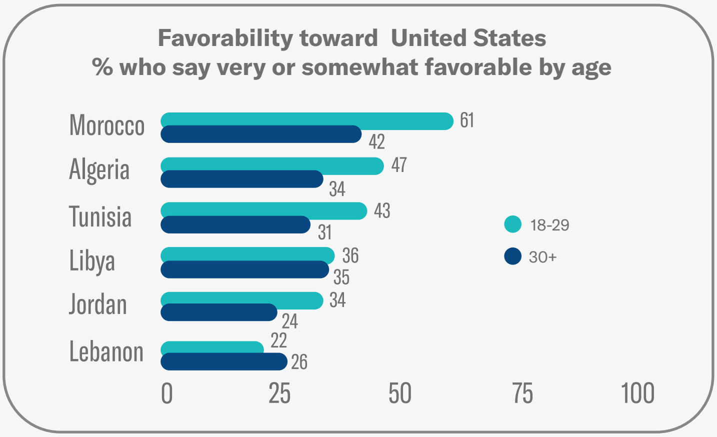
Among European powers, Germany is viewed most favorably across the countries surveyed. More than seven-in-ten have a positive view of Germany in Maghreb countries, including 76 percent in Morocco, 73 percent in Tunisia, and 71 percent in Algeria, while 55 in Libya and half in Lebanon do also. Only in Jordan does a minority view Germany favorably. By comparison, support for France is significantly lower, with a majority having a positive opinion only in Lebanon (60 percent), perhaps due to French President Emmanuel Macron's efforts to secure a solution to the country's political impasse in fall 2020 and the strong historic relations between the two countries. Views of these two European powers differ little by age in the countries surveyed.

Among global powers, views of the U.S. are relatively unfavorable. In no country does a majority say they have a very or somewhat favorable view of the U.S. American favorability is highest in Morocco (49 percent), which is a longtime U.S. ally, but should be significantly lower elsewhere. Given the U.S.'s recent decision to recognize Morocco's territorial claims over Western Sahara, this level is likely to have increased since the survey was conducted. Meanwhile, across the rest of North Africa, support is lower with 37 percent of Algerians, 36 percent of Libyans, and 35 percent of Tunisians viewing the U.S. positively. Favorability is even lower in the Levant where only 27 percent of Jordanians and 25 percent of Lebanese view the U.S. positively. In Lebanon, views vary strongly by sect with Christians having far more favorable view of the U.S. than other main groups.

KONRAD ADENAUER STIFTUNG



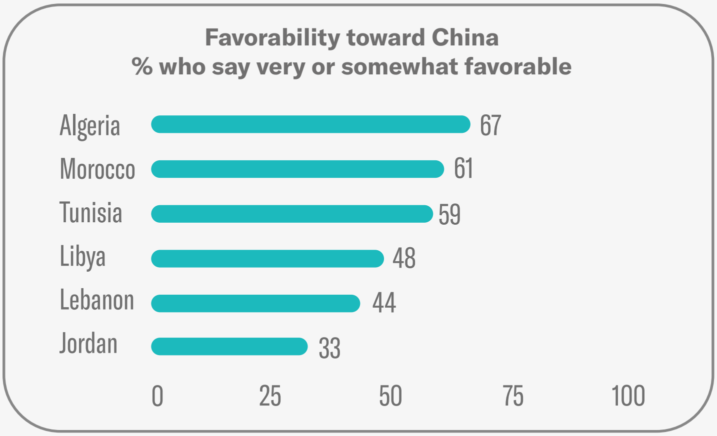
KAS PolDiMed 2020 Survey



KAS PolDiMed 2020 Survey

However, attitudes toward the U.S. may improve over time as, in most countries surveyed, youth ages 18-29 have significantly more positive views of the U.S. than those who are older, including by 19 points in Morocco, 13 points in Algeria, and 12 points in Tunisia. In part, this may be due to the fact that youth tend to be better educated than older generations. Across most countries, those with higher levels of education tend to be more pro-U.S. than those who are less well educated.

KONRAD ADENAUER STIFTUNG

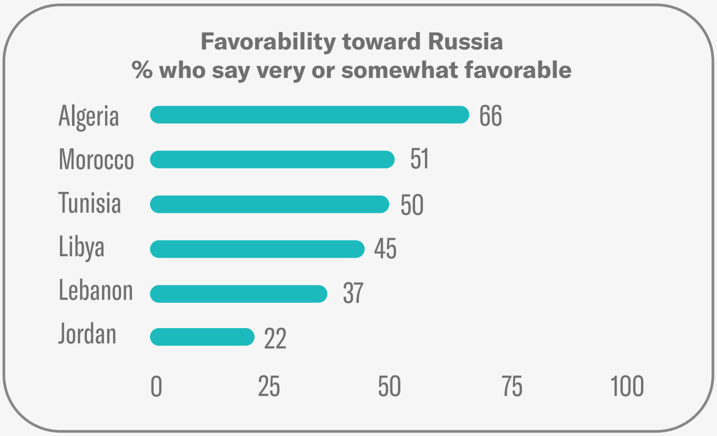


KAS PolDiMed 2020 Survey

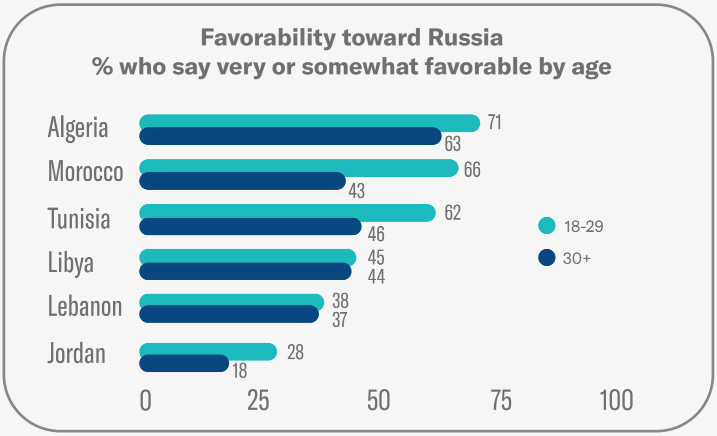
China, which has recently increased its ties to MENA dramatically, is viewed far more positively than the U.S. Majorities in Algeria (67 percent), Morocco (61 percent), and Tunisia (59 percent) have positive views, while nearly half hold positive views in Libya (48 percent) and Lebanon (44 percent). Only in Jordan does a clear minority of citizens have a positive view of China. Notably, unlike the U.S., there are no clear demographic patterns of support amongst Arab publics. In this case, younger and older citizens across the region are about as likely to favor China.

As the new power in MENA, citizens in the region have less familiarity than in long-standing powers like the U.S. Moreover, Chinese policy has been to take a more hands-off approach on controversial political issues. Likely, this lack of knowledge and hope that initiatives like BRI might improve economic conditions are linked with the more positive views of China in the region. This result is consistent with the high levels of favorability for Germany, another non-colonial power, and correspondingly lower favorability for France in most countries, which was one of the two main colonial powers in MENA.

Views toward Russia fall between those of the U.S. and China, which appears linked with its greater involvement in the region and the Soviet legacy across the region. Algerians have, by far, the most favorable view of Russia with 66 percent holding positive views. Meanwhile, half have positive views of Russia in Morocco (51 percent) and Tunisia (50 percent). In Libya, 45 percent do, which is linked with Russia's intervention in the country, especially given that support for Russia is highest in the country's east (52 percent) but far lower in Tripoli (39 percent) and the central region (38 percent).



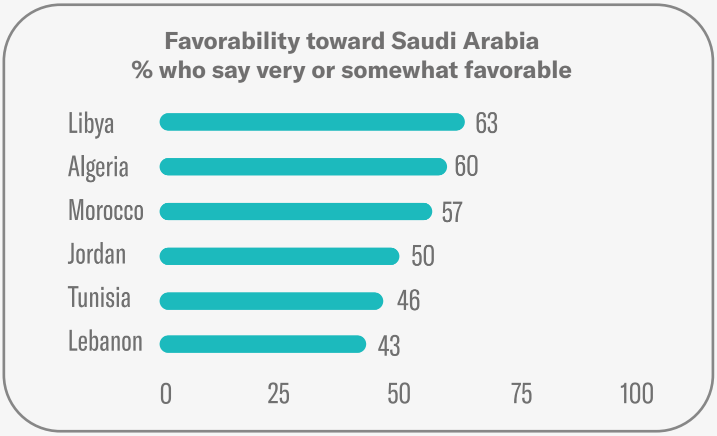
KAS PolDiMed 2020 Survey



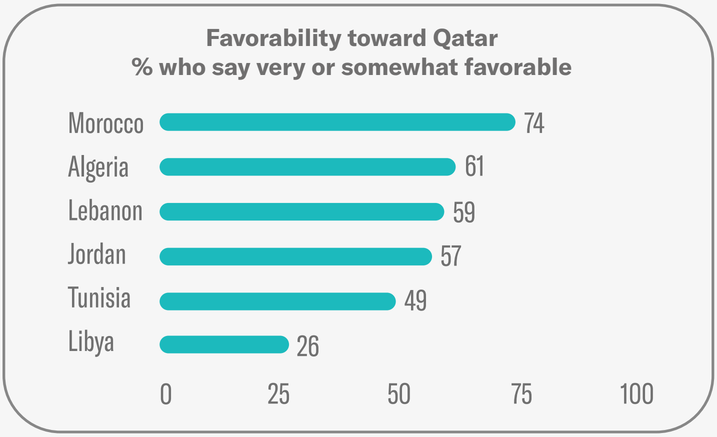
KAS PolDiMed 2020 Survey

In Lebanon, views are significantly less favorable at just 37 percent, which may be a product of Russia's intervention into neighboring Syria. Although 61 percent of Shias in Lebanon have a favorable view of Russia, just 14 percent of Sunnis do. Similar to the U.S., across the region youth ages 18-29 are more likely to have positive views of Russia, including by 23 points in Morocco, 16 points in Tunisia, and 10 points in Jordan.

KONRAD ADENAUER STIFTUNG



KAS PolDiMed 2020 Survey

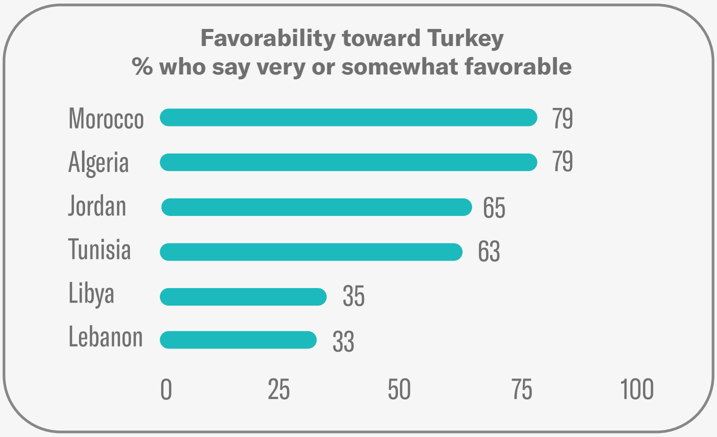


KAS PolDiMed 2020 Survey

Regional powers continue to compete for influence across MENA, with the Saudi and Qatari blocs competing for influence despite the recent rapprochement between the countries. Although both countries are generally viewed more positively than the U.S. or Russia, Qatar tends to have the advantage in the battle for hearts and minds. In five of the six countries surveyed, Qatar is viewed more or equally favorably to Saudi Arabia, including by 17 points in Morocco, 16 points in Lebanon, and 7 points in Jordan. Only in Libya is Saudi Arabia viewed more positively, in this case by 37 points. Given Saudi support for the LNA, it is unsurprising that support is higher in

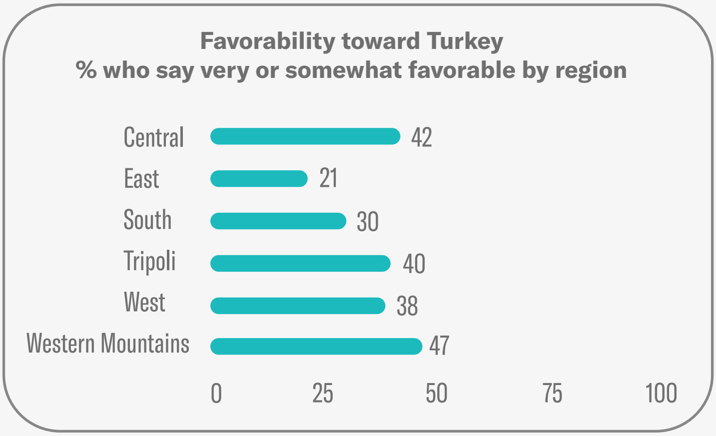
Libya's east (74 percent) than in other areas of the country including Tripoli (54 percent) or the central governorates (52 percent). However, Saudi Arabia still enjoys relatively strong favorability across the country.

Turkey is another significant regional power, having increased its presence and influence across MENA over the last decade. In most countries, Turkey is widely supported, with clear majorities holding favorable views in Morocco (79 percent), Algeria (79 percent), Jordan (65 percent), and Tunisia (63 percent). This support likely results from Turkey's strong support for the Palestinian cause and efforts to counter Syrian President Bashar al-Assad in Syria.

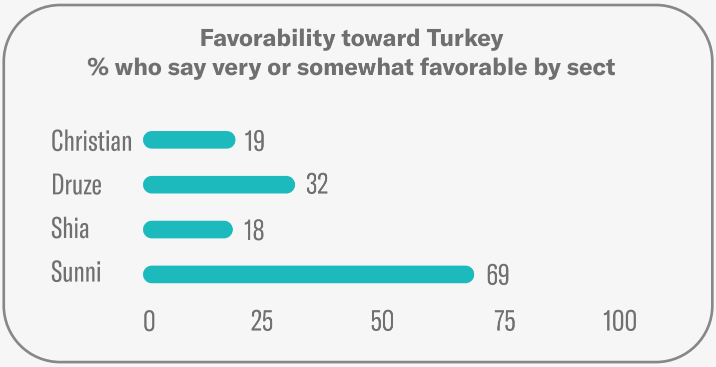


KAS PolDiMed 2020 Survey

However, this view is not universal. In Libya (35 percent) and Lebanon (33 percent), Turkey is viewed far less positively. In Libya, this is largely the result of Turkey's intervention in support of the GNA. Libyans living in Tripoli are nearly twice as likely to favor Turkey compared to those in the country's LNA-dominated east (40 percent vs. 21 percent). In Lebanon, views of Turkey vary strongly by sect, with 69 percent of Sunnis having a positive view compared with just 19 percent of Christians and 18 percent of Shias. These attitudes correspond with the nature of Turkey's intervention in Syria viewed as supporting the Sunni-led opposition.



KAS PolDiMed 2020 Survey



KAS PolDiMed 2020 Survey

Beyond questions on perceptions of countries around the world, the KAS PolDiMed survey included questions about the foreign policies of leaders of individual countries. When asked about which European leader has the best foreign policy between German Chancellor Angela Merkel, French President Emmanuel Macron, and British Prime Minister Boris Johnson, the clear winner is Merkel. She is favored by nearly half in Algeria (46 percent), Tunisia (45 percent), Morocco (44 percent), and Libya (42 percent), while Macron is clearly preferred only in Lebanon (35 percent) and all three have low ratings in Jordan.

KONRAD ADENAUER STIFTUNG

Views of global leaders are more mixed. U.S. President Donald Trump is the least favorable with fewer than 15 percent favoring his policies in all countries surveyed. His low support may be due, in part, to extremely low ratings of the Abraham Accords. Except in Lebanon (24 percent), at most about one-in-ten ordinary citizens favor these accords. Support is higher for Chinese President Xi Jinping, ranging from 27 percent in Tunisia to nine percent in Jordan and Lebanon. Russian President Vladimir Putin is more preferred across the region, with a third or more favoring his policies in Libya (37 percent), Algeria (35 percent), and Tunisia (33 percent).

Among regional leaders from Turkey, Iran, Saudi Arabia, Egypt, and the UAE, the there is a strong preference for the policies of Turkish President Recep Tayyip Erdoğan. His is favored by 56 percent in Morocco, 54 percent in Algeria, 47 percent in Tunisia, and 46 percent in Jordan. Only in Libya is there another clear preference, in this case Egyptian President Abdel-Fattah el-Sisi with 53 percent followed by Erdoğan at 23 percent. In Lebanon, support is roughly equally divided between the leaders of Iran (15 percent), Saudi Arabia (15 percent), and Turkey (11 percent), with significant by sectarian identity.

KONRAD ADENAUER STIFTUNG

CONCLUSION

The KAS PolDiMed survey makes clear that the decade after the 2011 Arab Uprisings has been challenging. Economic ratings remain poor across most of the region and COVID has made this situation far more challenging over the past year. Yet, there are also clear signs of hope that emerge from the survey. In all countries except Lebanon, majorities say that they expect the economy to improve over the next 12 months, indicating that there remains a clear hope for a better future. Citizens have not resigned to conditions that will never get better.

Importantly, governments across the region also have a significant opportunity that has emerged from COVID. Those that are perceived to have managed the crisis better tend to be more trusted. After a decade of declining levels of trust across the region, this is an important development that could be a first step toward a renewal of hope for the region. If national governments can build on this success by bringing tangible solutions to the needs of citizens after the pandemic ends, it will lead to better outcomes for citizens and make the mass protests seen across the region in 2019 less likely to recur.

This outcome is not guaranteed, however. Trust remains relatively low in parliaments and political parties, which are actors that citizens could use to channel their needs and concerns to the government at large. Particularly, effort will be needed by representatives and party leaders to work on behalf of citizens to try to improve these views.

There is also a significant opportunity to work with other actors in society. Voluntary groups like civil society organizations and local religious institutions are among the most trusted in society. Strengthening these groups could be a vehicle to ensure that the voices of citizens are heard so that governments can more effectively address their needs. Governments would be advised to help empower voluntary organizations across society and turn to them as partners who can help tackle vexing problems ranging from improving health systems during the COVID era to finding economic solutions.

For the international community, there is also a clear opportunity for collaboration. Citizens have very favorable views of a number of foreign countries, particularly Germany. The policies of Germany Chancellor Angela Merkel have been widely favored and Germany's role as a non-colonial power in MENA. This combination positions Germany to be a leader in working with governments and citizens across the region to find solutions to difficult challenges. It is important for Germany to take a leading role, especially given that both China and Russia are viewed relatively favorably as well in most countries. As both continue their expansion into the region, it is important for Germany to continue supporting efforts at democratic reform and good governance to help improve the lives of ordinary citizens.

KONRAD ADENAUER STIFTUNG

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

About KAS PolDiMed:
The Regional Program Political Dialogue South Mediterranean of the Konrad-Adenauer-Stiftung (KAS PolDiMed) implements transnational projects from Tunis with reference to the entire area of the southern (Maghreb) and eastern Mediterranean (Mashrek). It is designed to strengthen political dialogue, social and economic integration in the region and to promote long-term partnership with the European Union. The Konrad-Adenauer-Stiftung is a non-governmental German political foundation with over 100 offices worldwide and 12 programs in the MENA region. Nationally and internationally, we work for peace, freedom and justice through political education. The consolidation of democracy and development cooperation are our particular concerns. For more information, visit www.kas.de/poldimed or contact info.poldimed@kas.de.

Konrad-Adenauer-Stiftung e. V.

Thomas Volk
Director
Regional Program Political Dialogue South Mediterranean
www.kas.de/poldimed

Konrad-Adenauer-Stiftung e. V.
Regional Program Political Dialogue South Mediterranean
Le Prestige Business Center, No. F.0.1
Rue du lac Windermere, Les Berges du Lac
1053 Tunis, Tunisia
Telefon: +216 70 029 460
E-Mail: info.poldimed@kas.de