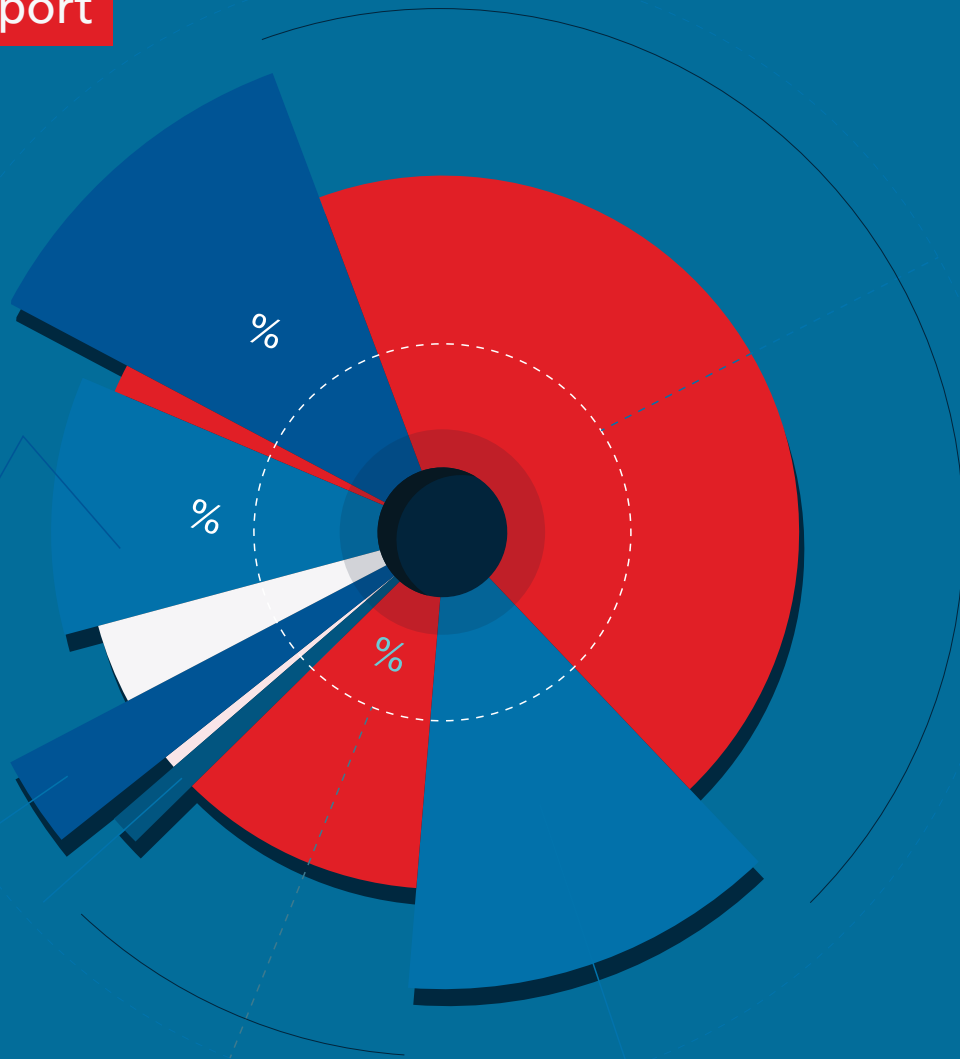


July, 2023

Multipolarity and the Middle East: Exploring Regional Attitudes towards the Russia-Ukraine War

Full Report



ZEITEN **WENDE**

FOR A JUST FUTURE!

A project of the Friedrich Ebert Foundation 2022-2023

The Friedrich-Ebert-Stiftung's focus project Zeitenwende deals with the radical process of change that Germany and Europe are currently undergoing. Russia's war of aggression against Ukraine represents both an epochal break and a test of endurance. New answers adapted to the changed realities must be found. This necessitates a reorientation of Germany's foreign policy. The project seeks to make its contribution by mapping, accompanying and contributing to debates, opinions and controversies on Germany's role in a changing world. We offer a space for discussion and provide information for a deeper understanding of the issues.

Based on our fundamental beliefs and values, we ask how peace, freedom and prosperity can be ensured in the future? What adjustments are needed in Germany's and Europe's policies? And what form might a broad social consensus take on the future international role of the Federal Republic of Germany? We offer a platform to experts and remain open for new perspectives at any time. We want to promote the exchange of opinions and strengthen social participation. In short, it is about filling the new era with life. We look forward to having you with us!

www.fes.de/zeitenwende

About the Friedrich-Ebert-Stiftung

The Friedrich-Ebert-Stiftung (FES) was founded in 1925 and is Germany's most traditional political foundation. It is still committed to the legacy of its namesake today and is committed to the fundamental values of social democracy: Freedom, Justice and Solidarity. Ideally, it is linked to social democracy and the free trade unions.

The FES promotes social democracy primarily through:

- Political education work to strengthen civil society
- political consulting
- International cooperation with foreign offices in over 100 countries
- promotion of gifted students
- the collective memory of social democracy with an archive and library.

Table of Contents

Multipolarity and the Middle East: Exploring Regional Attitudes towards the Russia-Ukraine War.....	1
Foreword	2
Introduction.....	3
Methodology.....	3
Sex, Age, Location	4
Limitations	4
Historical and economic contextualization.....	4
Russia's historic engagement with the MENA	4
Conceptualizing socio-economic impacts on livelihoods	6
Results and Discussion	9
I. Perceptions of the War: Contextualizing Political Positionalities across the MENA	9
Cold War Revival?	9
Who is responsible for the war?	9
Who is responsible for continuing the war?	10
Neutrality - war impacts - Russia/US-trust in the region	11
Who benefits if the war continues?	11
Part of a larger conflict?	13
Russia or Ukraine? - MENA Countries' Positionalities.....	14
II. Perceptions on the Socio-Economic Effects of the War.....	17
Western Sanctions since 2014	17
Perception of sanctions in the MENA region	17
Views on sanctions were divided.....	18
Felt impacts on livelihoods at the home country level, resource scarcity and access	20
Impacts on livelihoods in the countries surveyed	23

III. Perceptions of Global Shifts and their Meaning for the Region	24
Nuclear and other perceived threats to security	24
Political systems as a factor influencing public opinion	26
Russia and the US in the MENA: who is perceived as the lesser evil?	26
Russia's Military Presence in the Middle East – Parallels and Repercussions of Escalations	30
Who is most likely to “do the right thing”?	31
Polarity Unpacked: What MENA Countries are expecting the global order to Become	31
Global polarity: to superpower or not to superpower?	32
Peace and Security in the region - Expectations for the coming years.	33
Zooming into National Contexts in the MENA: Where to Place Them in this Global Power Shift	33
Iran: is anti-Americanism still in fashion?	34
Israel: The known outsider	35
Gulf Countries: what's oil got to do with it?	36
Türkiye: tangoing between NATO and the Duma.	39
Jordan: a stable monarchy to steady US interests in the region?	39
Iraq: 20 years after the invasion, war wounds are still fresh	40
Lebanon: preoccupied by its own abyss?	40
Egypt: divorcing a former Soviet ally as the hand that feeds it withdraws?	41
Maghreb: somewhere between food security and hard security.	42
Gender and Age Analysis of Results	43
Summary	43
Policy and Future Research Recommendations	44
Acknowledgements.	46
Glossary	47
Annex	48
Geopolitical Survey – YouGov Questionnaire	48
Geopolitical Survey – Questionnaire covering Iran, Qatar, UAE.	52

Multipolarity and the Middle East: Exploring Regional Attitudes towards the Russia-Ukraine War

Full Report

Russia escalated its war against Ukraine with a large-scale invasion in February 2022¹. This has caused tens of thousands of deaths on both sides, as well as Europe's largest refugee crisis since World War II. The consequences continue to be felt around the world, including in the Middle East and North Africa (MENA) region.

How does this war impact daily lives, politics and economics in MENA societies? How do they see it, who do they hold responsible, who do they think benefits, and does it represent for them a change in the status quo of their region?

The **Friedrich Ebert Foundation's Regional Peace and Security Project** commissioned a survey covering twelve MENA countries² to:

- Understand **people's perceptions of the Russia-Ukraine War**
- Identify the **impact of the Russia-Ukraine War on the MENA region**
- Understand **people's opinions on the involvement of Russia and the US** in the affairs of the MENA region
- Understand **people's perceptions of global power distribution**

The survey investigated whether the foreign policy stances of MENA governments were reflected in the attitudes of their

populations and whether the gap between Western and MENA government response to the war was reflected in MENA public perception: does the public of the MENA region see the Russia-Ukraine War differently? And if so, why might that be?

Data was collected by two data collection institutes across twelve MENA countries. Support to conceptualize and analyze the data was provided by Lebanon-based Dr. Jasmin Lilian Diab, Director of the Institute for Migration Studies and Assistant Professor at the Lebanese American University, and Wissam Saade, Lecturer of Political Science at Saint Joseph University and regular op-ed writer in leading Lebanese and Arab newspapers.

¹ The war in Ukraine began in 2014 with the annexation of Crimea by Russia and the subsequent conflict between Ukrainian government forces and pro-Russian, Russia-backed separatists in eastern Ukraine. This escalation followed the political unrest and protests in Ukraine known as the Euromaidan movement, which led to the ousting of the pro-Russian Ukrainian President Viktor Yanukovich. The conflict in Ukraine since 2014 has involved pro-Russian separatist movements in Donetsk and Luhansk, leading to armed confrontations with Ukrainian government forces.

² The survey was conducted in: Egypt, Iran, Iraq, Israel, Jordan, Lebanon, Morocco, Qatar, Saudi Arabia, United Arab Emirates, Tunisia and Türkiye. For more information on country selection, see methodology.

FOREWORD

Dear Reader,

When Friedrich-Ebert-Stiftung commissioned this survey in the fourth quarter of 2022 it had already become apparent that Western reactions to the Russia-Ukraine War differed a great deal from how Middle Eastern governments were responding to the newly unfolding geopolitical picture.

The Western reaction was swift: condemn, sanction, isolate. Moscow was to be completely economically ostracized from what certain commentators termed “the civilized world.” In the Middle East, governments’ reactions were much more nuanced. While many countries rhetorically disapproved of Russia’s breach of international law, they nonetheless made sure not to burn bridges, remaining on speaking, and often even cordial, terms with Moscow.

This was all the more remarkable because both ideologically distant governments and Western allies across the MENA region refused to toe the Western line of outright condemnation. Türkiye, Saudi Arabia, the United Arab Emirates (UAE), even Israel, were clearly unwilling to line up for what the dominant Western debate characterized, in morally charged black and white terms, as the defense of the so-called rules-based international order.

The British journalist Gideon Rachman so aptly described it as a Western “axis of outrage” that contrasted globally with an “axis of indifference.” With this description he captured an important truth: that the conflict looks different – not only from where you geographically stand but also from what your historical experiences have been.

An all-out war of aggression, on European soil, between the continent’s geographically biggest and second biggest countries may have seemed outlandish until very recently, from a European perspective. On Middle Eastern soil war is, unfortunately, a much less rare phenomenon. Middle Eastern governments of all sorts have a regional history of foreign intervention, disregard for territorial integrity, support for subversive action and regime change or separatism in neighboring countries. So Russia’s course of action looks much less shocking from a Middle Eastern perspective. Especially in the aftermath of the so-called Arab Spring that was characterized by a warfare-prone struggle for regional ideological hegemony.

However, regional context is not the only variable that explains different positions towards the Russia-Ukraine War. Western powers’ past behavior, not least the United States, oftentimes in accord with European allies, has recurrently overstepped international law in the Middle East. Leading nowadays to frequent accusations of hypocrisy. From a Middle Eastern perspective, Russia’s actions towards Ukraine could be seen as closer to just another global power acting like the US, or another regional power acting like their own neighbors.

The rules based international order that the West wants to

uphold in Ukraine is perceived very differently in the Middle East. Perhaps less out of sympathy for a Russia with little soft-power appeal—whose actions in Ukraine conjure up images of the savagery inflicted on Aleppo and other Syrian cities—more out of resentment for a Western order whose grandiloquent rhetoric with regard to international law, human rights and democracy, oftentimes fails to match its rather mundane actions.

What we are witnessing is the emancipation of a bunch of regional players who make it quite clear, be it to Washington, Moscow, Beijing or Brussels, that they are much more than pawns on a geopolitical power play chessboard. Meticulously, sometimes ruthlessly, navigating the uncharted waters of a new multipolar global reality, the Middle East – or at least its governments and leaders – want to be winners in this new international order.

This survey aimed to explore whether these ambitious foreign policy stances from MENA governments were reflected in the beliefs, attitudes and opinions of their populations. The gap in reactions to the war between Western and Middle Eastern governments, supposed indifference to Ukraine’s plight, the subordination of the war under geopolitical motives: were these things the peoples of the Middle East could also relate to?

In foreign policy, popular opinion often matters less. It’s a political field that is traditionally shielded from parliaments, being the exclusive domain of the executive. The authoritarian nature of many governments in the MENA region may make popular opinion even less likely to impact policy. But in the long run, any government’s legitimacy is undermined by pursuing foreign policy at odds with their population’s choice.

While the nature of MENA governments is often authoritarian, this is not to say that they don’t care about popular legitimacy. The question of how the peoples of the Middle East and North Africa perceive this war, which has become a watershed moment for international affairs, is thus of more than a purely academic interest. It will, in the long run, have political consequences. All the more important it therefore is to shed light on what the region thinks about the conflict, about the world order and about its own place within.

I wish you an inspiring read.

Marcus Schneider

Director, Project Peace and Security in the MENA region

INTRODUCTION

The ongoing conflict between Russia and Ukraine has had direct global impacts, including in the Middle East, which is geopolitically close to the conflict zone. Prior to this escalation of the war in Ukraine in 2022, Russia had already been involved militarily in Syria, supporting the Syrian regime.

The effects of the Russia-Ukraine War so far have been severe for many in the Middle East and North Africa, affecting living conditions in the region. General concerns circle around socio-economic effects, but also deeper security questions as well as understanding of the global order as it is. Are we witnessing the change of the global system, and if yes, what does it mean for the MENA region?

This survey was commissioned by Friedrich Ebert Foundation's (FES) Regional Peace and Security Project to understand MENA citizen's attitudes towards the Russia-Ukraine War, as well as their perception of its effects on the region and their individual situations. It seeks to understand whether MENA populations back their governments' official positions as well as to identify cross-border trends.

In view of both the long historical bonds and the far-reaching consequences of the current war, this study seeks to explore how people in the region perceive this conflict, how they are affected and what they expect its further course to be.

Perceptions of Russia in the Middle East are mixed and have undergone significant changes since 2000, following Russian President Vladimir Putin's rise to power. Russian policy in the region has benefited from the prevalence of critical discourse towards the unipolar world order, especially after American intervention in Iraq in 2003.³

Between 2005 and 2015 Russian-Turkish relations became strained. Russia's war with Georgia in 2008 added additional tension. Further, Russia adopted a persistent approach against what it considers to be a US policy of destabilizing Arab countries. As Eugene Rumer and Andrew Weiss point out *"Russia was content with the status quo. It was not interested in democracy promotion; it was interested in stability. Russian leaders continue to see U.S. policy as very destabilizing for the entire region, including the recent spike in U.S. tensions with Iran."*⁴

Despite direct support of Bashar Assad's regime in Syria, Russia has acceptance from many countries in the region that normally oppose each other.

All these legacies color the present. This research shines a light

on how some forms of neo-Cold War logic correlate with the political views and emotions of populations in Egypt, Iran, Iraq, Israel, Jordan, Lebanon, Morocco, Qatar, Saudi Arabia, Tunisia, Türkiye⁵ and the United Arab Emirates (UAE). Sometimes even when the state's present day political position has changed. The participants of this survey tended to view the conflict within the context of global polarization and feel its effects on their countries through this lens.

Results to questions from their state's positionality in this war, over socio-economic impacts, to broader understandings of the global order show regional tendencies as well as national specificities. Can we infer from these results a tendency to suggest the resurgence of a cold war, albeit in a less balanced form than the previous one? Is anti-Americanism amongst these populations still a prevalent sentiment (or even analytical lens to be applied), or is that no longer the case? Is there nostalgia for the former Soviet superpower? Is the popularity of the idea of a multipolar world being exploited to justify Russia's position in this war? How do peoples of the Middle East feel involved or impacted by this conflict?

To analyze what the people of the Middle East think about the Russia-Ukraine War, it is crucial to consider a significant point: Do they view it through the prism of "empire" or "nation state"? Do they see the current conflict as a war between the Russian Empire—a spectral tsarist-Soviet continuity—and a rebel faction of this empire, Ukraine, which wishes to join another empire, either the European or the Western? Or do they perceive it as one of many ongoing conflicts between two global empires: Russia and the West?

Before answering these and the aforementioned questions, the methodology used for this study, as well as concomitant limitations, and insights arising from consideration of gender, age and location are explained. This is followed by a discussion of the survey results as well as deeper analysis of major trends before concluding with the main observations.

METHODOLOGY

The survey is based on a structured interview questionnaire prepared in coordination between FES and the two research firms contracted for data collection.

In Iran, Qatar and UAE, the survey was conducted by a leading global market research firm between January 11 and February 7, 2023, using computer assisted telephone interviewing (CATI) upholding the highest standards for market research, as set by the European Society for Opinion and Market Research (ESOMAR), in terms of data security, confidentiality and participant

3 Eugene Rumer, Andrew Weiss (2019): A Brief Guide to Russia's Return to the Middle East, Carnegie Endowment for International Peace, Retrieved under: <https://carnegieendowment.org/2019/10/24/brief-guide-to-russia-s-return-to-middle-east-pub-80134>

4 Ibid.

5 The Republic of Türkiye changed its official name from The Republic of Turkey on 26 May 2022 in a request submitted to the Secretary-General by the country's Minister of Foreign Affairs.

Cf. United Nations, Retrieved at: <https://www.un.org/en/about-us/member-states/turkiye>

safety. The telephone database used is representative of the population by city in all three countries. In Iran ($n^6=511$), the survey was conducted in Tehran, Isfahan, Mashhad and Shiraz. While only conducted in urban areas, the survey has drawn representative data from four of the five biggest cities in Iran⁷, where 76% of the populations live in urban areas⁸. In Qatar ($n=101$), the survey was conducted in Doha, Um Selal, Rayyan, Al Kor, Wakra and al Wakrah. In UAE ($n=100$), the survey was conducted in Dubai, Sharjah, Abu Dhabi, Ajman and Fujairah. The data has not been weighted but gender and age data were provided. The margin of error for these three countries differs based on the sample size in relation to the target population size, being 10% for Qatar and UAE and 4% for Iran.

For Egypt, Iraq, Israel, Jordan, Lebanon, Morocco, Saudi Arabia, Tunisia and Türkiye, this survey is based on interviews conducted on the internet between 22 and 30 November 2022, by YouGov, an international research data and analytics group headquartered in the UK. The survey is representative of the online population based in urban areas as follows: Egypt ($n=532$), Iraq ($n=400$), Israel ($n=511$), Jordan ($n=517$), Lebanon ($n=535$), Morocco ($n=535$), Saudi Arabia ($n=508$), Tunisia ($n=540$) and Türkiye ($n=522$). Samples were weighted according to gender and age for all of these nine countries, and additionally for geographical region in Iraq, Israel, Lebanon and Tunisia, as well as geographical region and national group in Saudi Arabia. The margin of error for these nine countries ranged between 4.3% and 4.7%, except for Iraq at 5.7%.⁹

At the time of analysis, FES took the decision not to include some questions in the final study in order to focus on specific aspects of political positioning, livelihoods and perceptions of global and regional powers.¹⁰ While consistency was ensured during the analysis, some questions were posed slightly differently by the two survey companies.

SEX, AGE, LOCATION

The data was disaggregated by sex, age and location in each of the surveyed countries. Representativity of the population was ensured by data collection companies, however no data was collected to check for intersectional representativity.

LIMITATIONS

The study included twelve countries in the MENA region with the aim of giving a diverse outlook on perspectives across the region. Depending on which countries are included, the Middle East and North Africa region comprises more than 20 countries.^{11 12} In view of this multiplicity, as well as restrictions of access to respondents in certain countries and budgetary confinements, the study does not cover all countries across the MENA region, limiting its scope and representativeness of the region overall. Notwithstanding these limitations, this study seeks to convey a comprehensive picture of the region by pursuing a balanced geographic distribution including countries from Maghreb, Mashreq and the Persian Gulf, as well as samples from non-Arab countries (Iran, Israel, Türkiye). In Israel, the survey was only conducted in areas delimited before the 1967 War. The survey was not conducted within the Palestinian Territories¹³ as a result of the constraints indicated above.

The analysis provided in this report is rooted in quantitative data without the possibility of triangulating this with qualitative data collected in parallel. While these results are reflective of the broader narratives and opinions in each of the surveyed countries, it is important to note that they cannot be generalized. However, it is possible to draw certain indicative conclusions on citizen's perspectives in their respective countries.

HISTORICAL AND ECONOMIC CONTEXTUALIZATION

RUSSIA'S HISTORIC ENGAGEMENT WITH THE MENA

For the past two centuries, the people of the Middle East have been comparing two types of imperialism: overseas imperialism from Western countries on the one hand, and continental Russian imperialism on the other. The questions and responses in this survey serve as a reminder that this has repercussions up until today. A substantial amount of discussions and opinions in Middle Eastern countries are still centered around comparing Russia's role with that of different Western powers. The question of whether the region is closer to Russia than to the West has arisen on several occasions over the past two centuries among the peoples of the Middle East and is now resurfacing. It intersects with the question of universality of norms (also leading to the question: whose norms?), views on global balance, perspectives on the diversification of international relations, and the relationship between individuals' geopolitical perspectives

6 n is the sample size.

7 Statistical Centre of Iran: Population and Housing Censuses, Retrieved at: <https://www.amar.org.ir/english/Population-and-Housing-Censuses>

8 Value for 2021. Based on Statista: Iran: Urbanization from 2011 to 2021, Retrieved at: <https://www.statista.com/statistics/455841/urbanization-in-iran/>

9 Sample sizes between countries differed due to factors such as population size and access to respondents. Similarly, the margins of error per country range between 4% and 5% due to differences in field access and local conditions.

10 The questionnaire, with all questions, can be consulted in the annex.

11 For instance, whereas the UN Economic and Social Commission for Western Asia (ESCWA) exhibits 20 member states, the Arab League has 22. The World Bank in contrast considers 19 countries to belong to the region. Not included in any of those are Israel, Türkiye or Iran.

12 League of Arab States. اعضاء ال لودل [Member States], Retrieved at: <http://www.lasportal.org/ar/aboutlas/Pages/CountryData.aspx>

13 Due to budgetary constraints and access limitations, we did not conduct the survey in the West Bank (including East Jerusalem) and the Gaza Strip.

and their personal knowledge of different societies and cultures.

Ever since its expansion towards the south in the late 18th century, Russia has been a major concern for the peoples of Western Asia. Tsarist Russia posed a challenge to the Ottoman Empire's supremacy in the Black Sea region and to the Qajar Dynasty of Iran's rule over Transcaucasia. In a few decades, Russia reversed regional roles and extended its dominance in both directions. As Russia moved South, specifically towards the Ottoman straits and the eastern Mediterranean, it caused concern among Western powers of the time and sparked what later became known as the Eastern Question.¹⁴

Between the 15th and the 18th century, Crimea and parts of today's Southern Ukraine were part of the Ottoman Empire, as were most of the surveyed (Arabic-speaking) countries and present-day Türkiye, with Ottoman Turks the ruling ethnicity. Interactions between the eastern Mediterranean area and the Black Sea region played a key role in what is called "La question d'Orient."¹⁵ The Russian Empire conquered Crimea during the Russo-Turkish War of 1787-1792. The war was fought between the Russian Empire and the Ottoman Empire, with Crimea being a significant theater of conflict. In 1783, following a successful military campaign, Russia formally annexed Crimea, effectively bringing it under Russian control. This marked the beginning of Russian rule in the region and Crimea remained part of the Russian Empire until the dissolution of the empire in 1917.

As the French historian Henry Laurens (2017) pointed out, the Russian Empire purposefully sought to settle and colonize, inspired by the idea of continental imperialism, as it expanded from its heartland towards the south.¹⁶

The Soviet Union, which represented both a rupture and a continuity with this tsarist past, proposed itself a friend of all national liberation movements in the Middle East at the Conference of Baku in 1920. This proved difficult at the time and has continued to pose challenges ever since. Years later, the Israeli-Arab conflict, dating back to the end of the British Mandate on Palestine in 1948 and the Arab-Israeli War that followed, further complicated Moscow's position. The Soviets were the first to recognize the State of Israel, which many Arabs consider to be

unacceptable.

Nonetheless, the Arab republics that strived for pan-Arabism leaned toward the Soviet side during the Cold War, following an anti-Western imperialism approach. Additionally, they were attracted to what can be called the Soviet model of development,¹⁷ despite their rejection of communism. Two of the countries included in this survey, Egypt and Iraq, formed military alliances with the Soviet Union for a limited time period during the Cold War, lasting from the mid-1950s to the early 1970s.

After the Suez Crisis in 1956, Soviet influence expanded to Egypt and the wider Arab world. The Soviet Union provided Egypt with economic and technical assistance, helping to build infrastructure and industrial capacity. Soviet experts, especially after the 1967 Six Day War, worked in Egypt in fields such as energy, industrial infrastructure, military industry and agriculture.

The Soviet Union's influence in Egypt began to decline in the 1970s, as the region became more fragmented and the Soviet economy struggled. Egyptian president Anwar Sadat's decision to remove Soviet experts from the state in 1972 was a significant event, motivated as it was by a desire to improve relations with the United States (US) and the West.¹⁸

According to Walter Laqueur,

*"The Soviet leaders were aware of the mental reservations of their allies in the Middle East, but this did not worry them unduly for they were convinced that the logic of events would gradually drive the Arab Leaders (or their successors) towards closer political collaboration with the Soviet Union, and that an ideological rapprochement would eventually follow."*¹⁹

This pertains to the theory of non-capitalist development embraced by Moscow, which facilitated an anti-imperialist evolution according to the Soviet perspective, characterized by socially progressive policies but without communist governance. This theory also facilitated the dissemination of a Soviet developmental model to countries such as Egypt.

At the same time, the global Cold War was replicated in the region with an Arab Cold War, mainly between the conservative monarchy Saudi Arabia on one side and the Arab revoluti-

14 Matthew S. Anderson (1966): *The Eastern Question 1774-1923: A Study in International Relations*. New York: St Martin's Press, p. 44.

15 Henry Laurens (2017): *Les Crises d'Orient I, 1768-1914*, Paris: Fayard, p. 25.

16 Ibid; original quote: "La progression russe vers le sud s'accompagne d'une politique de peuplement et de colonisation. Un véritable front pionnier organisé par l'État accompagne l'avancée militaire. Contrairement au modèle britannique ultramarin, celui de la Russie est une dilatation permanente du noyau géographique initial dans la logique d'impérialisme continental."; English translation: "Russia's southward advance was accompanied by a policy of settlement and colonization. A veritable pioneer front organized by the state accompanied the military advance. Unlike the British ultramarine model, Russia's was a permanent expansion of the initial geographical core, in line with the logic of continental imperialism."

17 The Soviet model of development, implemented in the USSR from 1922 to 1991, involved central planning of the economy, state ownership of production and a one-party political system. It led to rapid industrialization and social programs but also faced inefficiencies and limited individual freedoms, ultimately resulting in its collapse.

Cf. Library of Congress Revelations from the Russian Archives. Internal Workings of the Soviet Union, Retrieved at: <https://www.loc.gov/exhibits/archives/intn.html>

18 Craig A. Daigle (2004): *The Russians are going: Sadat, Nixon and the Soviet presence in Egypt*, Middle East Vol. 8, No. 1 pp.1-15.

19 Walter Laqueur (1975): *The Struggle for the Middle East, The Soviet Union and the Middle East 1958-68*, Routledge, p. 57.

onary authoritarian regimes (Egypt, Iraq, Libya and Syria) on the other.

During the Cold War, Riyadh's close alliance with the US caused tension with the Soviet Union. At the same time, the nature of the Saudi regime was a matter for reflection in Moscow. The historian Alexei Vassiliev sees the development of Saudi Arabia as an unusual evolution from a nomad society to an urban society within a few generations. His view on Saudi history following the collapse of the Soviet Union, as well as his bibliographical portrayal of King Faisal, suggests that Moscow, especially the Ministry of Foreign Affairs, has always had a special interest in creating links with Riyadh.²⁰

The Soviet Union also faced a complicated situation with Iran and its Islamic Revolution. The doctrine of Ruhollah Imam Khomeini, supreme leader of Iran during the 1980s, referred to the US as "the Great Satan" and the Soviet Union as "*the Lesser Satan*."²¹

Nevertheless, this did not prevent the development of relations between Moscow and Tehran, just as these relations did not prevent the continuation of relations between the Soviets and Iraq, which at the time was fighting against Iran. Simultaneously, Iran reduced its engagement in Afghanistan against the Soviets, and only supported specific ethnic groups directly connected to Tehran.²²

With the collapse of the Soviet Union, Russia had to relinquish its ideological obligations in the Middle East, as it no longer had a defined developmental model to promote in the region. Russia exerted a two card foreign policy game: defending the right of each country to choose its political regime, which meant no external interference in authoritarian Arab regimes, while forging bilateral relations with most of the countries of the region.

Moscow's inability to halt the war against Iraq after Saddam Hussein's invasion of Kuwait in 1990 affected its imperial image in the region throughout that decade. Its influence waned and it lost significance over the 1990s, despite being, alongside the US, one of the two primary sponsoring parties of the Middle East Peace Process.²³

Following the collapse of the Soviet Union, the MENA region became a stage for US unipolar order for around a decade. However, since the beginning of the new millennium and with

Putin's rise to power, the region has become more ambivalent towards Russia. On the one hand, Russia is seen as a counterbalance to the US,²⁴ but on the other hand, its intervention in Syria has caused controversy and animosity.

CONCEPTUALIZING SOCIO-ECONOMIC IMPACTS ON LIVELIHOODS

The Russia-Ukraine War has complex impacts on the MENA region. On the one hand, European countries seek to decrease their reliance on Russian gas by turning to gas and oil producing countries in the MENA region. Germany for instance is aiming for independence from Russian oil and gas by 2024,²⁵ and since the start of the Russia-Ukraine War in February 2022, Austria, France, Germany, Greece, Hungary, Italy, the Netherlands and Poland have signed deals with Bahrain, Oman, Qatar, Saudi Arabia, and the UAE.²⁶ This presents an opportunity for these MENA states to diversify their economic ties and policies. On the other hand, the ongoing conflict and global instability have had a significant impact on daily life in the MENA region.

While acknowledging industrial disparity between Russia and most Middle Eastern countries, Russia's reliance on oil and gas exports makes it primarily a rentier state. This characteristic is also shared by many MENA nations, such as Saudi Arabia, Iran and Iraq, which heavily depend on oil exports for their economic growth and development. In addition, Russia and some MENA countries share a commonality in the concentration of power and resources among a small elite, often associated with the ruling political or economic class. This can result in a lack of transparency and accountability in government decision-making, as well as an unequal distribution of wealth and resources within a society.²⁷

Russia remains the world's largest exporter of crude and refined oil products, according to the International Energy Agency (IEA). It is the second largest exporter of crude oil behind Saudi Arabia,²⁸ and the world's second largest producer of natural gas

20 Alexei Vassiliev (1997): *The History of Saudi Arabia*, Saqi Books.

21 Mark Katz (2010): *Iran and Russia*, Chapter 43; In: Robin B. Wright (ed.): *The Iran Primer: Power, Politics and U.S. Policy*, United States Institute of Peace. p. 186.

23 The Middle East peace process refers to ongoing diplomatic efforts aimed at resolving the Israeli-Palestinian conflict and achieving a comprehensive and lasting peace agreement between Israel and its neighboring Arab countries. The United States and Russia have played significant roles in the Middle East peace process by actively engaging in diplomacy, mediating negotiations and supporting peace initiatives to facilitate a resolution.

24 Eugene Rumer, Andrew Weiss (2019): *A Brief Guide to Russia's Return to the Middle East*, Carnegie Endowment for International Peace, Retrieved under: <https://carnegieendowment.org/2019/10/24/brief-guide-to-russia-s-return-to-middle-east-pub-80134>

25 Frank Umbach, GIS (2022): *Risks and Requirements for German Gas and Energy Policy*: <https://www.gisreportsonline.com/r/german-gas-policy>

26 Cinzia Bianco, European Council on Foreign Relations (2023): *Renewable Relations: A strategic approach to European energy cooperation with the Gulf states* <https://ecfr.eu/publication/renewable-relations-a-strategic-approach-to-european-energy-cooperation-with-the-gulf-states/>

27 Center for Strategic and International Studies (2023): *Russia in the Middle East After Ukraine*, Retrieved at: <https://www.csis.org/analysis/russia-middle-east-after-ukraine>

28 Al Jazeera Staff (2022), Infographic: How much oil does Russia produce? Retrieved at: <https://www.aljazeera.com/news/2022/12/5/infographic-how-much-oil-does-russia-produce#:~:text=Russia%20is%20the%20world's%20largest,coming%20behind%20only%20Saudi%20Arabia>

behind the US.²⁹

A sharp increase in commodity prices amid ongoing sanctions has placed a number of countries across the MENA, that import the majority of their fuel from Russia, under additional strain.³⁰ Concerns for the region, especially for vulnerable groups, continue to rise as the war continues and its impacts intersect with regional political and economic unrest in the MENA.

According to the World Bank, 20% of the world's food insecure population resides in the MENA region.³¹ MENA additionally exhibits the highest per capita consumption of wheat globally, amounting to approximately 128 kg per capita, or twice the world average.³² Ukraine and Russia supply over half of that amount.³³

Egypt, the world's largest wheat importer, at a total of 12 to 13 million tons every year, worth \$5.2 billion according to the Observatory of Economic Complexity (OEC).³⁴ It imports over 80% of its wheat from Russia and Ukraine³⁵ and has been particularly affected with regard to its food security.^{36,37} The MENA region imported over 36 million tons of wheat in 2021 from Russia and Ukraine, constituting 30% of global wheat imports,

according to analysis by the US Department of Agriculture.³⁸ While increased prices have directly affected the cost of food, transportation and other goods and have also led to supply chain disruptions that could fracture already-fragile economies, according to a report from the Tahrir Institute for Middle East Policy (TIMEP).³⁹

The Egyptian government has since sought to diversify wheat sources, finding alternative producers such as India,⁴⁰ the US, Canada, Australia, Argentina and Brazil.⁴¹ In addition to wheat, Egypt, and other countries in the region, including Iraq and Iran, relied on Ukraine for much of their cooking oil. Egypt previously imported over 54% of its sunflower oil from Ukraine.⁴²

Lebanon similarly imports more than 80% of its wheat supply from Ukraine—the current shortage now adds an additional layer of crisis to its ongoing, internal economic hardship.⁴³ By 2022, wheat flour was already up 47% in Lebanon, with the cost of a basic food basket registering an annual increase of 351% – the highest increase in the region.⁴⁴

Other countries across the MENA region are also heavily reliant on imports of key food products from Ukraine and Russia. Although not surveyed as part of this study, conflict-ridden

29 International Energy Agency (IEA) (2022): Energy Fact Sheet: Why does Russian oil and gas matter? Retrieved at: <https://www.iea.org/articles/energy-fact-sheet-why-does-russian-oil-and-gas-matter>

30 Jihad Azour, Jeta Menkulasi and Rodrigo Garcia-Verdu (2022): Middle East and North Africa's Commodity Importers Hit by Higher Prices, International Monetary Fund, IMF Blog, Retrieved at: <https://www.imf.org/en/Blogs/Articles/2022/05/24/blog-mena-commodity-importers-hit-by-higher-prices>

31 Ferid Belhaj and Ayat Soliman (2021): MENA has a food security problem, but there are ways to address it, World Bank Blog, Retrieved at: <https://www.worldbank.org/en/news/opinion/2021/09/24/mena-has-a-food-security-problem-but-there-are-ways-to-address-it>

32 Arab Reform Initiative (2022): The impact of the Ukraine war on the Arab region: Food insecurity in an already vulnerable context, Retrieved at: <https://www.arab-reform.net/publication/the-impact-of-the-ukraine-war-on-the-arab-region-food-insecurity-in-an-already-vulnerable-context/>

33 Ibid.

34 The Observatory of Economic Complexity (OEC): Egypt (EGY) Exports, Imports, and Trade Partners, Retrieved at: [https://oec.world/en/profile/country/egy#:~:text=Overview%20In%202021%2C%20Egypt%20was,Economic%20Complexity%20Index%20\(ECI\)%20](https://oec.world/en/profile/country/egy#:~:text=Overview%20In%202021%2C%20Egypt%20was,Economic%20Complexity%20Index%20(ECI)%20)

35 Kibrum Abay et al (2022): Russia-Ukraine crisis poses a serious threat to Egypt – the world's largest wheat importer, The Conversation, Retrieved at: <https://theconversation.com/russia-ukraine-crisis-poses-a-serious-threat-to-egypt-the-worlds-largest-wheat-importer-179242>

36 CNBC (2023): Oil prices dive to 15-month lows on bank fears, Retrieved at: <https://www.cnbc.com/2023/03/17/oil-steadies-as-investors-take-stock-of-banking-crisis.html>

37 Jason Beaubien (2022): Russia's invasion of Ukraine may cause havoc for wheat-importing Mideast nations, Retrieved at: <https://www.npr.org/2022/02/25/1082893801/russias-invasion-of-ukraine-may-cause-havoc-for-wheat-importing-mideast-nations>

38 US Department of Agriculture (2023): Grain: World Markets and Trade, Retrieved at: <https://apps.fas.usda.gov/psdonline/circulars/grain.pdf>

39 Basma Alloush and Amal Rass (2022): How Russia's War in Ukraine is Impacting the MENA Region, The Tahrir Institute for Middle East Policy, Retrieved at: <https://timep.org/explainers/how-russias-war-in-ukraine-is-impacting-the-mena-region/#:~:text=The%20entire%20MENA%20region%20is,percent%20of%20the%20global%20population>

40 John Reidy (2022): Egypt approves wheat from India, World-Grain.com, Retrieved at: <https://www.world-grain.com/articles/16783-egypt-approves-wheat-from-india>

41 Arvin Donley (2022): Egypt seeks sources to fill wheat needs, World-Grain.com, Retrieved at: <https://www.world-grain.com/articles/17185-egypt-announces-another-wheat-tender>

42 Al-Monitor Staff (2022): Iran, Iraq, Egypt rely on Ukraine for sunflower oil, Al-Monitor, Retrieved at: <https://www.al-monitor.com/originals/2022/02/iran-iraq-egypt-rely-ukraine-sunflower-oil#ixzz7raH6uWXE>

43 Emma Graham (2022): With bread prices skyrocketing, Lebanon waits for crucial wheat imports and international aide, CNBC, Retrieved at: <https://www.cnbc.com/2022/07/27/lebanon-waits-for-crucial-wheat-imports-and-international-aide.html>

44 World Food Programme (WFP) (2022), War in Ukraine pushes Middle East and North Africa deeper into hunger as food prices reach alarming highs, Reliefweb, Retrieved at: <https://reliefweb.int/report/lebanon/war-ukraine-pushes-middle-east-and-north-africa-deeper-hunger-food-prices-reach>

countries such as Libya⁴⁵ and Yemen⁴⁶ both depended on food imports from Ukraine, especially grains and vegetables. Importantly, conflict-ridden Sudan imports 90% of its wheat from Russia, but has seen a 60% drop in imports since the Russia-Ukraine War began⁴⁷ – a number the country has not been able to balance with domestic wheat production, despite accounting for 40% of the total agricultural lands in the Arab region, due to ongoing political and economic instability.⁴⁸ Sudan's deteriorating economic situation is further compounded by an international aid freeze, following a military coup in late 2021 that left the country unable to sustain its wheat needs,⁴⁹ and an armed conflict which broke out in April 2023.

Syria also relied on Russia for the majority of its wheat. Even prior to the Russia-Ukraine War the country faced an estimated two million ton wheat shortage, now greatly exacerbated by the conflict.⁵⁰

Certain countries in the region, namely Syria, Yemen, Libya, Sudan,⁵¹ Lebanon and, more recently, Egypt, are particularly vulnerable due to existing crises that predate or exist in parallel with the Russia-Ukraine War. These countries have a large presence of vulnerable groups, including refugees and internally displaced populations, which places additional strain on their ability to weather socio-economic ruptures.

In Egypt, nearly 90% of the population relies on a government rationing system to access subsidized bread, and the plummeting value of the Egyptian pound during the recent economic crisis has led to comparisons with Lebanon's dire situation.

Lebanon meanwhile continues to endure what the World Bank calls one of the world's worst economic crises globally since the 1850s,⁵² due to deliberate inaction from the Lebanese government.⁵³ Over 80% of Lebanon's population lives in multidimensional poverty, and close to 90% of the country's Palestinian and Syrian refugee population lives under "minimum survival conditions" according to the United Nations Office of the High Commissioner for Human Rights (OHCHR).⁵⁴

While this survey did not cover all MENA countries, understanding the realities of countries like Yemen and Syria, which also have significant vulnerable populations, is crucial for comprehending broader regional dynamics. The impact of the Russia-Ukraine War on food and fuel security in Yemen and Syria is particularly acute for these already-vulnerable groups.⁵⁵

45 REACH Initiative (2022): Libya: Assessment of the Libyan wheat supply chain – Quantitative and qualitative assessment of the short-term impact of the escalated conflict in Ukraine on the Libyan wheat supply chain, Reliefweb, Retrieved at: <https://reliefweb.int/report/libya/libya-assessment-libyan-wheat-supply-chain-quantitative-and-qualitative-assessment-short-term-impact-escalated-conflict-ukraine-libyan-wheat-supply-chain-june-2022>

46 Peyvand Khorsandi (2022): Yemen: Millions at risk as Ukraine war effect rocks region, World Food Programme, Retrieved at: <https://www.wfp.org/stories/yemen-millions-risk-ukraine-war-effect-rocks-region>

47 Xinhua (2022): Sudan faces deteriorating food shortage or even crisis in 2022: Retrieved at: <https://english.news.cn/20220523/3b293e1d41a94d0987cba4f037977e0b/c.html#:~:text=%22It%20is%20known%20that%20Sudan,Sudanese%20economic%20expert%2C%20told%20Xinhua>

48 Baher al-Kady (2022): Can Sudan replace Ukraine as the breadbasket for the MENA region?, Al-Monitor, Retrieved at: <https://www.al-monitor.com/originals/2022/05/can-sudan-replace-ukraine-breadbasket-mena-region#ixzz80BffF59r>

49 Xinhua (2022): Sudan faces deteriorating food shortage or even crisis in 2022: experts, Retrieved at: <https://english.news.cn/20220523/3b293e1d41a94d0987cba4f037977e0b/c.html#:~:text=%22It%20is%20known%20that%20Sudan,Sudanese%20economic%20expert%2C%20told%20Xinhua>

50 Hari Prasad (2022): Russia's Invasion of Ukraine Complicates the Situation in Syria, The Carter Center, Retrieved at: <https://www.cartercenter.org/news/features/blogs/2022/russias-invasion-of-ukraine-complicates-the-situation-in-syria.html>

51 These four countries were not surveyed in this study; however, conflict, socio-economic ruptures and war have effects beyond borders and the presence of refugees from these countries in surveyed countries can impact on perceived livelihood situations.

52 World Bank (2021): Lebanon Sinking into One of the Most Severe Global Crises Episodes, amidst Deliberate Inaction, Retrieved at: <https://www.worldbank.org/en/news/press-release/2021/05/01/lebanon-sinking-into-one-of-the-most-severe-global-crises-episodes>

53 World Bank (2022): Lebanon's Crisis: Great Denial in the Deliberate Depression, Retrieved at: <https://www.worldbank.org/en/news/press-release/2022/01/24/lebanon-s-crisis-great-denial-in-the-deliberate-depression>

54 OHCHR (2022), Lebanon: UN expert warns of 'failing State' amid widespread poverty, Retrieved at: <https://www.ohchr.org/en/press-releases/2022/05/lebanon-un-expert-warns-failing-state-amid-widespread-poverty>

55 World Food Programme (WFP) (2022): WFP Syria Situation Report #5, Retrieved at: <https://api.godocs.wfp.org/api/documents/babccf693ae543ef9ce51155fa387872/download/?ga=2.154624888.1748789926.1657143885-871784027.1657143885>

RESULTS AND DISCUSSION

I. Perceptions of the War: Contextualizing Political Positionalities across the MENA

Survey respondents from Iraq, Jordan, Lebanon, Morocco, Saudi Arabia, Tunisia, Türkiye, Israel and Iran largely saw the Russia-Ukraine War as falling within the context of a larger geopolitical struggle between Russia and the West. This view intersects with the political and historical timeline that led to the eruption of the Russia-Ukraine War.⁵⁶

Cold War Revival?

Russia annexed Crimea in March 2014. This was then followed by the formation of two Russia-backed separatist quasi-states, namely the Donetsk People's Republic and the Luhansk People's Republic. Multiple ceasefires failed between 2014 and 2015 and tensions remained high between Russia and Ukraine — and in turn, also between Russia and the US and European Union (EU).^{57,58} For comparison, this view is more divergent in Western countries where scholars debate the larger nature of the war, with some stating that it is not a proxy war.⁵⁹

The ongoing war has also been attributed to a culmination of regional and international political disputes, dating back to the Cold War era – with one report in Foreign Policy even claiming that the “classic Cold War conundrum is back.”⁶⁰ Conversations around the re-emergence of the Cold War have additionally placed the US at the center of opinions and political positionality on the Russia-Ukraine War.

WHO IS RESPONSIBLE FOR THE WAR?

When asked about who they consider mainly responsible for the war in Ukraine, with possible response options being Russia, Ukraine, the US, the EU, or another country altogether, 50.1% of respondents across the twelve MENA countries surveyed said they felt Russia was responsible, with the US coming in second (26.7%).

Israeli and Iranian respondents gave the highest majority responses, with 87% and 71% respectively, holding Russia responsible for the Russia-Ukraine War. Just 5% of Israeli respondents blamed the US. Other countries surveyed were more divided in their response, with the next highest majority view in Türkiye with 52% and Morocco with 49% that Russia was responsible for the war.

Israeli and Iranian respondents' positionality was significantly higher than in the other ten MENA countries surveyed, indicating differences in government and society positionality. These responses indicate a closer alignment with the Western political narrative on this conflict and diverge from the rest of the region overall. This finding seems especially interesting amidst the diplomatic rifts that usually mark these two countries' positionality on topics and conflicts within the region. **(Graph 1 next page)**

Across the rest of the surveyed countries, responses were more evenly distributed between Russia and the US. In Iraq, Saudi Arabia, UAE and Tunisia, the differences in values are smaller in percentage than in others, with generally pluralities blaming Russia but not amounting to majorities.

Across respondents in all countries, a minority said they thought that the EU was responsible for the war. On average, fewer than 4% of respondents said they held any actor responsible other than Russia, the US, the EU, or Ukraine. This indicates a clear perception that this war is dominated by the two former superpowers, further confirmed by later questions and answers.

Overall, pluralities everywhere blamed Russia – just with different intensities – mostly aligning with their state's political positionality. Opinions across the region were more divided on questions around sanctions, economic impacts of the war and Russia's role in the region, explored further below.

Historically, countries across the MENA region have politically positioned themselves at different ends of the global block confrontation, with US support to Israel since the 1950s, comprehensive US arms exports to Türkiye, Saudi Arabia and later Egypt, and assistance by the former Soviet Union to Arab regimes including Egypt under Gamal Abdel Nasser, Baathist Syria and Iraq. The region has often been referred to as “the theater of the

56 Shane Harris, Karen DeYoung, Isabelle Khurshudyan, Ashley Parker, Liz Sly (2022): Road to war: U.S. struggled to convince allies, and Zelensky, of risk of invasion, Washington Post, Retrieved at: <https://www.washingtonpost.com/national-security/interactive/2022/ukraine-road-to-war/>

57 Reuters (2022): Factbox: What are the Minsk agreements on the Ukraine conflict? Reuters, Retrieved at: <https://www.reuters.com/world/europe/what-are-minsk-agreements-ukraine-conflict-2022-02-21/>

58 Human Rights Pulse (2022): Russian Recognition of Donetsk And Luhansk: Legal Analysis, Retrieved at: <https://www.humanrightspulse.com/mastercontentblog/russian-recognition-of-donetsk-and-luhansk-legal-analysis>

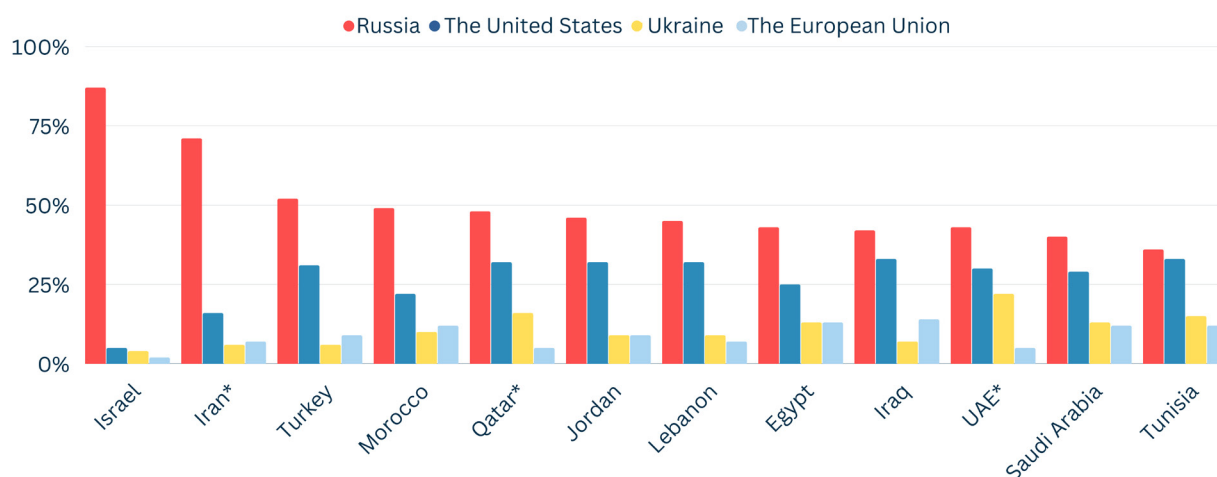
59 Lawrence Freedman (2023): Ukraine is not a proxy war. It is Kyiv – not the West – which has set Ukraine's war aims, The New Statesman, Retrieved at: <https://www.newstatesman.com/world/europe/ukraine/2023/01/ukraine-proxy-war-russia-vladimir-putin-nato>

60 M.E. Sarotte (2022): The Classic Cold War Conundrum Is Back, Foreign Policy, Retrieved at: <https://foreignpolicy.com/2022/07/01/iron-curtain-russia-ukraine-cold-war/>

Cold War” by scholars.⁶¹⁶²

Recent developments in diplomatic relations between Iran and countries in the region may serve as an indicator of the state’s positionality on both a regional and international scale.⁶³ A recent agreement between Saudi Arabia and Iran to resume diplomatic relations is yet to be assessed for its regional impact, its potential effect on US influence in the Middle East, and whether it could repair severed ties between Iran and the US in the long-term. Meanwhile, relations between Iran and Russia have also expanded exponentially in recent months with direct implications for the Russia-Ukraine War.⁶⁴

WHICH COUNTRY DO YOU CONSIDER MAINLY RESPONSIBLE FOR THE WAR IN UKRAINE?

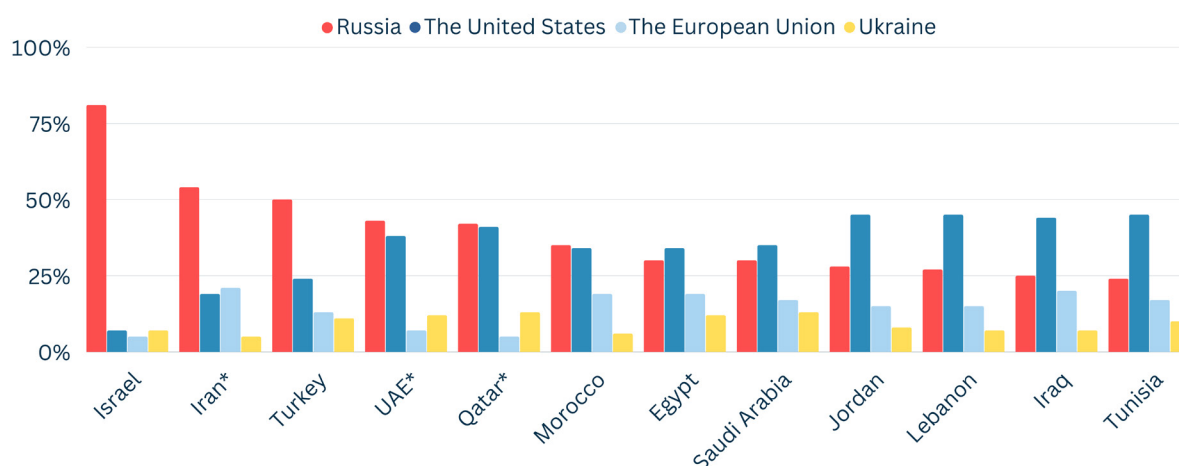


Graph 1

WHO IS RESPONSIBLE FOR CONTINUING THE WAR?

Survey responses indicate that the MENA region is divided when it comes to who is continuing the conflict between Russia and Ukraine, with neither the US or Russia receiving majority assertions of responsibility at a regional level. **(Graph 2)**

WHICH COUNTRY DO YOU CONSIDER MORE AT FAULT FOR CONTINUING THE RUSSIA-UKRAINE CONFLICT?



Graph 2

61 Nikki R. Keddie (1992): The End of the Cold War and the Middle East, Diplomatic History, Retrieved at: <https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1467-7709.1992.tb00490.x>

62 POMED (2020): US Military Assistance to Egypt: Separating Fact from Fiction, Retrieved at: <https://pomed.org/wp-content/uploads/2018/01/Egypt-FMF-2.pdf>

63 Al Jazeera (2022): The troubled history of Iran-US relations, Retrieved at: <https://www.aljazeera.com/gallery/2022/11/29/iran-us-relations-timeli>

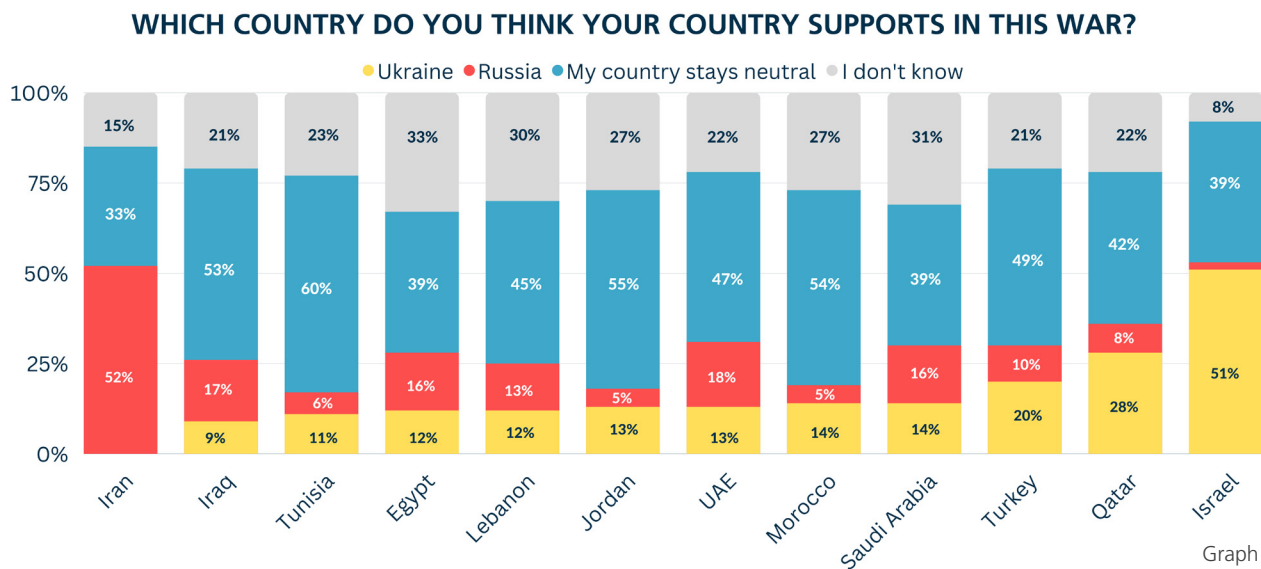
64 Diana Galeeva (2023): What Iran’s growing Russia ties mean for the war in Ukraine, Arab News, Retrieved at: <https://www.arabnews.com/node/2243596>

Though respondents across all participating countries tended to blame Russia for instigating the war, the majority in most countries surveyed did not blame Russia for continuing it: six out of the twelve countries surveyed held the US most responsible, namely Tunisia (45%), Lebanon (45%), Jordan (45%), Iraq (44%), Saudi Arabia (35%) and Egypt (34%). In Morocco, Qatar (41%) and the UAE (38%), the plurality of the blame for the continuation is on Russia, however racing head to head with the blame for the US. In Iran, Morocco, Egypt, Saudi Arabia, Iraq and Tunisia, the blame for the EU continuing the war surpasses 20% of respondents per respective country.

Exceptionally high blame for Russia continuing the war was registered amongst respondents in Israel at 80% (and 7% blaming the US). In Iran 54% of respondents blamed Russia and 19% blamed the US and Türkiye here 50% of the sample blamed Russia and 24% blamed the US. Interestingly, participants from the non-Arab countries of the region (Israel, Iran, Türkiye) overwhelmingly blamed Russia, while Arab country participants placed more responsibility for the continuation of the war with the US.

NEUTRALITY - WAR IMPACTS - RUSSIA/US-TRUST IN THE REGION

MENA residents surveyed tended to view their country as taking a “neutral” position on the Russia-Ukraine War. Over 50% of respondents from Tunisia, Jordan, Morocco and Iraq said that their country remained neutral in the conflict, for instance. Other respondents that shared this view constituted pluralities in Türkiye (49%) and Lebanon (45%), as well as Egypt, Israel and Saudi Arabia, where this viewpoint dominated 39% of the responses. **(Graph 3)**

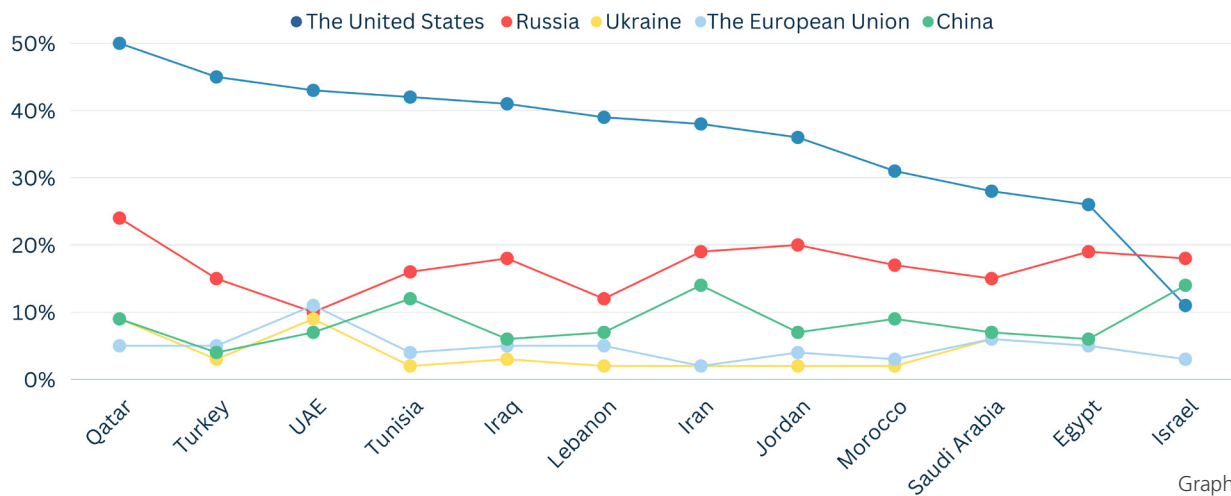


In most countries surveyed more respondents said they did not know who their country supported than said they thought either Russia or Ukraine. Exceptions included Iran, where a narrow majority said their country supports Russia; Israel, where a narrow majority said their country supports Ukraine and Qatar where 28% said Ukraine.

WHO BENEFITS IF THE WAR CONTINUES?

Participants were asked to evaluate who they think benefits most from the Russia-Ukraine War. Responses broadly reflected the positions taken by their states. Most felt that either Russia or the US are the primary beneficiaries of the war in Ukraine, though the data additionally highlights high rates of uncertainty about who benefits most. Largely, respondents across all surveyed countries, except for those from Israel, said they thought that the US benefits most from the war, with Russia coming in second across the sample. **(Graph 4 next page)**

WHO WOULD YOU SAY IS BENEFITTING THE MOST FROM THE WAR IN UKRAINE?



Graph 4

Respondents in Qatar more than anywhere else felt that the US stood to benefit most, at 50% of the sample. The country with the highest percentage of respondents that thought Russia benefits the most was also Qatar, at 24%, followed by Jordan at 20% and Egypt and Iraq at 19% and 18% percent respectively. Similar to responses across other questions in this survey, these responses fall in direct correlation with not only the positionality of states towards the Russia-Ukraine War, but additionally with regional emerging realities as well as at a national level.

The most polarized response came from Israeli respondents, where 42% said that they did not know who benefited more – followed by 18% who thought Russia benefited most and 14% who said China did. This is one of the many indications of how it is perceived that China is continuing to consolidate its role in the MENA region, adding extra complexity to regional political alignments as it competes with the US for regional influence and power.

Perhaps most noteworthy here is the ambiguity of response from Turkish respondents, where 45% of said they thought that the US stood to benefit most from the Russia-Ukraine War, 15% Russia, 3% Ukraine, 5% the EU, 4% China, 5% other countries and 23% felt they didn't know. This reflects the complexity of Türkiye's foreign policy priorities, its NATO membership and its bilateral relations with Russia and the US along broader lines. Since the beginning of the Russia-Ukraine War, Türkiye has remained the "friendliest" of all the NATO countries toward Russia. It has not imposed direct sanctions or canceled flights between the two countries, and has continued to cooperate closely with Russia on a number of mutually beneficial issues.⁶⁵ Türkiye has thus far walked a diplomatic tightrope around this conflict, balancing adroitly through energy partnerships with Russia, arms sales to Ukraine and functioning as a buffer zone for the West.

Lastly, crucial to note is the unusually high rate of respondents who said they didn't know who benefits the most from this conflict. Israeli respondents were most unsure, with 42% answering "I don't know." More than 20% of respondents across all countries were unsure, except Qatar with 4%.⁶⁶

Regional opinions on who benefits from the war intersect with larger political undertones, and are closely aligned with bilateral relations between states, as well as the history of the region itself. When comparing results for the three questions on who started the war (**Graph 1**), who is responsible for its continuation, (**Graph 2**), as well as who is benefiting from it (**Graph 4**), the blame for the cause of the conflict is placed mainly on Russia amongst respondents in all survey countries, while continuation and benefit weigh closer towards the US, particularly amongst those countries which depend on the warring countries for their wheat and thus in which respondents have underlined food security challenges as main concerns (e.g. Egypt, Lebanon, Iraq, Tunisia). This is discussed to a larger extent in the next parts of the study.

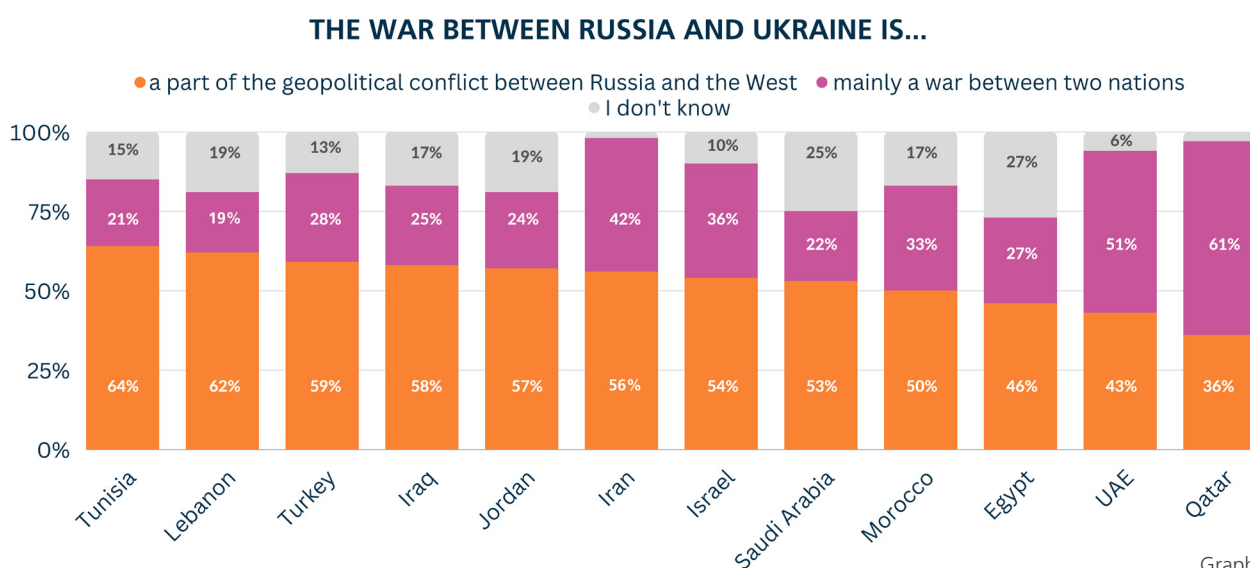
⁶⁵ Iliya Kusa (2022): From Ally to Mediator: How Russia's Invasion Has Changed Ukraine-Türkiye Relations, Carnegie Endowment for International Peace, Retrieved at: <https://carnegieendowment.org/politika/88097>

⁶⁶ "I don't know" answers are not displayed in the graphical visualization.

PART OF A LARGER CONFLICT?

The survey asked participants to say whether they thought the Russia-Ukraine War is a conflict between two countries fighting for power and territory, or one of many battlefields in a larger conflict between Russia and the West. In the previous section, this was briefly touched upon through perceptions of who benefits most from the war. The high proportion of respondents indicating they thought the US benefits the most, when the US is not an active party in the war, suggests a tendency towards the larger conflict view.

More Tunisian respondents than in any other country surveyed said that the war is part of a larger Russia-West conflict, at 64%. This was closely followed by Lebanese respondents at 62%. Overall, 50% of respondents or more from all countries except Egypt, UAE and Qatar shared this view. The UAE and Qatar were the only countries where a majority said they saw the Russia-Ukraine War as a conflict mainly between two countries fighting each other for power and territory. **(Graph 5)**



Russia's attempts to deny Ukraine's independence and right to exist as a democracy are often couched in 'geocultural' discourse, based on an alleged incompatibility between Russian and Western values – and, consequently, by incompatible political systems.^{67,68} Understanding the historical and political trajectories that culminated in the 2022 Russia-Ukraine War is pivotal to attempting to understand how they have shaped, and continue to shape, global affairs and relations between Russia and Ukraine as well as relations between Russia and the West. Russia and Ukraine share a heritage that goes back more than a thousand years, to a time when Kyiv, now Ukraine's capital, was at the center of the first East Slavic state, Kyivan Rus—which both Russia and Ukraine consider their cultural ancestor.⁶⁹

Following Ukraine's declaration of independence after the Soviet Union collapsed in 1991, uniting the country proved a difficult task.⁷⁰ Establishment of a sense of "Ukrainian nationalism" was challenging. To this day that sense is not as deep in the east of the country as it is in the west, according to analysts.⁷¹ The transition to democracy and capitalism has been described as "painful and chaotic," as many Ukrainians, especially in the east, long for more stability.⁷² Although Ukraine has shifted more toward Western Europe in its recent past, a strong connection with Russia persists for many, particularly in the Russophone East of the country.⁷³

67 Kristina Stoeckl and Dmitry Uzlauer (2022): Russia believed the West was weak and decadent. So it invaded. The Washington Post, Retrieved at: <https://www.washingtonpost.com/politics/2022/04/15/putin-patriarch-ukraine-culture-power-decline/>

68 Kate Tsurkan (2022): Putin has forced Ukrainians to view Russian culture as a weapon of war, Atlantic Council. Retrieved at: <https://www.atlanticcouncil.org/blogs/ukrainealert/putin-has-forced-ukrainians-to-view-russian-culture-as-a-weapon-of-war/>

69 Eve Conant (2022): Russia and Ukraine: the tangled history that connects—and divides—them, Retrieved at: <https://www.nationalgeographic.com/history/article/russia-and-ukraine-the-tangled-history-that-connects-and-divides-them>

70 Ibid.

71 Ibid.

72 Ibid.

73 Tucker Reals and Alex Sundby (2022): Russia's war in Ukraine: how it came to this, CBS News, Retrieved at: <https://www.cbsnews.com/news/ukraine-news-russia-war-how-we-got-here/>

Since the post-Soviet era, Russia has found itself in a state of permanent conflict, sometimes in Chechnya, sometimes against Georgia, and in the Donbass and Syria, before the current war. After widespread protests in Kyiv leading to a change in Ukraine's government in 2014, Russia annexed the Ukrainian peninsula of Crimea, subsequently supporting a separatist insurgency in Eastern Ukraine, and eventually the self-declared People's Republics of Luhansk and Donetsk.⁷⁴ The most recent cycle of violence, that began when Russia invaded Ukraine in February 2022, has been viewed as being directly linked to Russian-US relations.⁷⁵

Comments made by Putin just days prior to the launch of Russia's attack indicate that a key concern for Russia was the use of the Ukrainian territory by "third countries" to create threats against the Russian Federation itself.⁷⁶ Furthermore, in the months preceding the invasion, the US responded to the perceived threat of a Russian attack on Ukraine with the decision to move several thousand US troops to strengthen NATO's eastern flank and to increase US military assistance to Ukraine.⁷⁷

Though not perceived to be the sole trigger that instigated the Russian invasion, supporting factors, such as the US providing over 1 billion USD in security assistance to Ukraine and committing over 3 billion USD in training and equipment to help Ukraine preserve its territorial integrity, secure its borders and improve interoperability with NATO between 2021 and 2022, may have contributed to overall feelings of insecurity on the Russian side.⁷⁸ For Russia, against a backdrop of confrontation with the US, it has become increasingly evident that Ukraine needed to become a "Russia-friendly" space at any price.

RUSSIA OR UKRAINE? - MENA COUNTRIES' POSITIONALITIES

As explored briefly before, the perception of a larger conflict that also involves countries that are not actively a warring party to the conflict is very dominant amongst almost all surveyed countries. When asked which of the warring countries are supported by who in and outside of the region, the clear tendency is that the US supports Ukraine and China supports Russia. A spectacular 97% of Iranians surveyed see the US as the main backer for Ukraine. Generally, the support for Ukraine is perceived mostly from European/Western countries and the support for Russia from Iran and to a considerable extent also from Türkiye. It is noteworthy that in given responses options, only Western European countries and the EU as a whole were presented to the surveyed populations. **(Graph 6 and Graph 7 next page)**

74 Eve Conant (2023): Russia and Ukraine: the tangled history that connects – and divides – them, National Geographic, Retrieved at: <https://www.nationalgeographic.com/history/article/russia-and-ukraine-the-tangled-history-that-connects-and-divides-them>

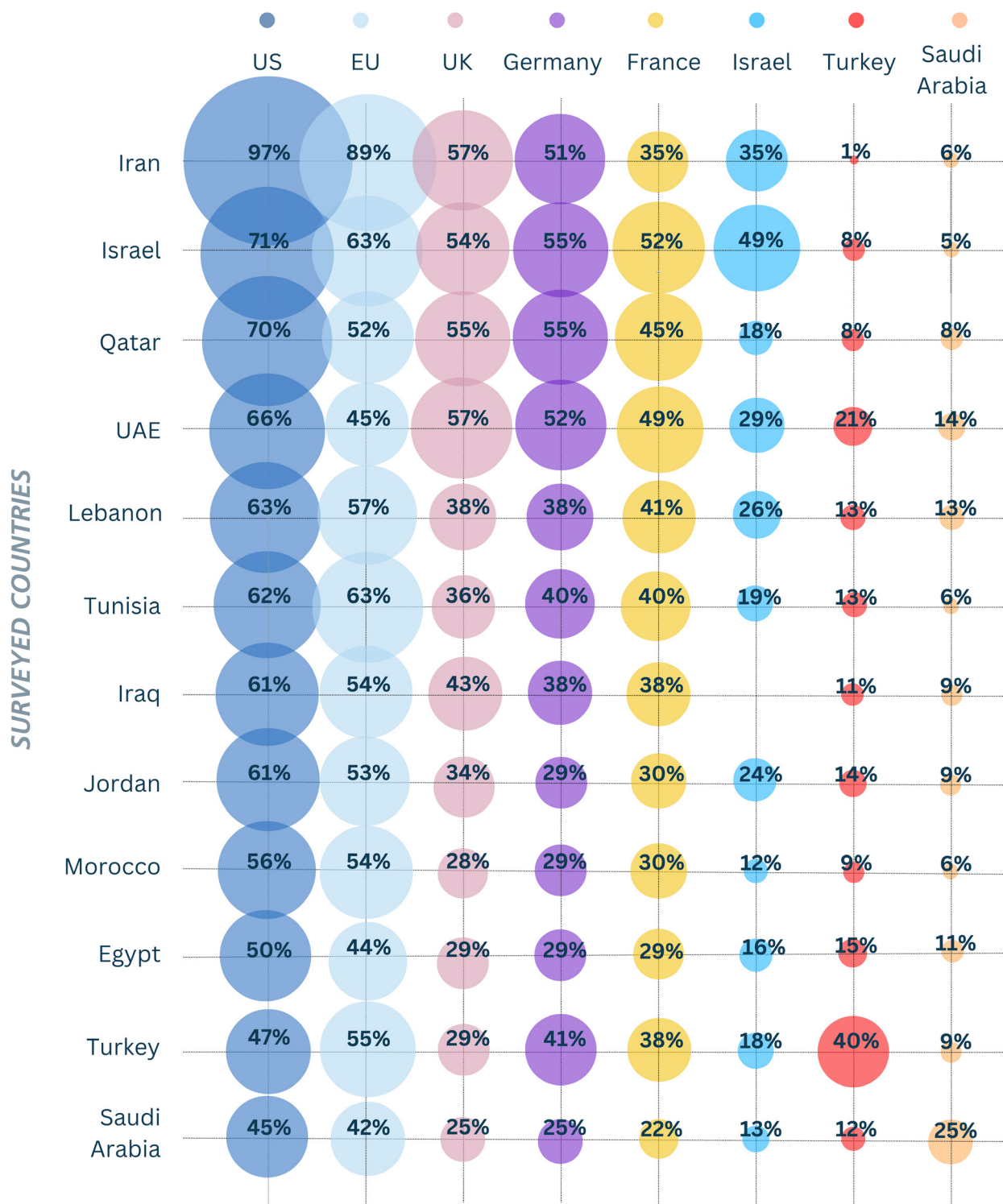
75 William Roberts (2022): Ukraine war: what would a 'rupture' in US-Russia relations mean?, Al Jazeera, Retrieved at: <https://www.aljazeera.com/news/2022/3/28/ukraine-war-what-would-a-rupture-in-us-russia-relations-mean>

76 Jonathan Masters (2022): Why NATO Has Become a Flashpoint With Russia in Ukraine, Retrieved at: <https://www.cfr.org/backgrounder/why-nato-has-become-flash-point-russia-ukraine>

77 Shane Harris, Karen DeYoung, Isabelle Khurshudyan, Ashley Parker and Liz Sly (2022): Road to war: U.S. struggled to convince allies, and Zelensky, of risk of invasion, The Washington Post, Retrieved at: <https://www.washingtonpost.com/national-security/interactive/2022/ukraine-road-to-war/>

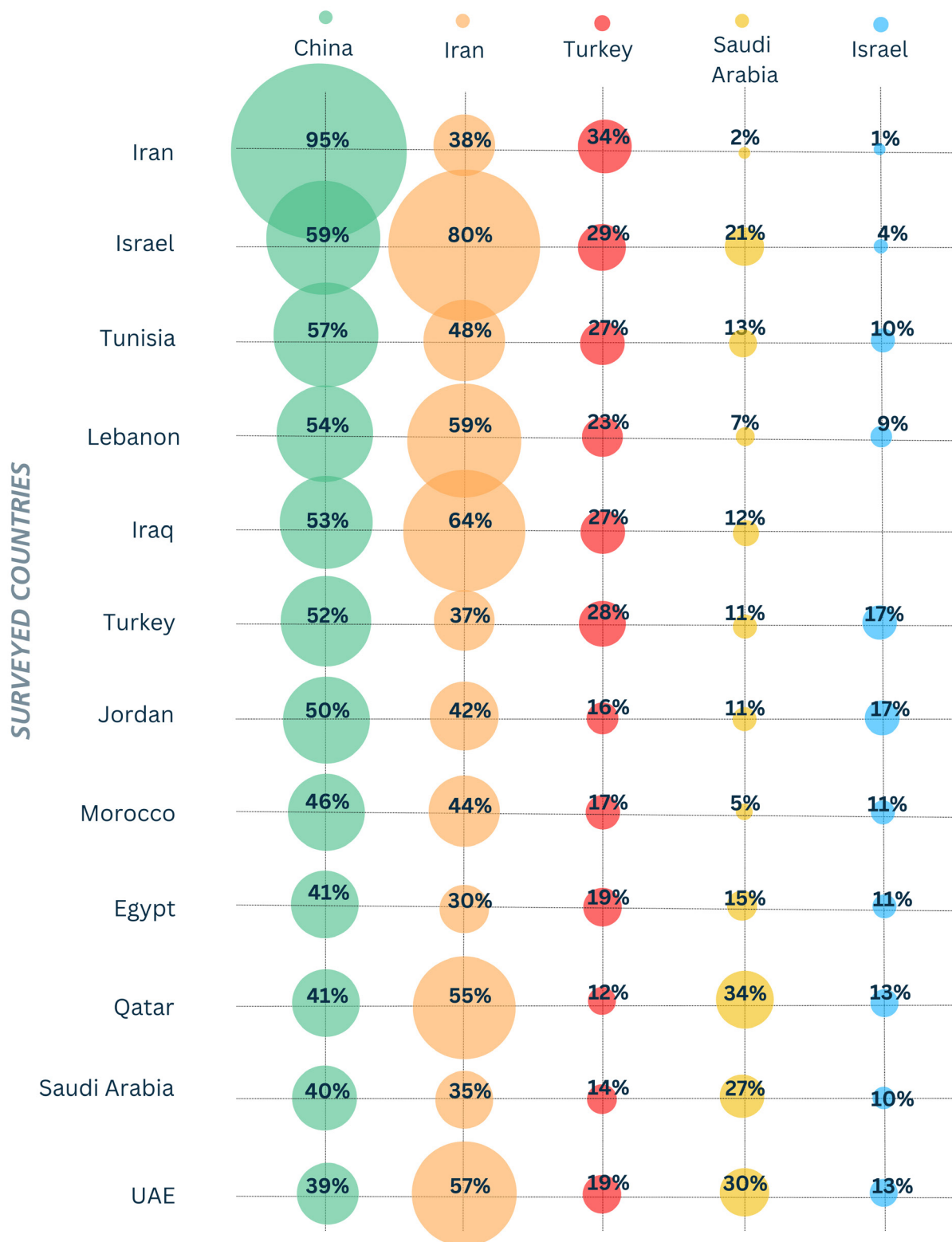
78 Bureau of Political-Military Affairs (2023): U.S. Security Cooperation with Ukraine, US Department of State, Retrieved at: <https://www.state.gov/u-s-security-cooperation-with-ukraine/#:~:text=In%20June%202020%2C%20the%20U.S.,separately%20fund%20an%20additional%20two.>

WHICH OF THESE COUNTRIES GENERALLY SUPPORTS UKRAINE?*



*Respondents could give multiple answers to this question.

WHICH OF THESE COUNTRIES GENERALLY SUPPORTS RUSSIA?*



*Respondents could give multiple answers to this question.

In addition to Iranians' strong perception of the US support for Ukraine, they are also an outlier in their perception of Chinese support for Russia with a remarkable 95% of respondents believing this. One noteworthy observation for Türkiye is that it is perceived by countries surveyed in the region as generally supporting Russia more than Ukraine, however in their self-perception, Turkish respondents assume more support for Ukraine than for Russia (40% to 28% respectively). This ambiguity might stem from the fact that Türkiye sees itself aligned closely with the Western narrative while, in reality, it is officially balancing close ties with both Russia and Ukraine, not implementing the same sanctions on Russia as the West and selling Bayraktar drones to Ukraine (explored in the next chapter as well as in the Türkiye country chapter).

II. PERCEPTIONS ON THE SOCIO-ECONOMIC EFFECTS OF THE WAR

Western Sanctions since 2014

Following the invasion of Ukraine in 2014, several countries imposed economic sanctions on Russia. These sanctions included asset freezes, travel bans, and restrictions on financial transactions targeting individuals, entities and sectors involved in the annexation of Crimea and destabilization of Eastern Ukraine. The measures were implemented by the European Union, United States, Canada, United Kingdom and the G7 countries collectively.

In the context of Russia's invasion of Ukraine in 2022 the US, in collaboration with its allies, has taken measures to ensure that both the Russian Federation and the Lukashenka regime in Belarus face significant economic and diplomatic consequences for their aggression against Ukraine. These actions, as outlined by the US Department of State, include imposing strong sanctions on Russia's major financial institutions and sovereign wealth fund, hindering Russia's ability to obtain external funding for its war efforts, prohibiting the importation of crucial technologies to Russia, and curbing the financial networks and assets of influential individuals in Russia and Belarus, including President Putin and members of his security council.⁷⁹ The EU and Canada have also been imposing sanctions since 2014 as response to the annexation of Crimea and Russia's non-compliance with the Minsk agreement; these were expanded from 2022 on.⁸⁰

The Council of the EU' stated that the aim of the economic sanctions is *"...to impose severe consequences on Russia for its actions and to effectively thwart Russian abilities to continue the aggression"*.⁸¹ These sanctions reportedly target people responsible for "supporting, financing or implementing actions which undermine the territorial integrity, sovereignty and independence of Ukraine, or who benefit from these actions".⁸²

As of June 2023, under consideration of individual sanctions

imposed since 2014, the EU has sanctioned 1,473 individuals and 207 entities, including Russia's President, Vladimir Putin,⁸³ Russia's Minister for Foreign Affairs, Sergey Lavrov and former President of Ukraine, Viktor Yanukovich.⁸⁴ Sanctions extend to oligarchs linked to the Kremlin, members of the Russian State Duma (the lower house of parliament) and members of the National Security Council.⁸⁵ Most recently, the EU has also extended sanctions against Belarus, in response to its involvement in the invasion of Ukraine, as well as Iran, in relation to Russian use of Iranian drones in the Russia-Ukraine War.⁸⁶

PERCEPTION OF SANCTIONS IN THE MENA REGION

To better understand perceptions on the Russia-Ukraine War, and ultimately, what the war means for the region, the survey asked questions aimed at exploring views on sanctions and their morality and efficacy. Views on sanctions were divided across the sample, in terms of their effectiveness, morality and whether Russia should face them. **(Graph 8 next page)**

79 U.S. Department of State (2023): How the United States is Holding Russia and Belarus to Account, Retrieved at: <https://www.state.gov/holding-russia-and-bearus-to-account/>

80 Council of the European Union (2023): EU sanctions against Russia explained, Retrieved at: <https://www.consilium.europa.eu/en/policies/sanctions/restrictive-measures-against-russia-over-ukraine/sanctions-against-russia-explained/>

81 Ibid.

82 Ibid.

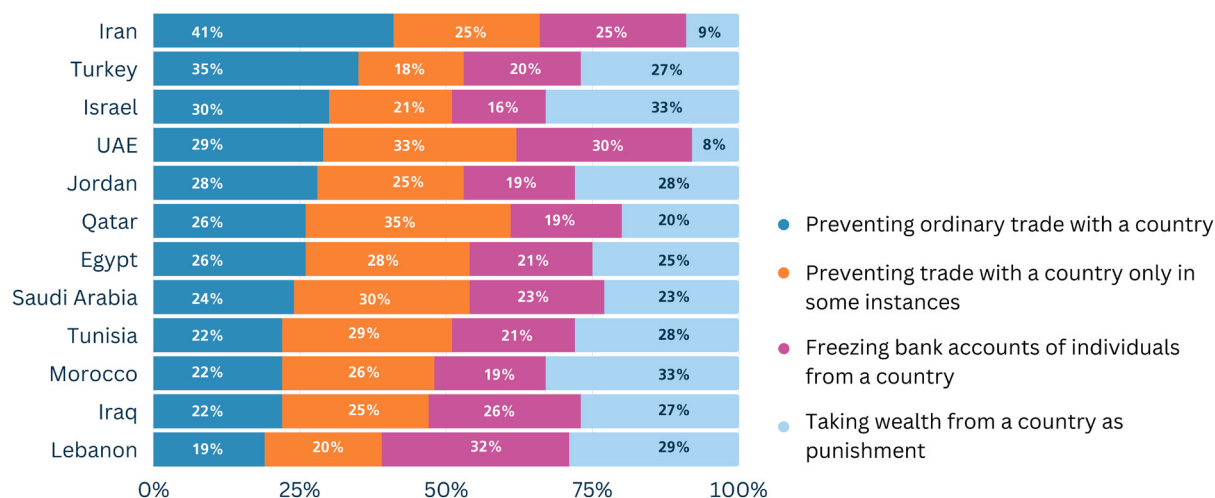
83 In addition to sanctions by Western states, the International Criminal Court (ICC) has issued an arrest warrant for Vladimir Putin on 17 March 2023. Cf. International Criminal Court (2023) Situation in Ukraine: ICC judges issue arrest warrants against Vladimir Vladimirovich Putin and Maria Alekseyevna Lvova-Belova, Press Release, Retrieved at: <https://www.icc-cpi.int/news/situation-ukraine-icc-judges-issue-arrest-warrants-against-vladimir-vladimirovich-putin-and>

84 Ibid.

85 Ibid.

86 Omer Tugrul Cam (2023): EU to impose new sanctions on Belarus, Iran for 'helping' Russia in war on Ukraine: Spokesman, Anadolu Agency, Retrieved at: <https://www.aa.com.tr/en/politics/eu-to-impose-new-sanctions-on-belarus-iran-for-helping-russia-in-war-on-ukraine-spokesman/2786297>

WHAT DO YOU THINK ABOUT FIRST WHEN IT COMES TO 'ECONOMIC SANCTIONS'?



Graph 8

This table broadly lays out how respondents define sanctions, based on responses given to them. In Iran as a country facing direct international sanctions, the high percentage (41%) of respondents saying that preventing ordinary trade is not surprising. For Qatari respondents, sanctions are most strongly defined as preventing trade only in some instances at 35% which could be related to its natural gas dependent foreign trade relations. Not surprising is the case for Lebanese respondents who in plurality focused on freezing bank accounts of individuals at 32%; with a dysfunctional banking system and many middle class citizens having lost access to their bank accounts in recent years, that is understood as a strongly punitive measure. However, with some exceptions (e.g. Israel, Iran), there is no clear measure that is ultimately seen as the definition of economic sanctions; in every other country, responses were very evenly distributed.

After providing respondents with some background on sanctions, the survey asked for their thoughts on the issue more broadly.

VIEWS ON SANCTIONS WERE DIVIDED

Economic sanctions are a form of punitive measure imposed by one country or a group of countries on another, typically for political reasons or to address concerns about human rights violations, security threats, or unfair trade practices. These sanctions involve restrictions on trade, financial transactions, investments, or other economic activities between the sanctioning countries and the target nation. The aim is to exert pressure and induce policy change or behavior modification in the targeted country.

As the Russia-Ukraine War progresses through a second year, the US has focused on the Middle East more strategically as it attempts to cut off Russia's economy. The US is well aware that Russia seeks to circumvent sanctions by shifting trade routes to the Middle East and has also increased its own trade with the region.⁸⁷ The US Treasury has resorted to warning that "individuals and institutions operating in permissive jurisdictions," including in the UAE and Türkiye, risk losing access to G7 markets for "doing business with sanctioned entities" or for failing to conduct due diligence against what they call illicit finance.⁸⁸

In order to combat sanctioned countries finding loopholes, the US imposes secondary sanctions, which essentially penalize parties that carry out commercial activities with sanctioned entities – even when these activities take place outside the US.⁸⁹ The US continues to call on its Middle Eastern allies to support its efforts to financially isolate Russia and its economic impact. To date, no Middle Eastern country has followed suit in issuing sanctions against Russia alongside the US, the EU and Canada.

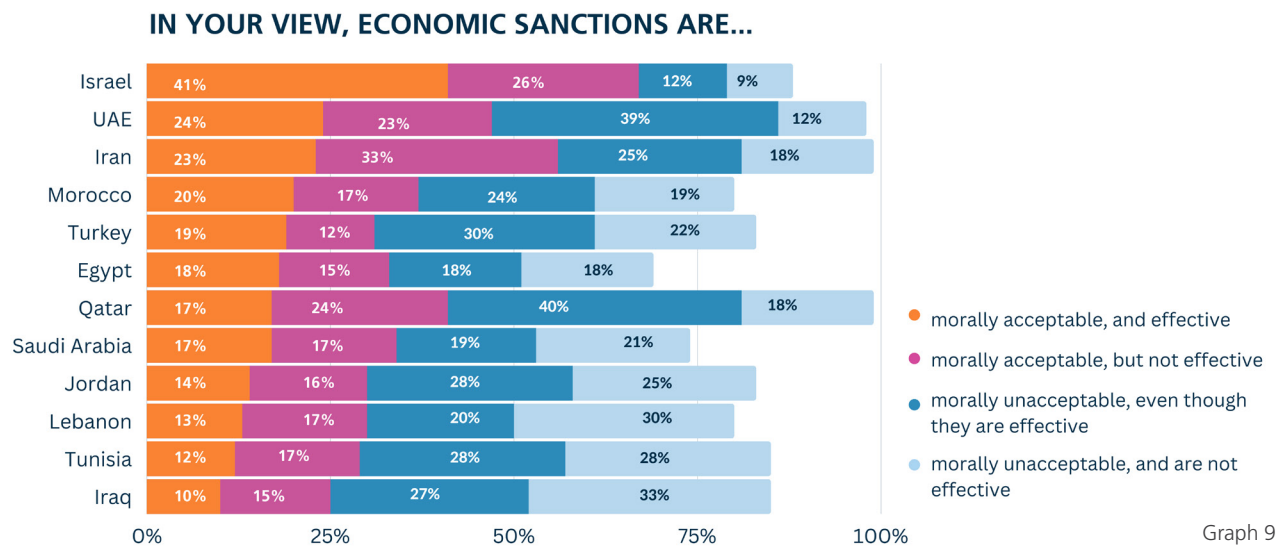
Many respondents in the region rejected the idea of economic sanctions in general as morally unacceptable, with the exception of Israel and Iran (67% and 56% respectively answered "morally acceptable," regardless of whether they considered them effective).

87 Nadeen Ebrahim and Mostafa Salem (2023): US turns up the heat on Middle East allies in bid to stop Russia's war machine, Meanwhile in the Middle East, CNN, Retrieved at: <https://edition.cnn.com/2023/02/03/middleeast/us-sanctions-russia-middle-east-mime-intl/index.html>

88 Daphne Psadedakis and Humeyra Pamuk (2023): Exclusive: Top U.S. Treasury official to warn UAE, Türkiye over sanctions evasion, Reuters, Retrieved at: <https://www.reuters.com/world/top-us-treasury-official-warn-mideast-countries-over-sanctions-evasion-2023-01-28/>

89 Daniel Flatly (2022): What Secondary Sanctions Mean, for Russia and World, Bloomberg, Retrieved at: <https://www.bloomberg.com/news/articles/2022-04-05/what-secondary-sanctions-mean-for-russia-and-world-quicktake>

tive or not). Respondents in Egypt were more divided on the moral acceptability of sanctions, irrespective of their effectiveness (33% deemed economic sanctions as morally acceptable whereas 36% did not). **(Graph 9)**



Rejection of sanctions in any form was particularly high among respondents from Tunisia (56%) and Iraq (60%). Except for Israel, Qatar, UAE, Morocco and Türkiye, where respondents generally viewed sanctions as effective, respondents were split over whether sanctions are effective or not. Only respondents in Lebanon and Tunisia considered economic sanctions as ineffective, regardless of their morality (47% and 45% respectively answered “not effective”). Across the sample, 20% or fewer respondents in each country said they view sanctions as both morally acceptable and effective—with the exception of Israel (41%), UAE (24%) and Iran (23%).

Participants were requested to indicate their stance on economic sanctions against Russia. 74% of Israeli respondents favored imposing sanctions on Russia (compared to 12% opposing). This contrasts with the Israeli government's position: although the state condemned the Russian invasion, it refrained from joining Western countries' sanctions regime.⁹⁰

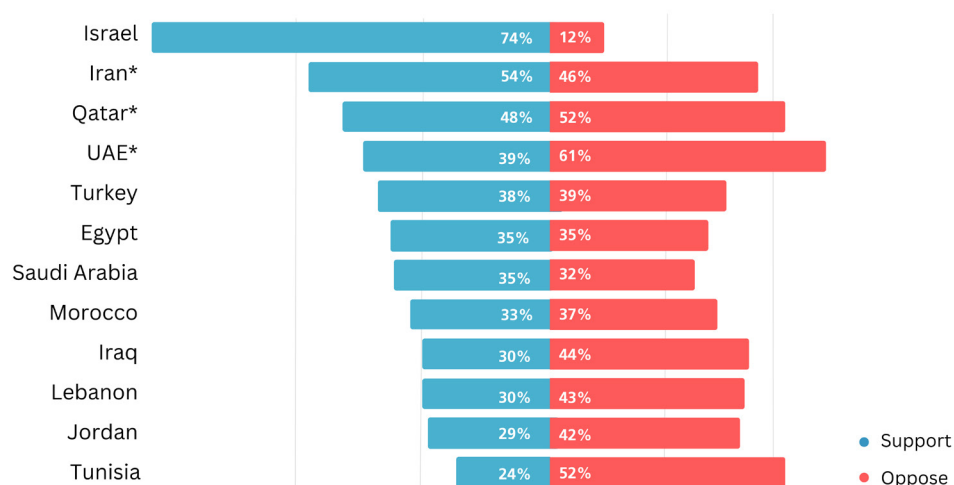
Respondents in the other countries in the region were fairly divided on this. Only in Qatar, UAE, Iraq, Lebanon, Jordan and Tunisia did more respondents opt against imposing economic sanctions against Russia than for. Iraq⁹¹ and Lebanon⁹² have witnessed direct or indirect sanctions in their recent history which have significantly affected their socio-economic situations. In Lebanon, sanctions, along with other factors, have contributed to a severe financial and banking crisis, hyperinflation and high unemployment rates since 2019. Similarly, Iraq faced comprehensive sanctions from 1990 to 2003, which impacted its economy, infrastructure, and social services, leading to challenges in importing essential goods and addressing the humanitarian needs of the population. Further, all countries receive some form of investment from, or have financial cooperation with Russia and an interest to maintain it, meaning direct implications if sanctions on their own economies and therefore potentially explaining the rejection of sanctions on Russia. **(Graph 10 next page)**

90 Keren Setton (2023): Israel's New Government Trying To Remain Neutral on Russia-Ukraine Conflict, The Media Line, Retrieved at: <https://themedialine.org/top-stories/israels-new-government-trying-to-remain-neutral-on-russia-ukraine-conflict/>

91 World Bank (2022): The World Bank in Iraq. Overview, Retrieved at: <https://www.worldbank.org/en/country/iraq>

92 Zeina Khodr (2020): Caesar Act: Fresh sanctions on Syria could worsen Lebanon economy, Al Jazeera, Retrieved at: <https://www.aljazeera.com/videos/2020/6/18/caesar-act-fresh-sanctions-on-syria-could-worsen-lebanon-economy>

DO YOU GENERALLY SUPPORT OR OPPOSE ECONOMIC SANCTIONS AGAINST RUSSIA?



*Values per country amount to 100% as the option "Not sure" (blanked out in this graph) was not given to participants of these countries

Graph 10

In the UAE and Qatar, 61% and 52% respectively said that they "generally oppose" the use of economic sanctions against Russia. Business between the UAE and Russia has been impacted by the war in Ukraine.⁹³ In February 2023, MTS Bank (a Russian bank operating in the UAE) was sanctioned by the US, amid concerns that Russia's growing economic ties to the Middle East are helping it evade western sanctions.⁹⁴ The bank, which has branches in Moscow and Abu Dhabi, was included in a new list of sanctions rolled out by the US against more than two hundred individuals and entities across Europe, Asia and the Middle East, and is accused of aiding Russia's war effort.⁹⁵

Non-oil trade between the UAE and Russia grew by a spectacular 57% in the first nine months of 2022.⁹⁶ Emirati Trade Minister Thani bin Ahmed al-Zeyoudi pledged to "push trade to even greater heights" in a December 2022 Tweet.⁹⁷ Additionally, wealthy Russians were the top buyers of real estate in Dubai in 2022.⁹⁸

FELT IMPACTS ON LIVELIHOODS AT THE HOME COUNTRY LEVEL, RESOURCE SCARCITY AND ACCESS

As the war in Ukraine continues, determining its impact on the global economy is key, but the data changes day by day. The global economy, having suffered the shock of the global financial crisis of 2008, has been teetering since then with a galloping trend towards "slowbalization"—characterized by a slowing of global trade⁹⁹—and the dangers of global recession with detrimental repercussions on fragile economies. The threat of recession is compounded by years of lockdowns and measures to counter the spread of the coronavirus pandemic, and survey responses from across the MENA highlight how serious concerns around the economic impacts of the Russia-Ukraine War now are for people living in the region.

The expanding Western sanctions against Russia on one hand, conflict with the global need for wheat from both Russia and Ukraine. While Western sanctions have not explicitly targeted Russia's agricultural exports, Moscow claims that restrictions on its

93 Sean Mathews (2023): Sanctions on Russian bank raise questions about 'sanctions-proofing' in Gulf, Middle East Eye, Retrieved at: <https://www.middleeasteye.net/news/sanctions-russian-bank-raise-questions-sanctions-proofing-gulf>

94 Ibid.

95 Ibid.

96 Thani Al Zeyoudi (2023): Retrieved at: <https://twitter.com/ThaniAlZeyoudi/status/1607653278858330112?s=20>

97 Ibid.

98 Yousef Saba (2022): Russians are Dubai's top non-resident property buyers in Q3: report, Zawya, Retrieved at: <https://www.zawya.com/en/business/real-estate/russians-are-dubais-top-non-resident-property-buyers-in-q3-report-vetsg12v>

99 Slowbalization is a term used to describe the trend towards a slower pace of globalization, as well as a more fragmented and localized economy.

The Economist (2023): Globalization, already slowing, is suffering a new assault, January 12th 2023, Retrieved at: <https://www.economist.com/briefing/2023/01/12/globalisation-already-slowing-is-suffering-a-new-assault>

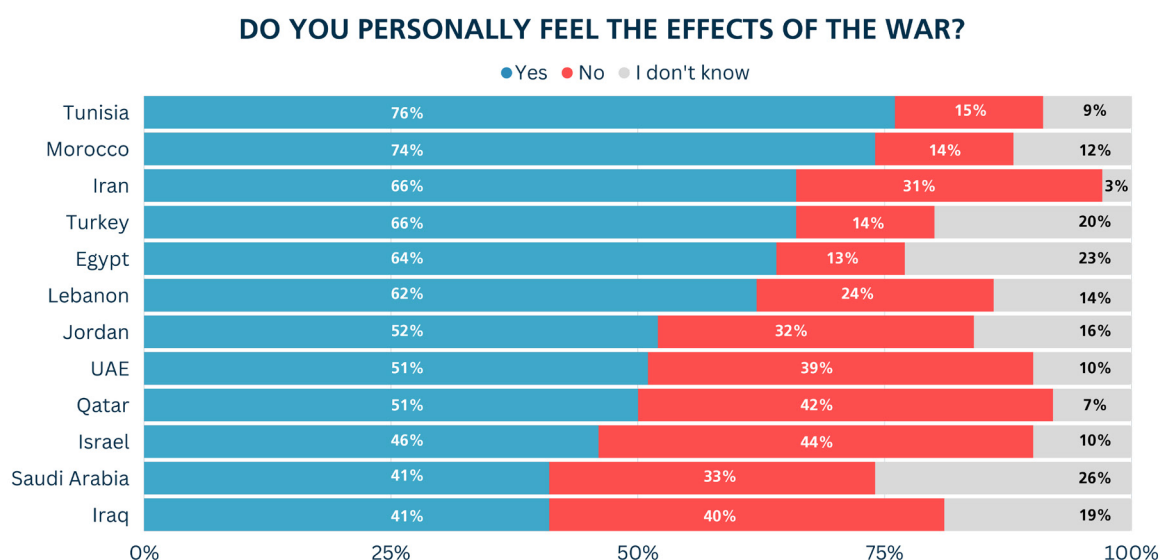
payment, logistics and insurance industries are hindering its ability to export grains and fertilizers.¹⁰⁰ Additionally, Ukraine's grain exports have been impacted by a smaller harvest amid logistical difficulties resulting from Russia's invasion. These factors have contributed to a global food crisis and soaring food prices and shortages in 2022, particularly in fragile economies (**Graph 11 below**).

The majority of respondents said they personally felt the effects of the war between Russia and Ukraine in their own country.

The extent to which people acknowledged negative consequences of the Russia-Ukraine War varied across the different countries in the region. Tunisia and Lebanon had the highest percentages of respondents indicating that their country was negatively affected by the conflict, with 75% and 71% respectively. Morocco followed with 68%, Jordan with 62% and Türkiye with 58%. Among Saudi respondents, 31% responded with "I don't know" while 18% said they thought the war had a positive impact on their country. In contrast, 61% of Qataris and 57% of Emiratis said that the conflict neither positively or negatively affected their country. Almost half of Iranian respondents said they thought the war had a negative impact, while a little less than half said that it had neither a positive or negative impact. (**Graph 14 next page**)

Increased cost of living was among the biggest overall concerns for respondents in most of the countries surveyed, including Tunisia (36%), Morocco (32%), Jordan (31%), Egypt (24%) Saudi Arabia (20%) and UAE (19%). In all countries except Lebanon, Tunisia and UAE, respondents mainly linked higher grocery prices directly to the war. In these three countries, higher energy prices were a more broadly felt day-to-day consequence while higher grocery prices and higher prices for gas were also major concerns for respondents. In Lebanon, a remarkable 30% more respondents pegged energy prices as a day-to-day impact of the war than higher grocery prices (**Graph 13 next page**) (**Graph12 next page**).

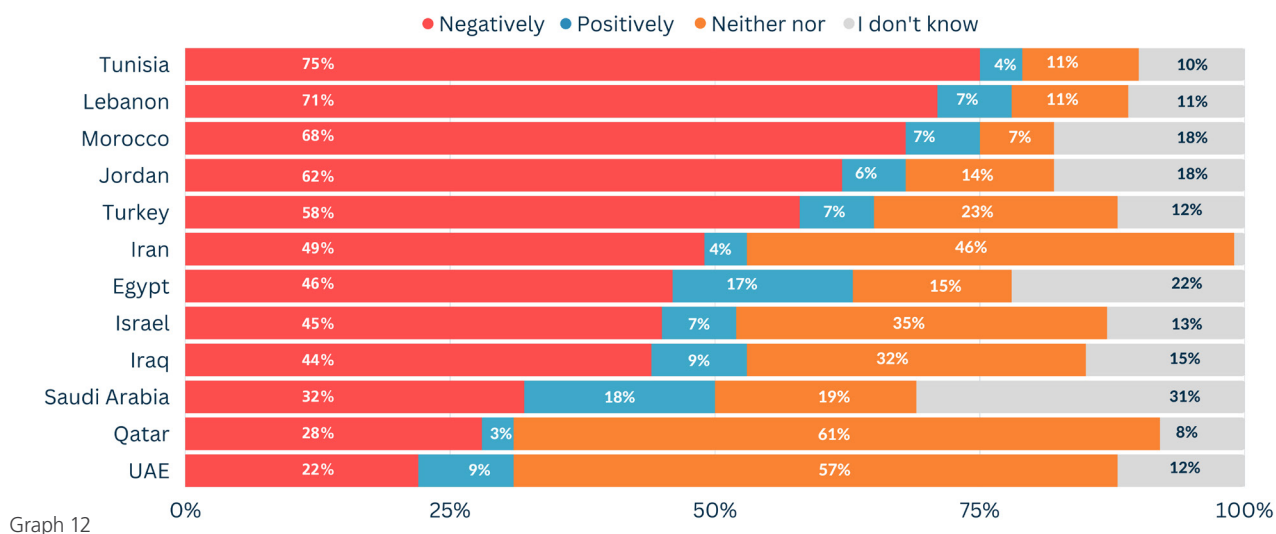
The second most indicated concern emphasized the moral and humanitarian catastrophe of war: "innocent people being killed and injured in Ukraine." In Israel 31% of respondents said this was their biggest concern, 25% in Iraq, 24% in Türkiye, 23% in Lebanon and 18% in Qatar. Iran was the only country where respondents mentioned something else as their biggest concern, citing their fear of the war spreading to other countries (20%) (**Graph 14 next page**).



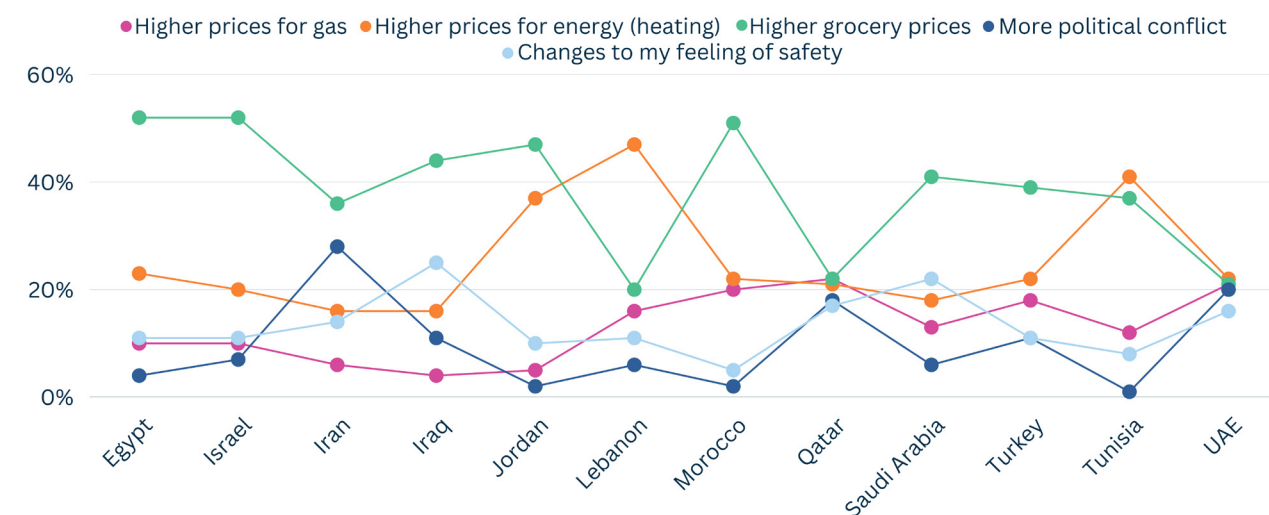
Graph 8

100 Reuters (2023): Russia says sanctions are a barrier to Black Sea grain deal renewal Retrieved at: <https://www.reuters.com/article/ukraine-crisis-grain-deal-idUSL8N34T3PC>

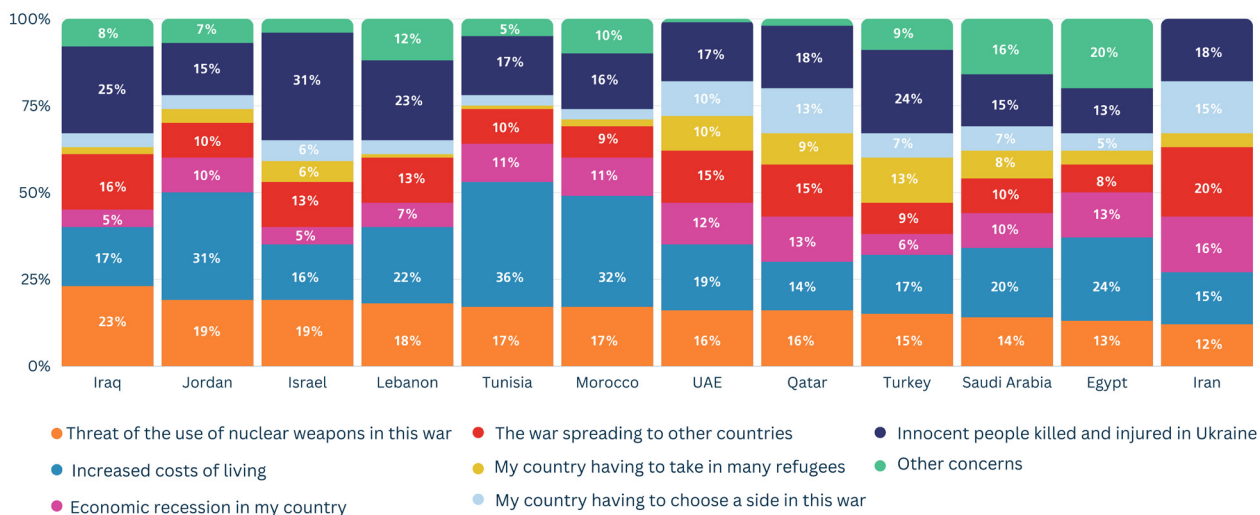
IS YOUR COUNTRY MORE POSITIVELY OR NEGATIVELY AFFECTED BY THE WAR?



WHAT EFFECTS OF THE WAR DO YOU EXPERIENCE IN DAY TO DAY LIFE IN YOUR COUNTRY?



WHICH IS YOUR BIGGEST CONCERN ABOUT THE WAR IN UKRAINE?



IMPACTS ON LIVELIHOODS IN THE COUNTRIES SURVEYED

The survey data suggests a feeling of persistent worry and general uncertainty despite an extension of the Black Sea Grain Initiative agreement brokered by Türkiye and the UN,¹⁰¹ perhaps because food security is just one of many concerns. As mentioned above and **visible in Graph 13 and 14 (page 25)**, economic recession and insecurity around resources are worries respondents' connect with the conflict overall.

Higher grocery prices were ascribed to the Russia-Ukraine War, especially in Egypt, Iraq, Jordan, Morocco and Israel, as shown in the table above. The issues of grain and food resources, price hikes and declining power were more pronounced in countries outside of the three Gulf monarchies. However, the survey shows that the cost of living is increasing everywhere.

Although Morocco has made significant progress in improving agricultural practices, increasing technology use and promoting research and development, it still heavily relies on wheat imports from the US, Russia and the EU.¹⁰² Despite being an essential crop in Morocco, wheat production is limited by factors such as water scarcity and land availability. The country's wheat production for the 2021/2022 marketing year is estimated at 5.5 million metric tons, while its total consumption is estimated at 16.6 million metric tons, making it a net importer of wheat. In the survey, concern over increases in grocery prices may be a symptom of insecurity regarding wheat sufficiency.

Iraq is one of the biggest consumers of both wheat and rice in the Middle East, but wheat is the most commonly consumed grain. In the 2021/2022 marketing year, Iraq's wheat consumption is estimated at 6.4 million metric tons, while its rice consumption is estimated at 1.4 million metric tons. Wheat is a key component of the Iraqi diet. However, like Morocco, Iraq is not self-sufficient in either wheat or rice production and relies heavily on imports to meet domestic demand. Respondents in Iraq indicated serious anxiety about the negative impacts of the war on living costs, particularly on rising grocery prices.

Lebanon is also highly dependent on grain imports, with almost

80% of the wheat consumed there coming from Russia and Ukraine.¹⁰³ In 2020, despite a severe financial crisis, Lebanon still imported \$388 million worth of wheat, making it the country's sixth largest import.¹⁰⁴ Lebanese apprehension of a war-driven wheat and cereal supply crisis, as well as a shortage of agricultural seeds, has coincided with worsening of the Lebanese economic crisis linked to the bankruptcy of the state and private banks. This also comes at a time government subsidies on wheat and other basic products are being lifted, after having been increased, including on those considered non-essential at the beginning of the crisis. This is thought to have contributed to the waste of financial resources.¹⁰⁵

The majority of Turkish respondents, almost 58%, believed that the war has had a negative impact on their country, while only 7% felt there was a positive impact. By comparison, 18% of Saudi Arabian respondents and 17% of Egyptians thought there were positive repercussions of the war in their country, despite, in Egypt's case, being in a country that is highly dependent on Ukrainian and Soviet grain. 39% of Turkish respondents linked an increase in grocery prices to the war, on top of inflationary dynamics that were already present before the conflict. And 18% linked an increase in gas prices to the war, explaining why in Türkiye there is such a feeling of negative impact due to the conflict.

The Black Sea Grain Initiative faced complications in the beginning, however was extended in November 2022 for another 120 days. By February 2023, over 715 voyages had safely transported more than 20 million tons of grain and other food products from Ukrainian ports. In March 2023, Türkiye and the UN began negotiations to facilitate negotiations for a second extension of the agreement. Due to this initiative, there has been less pressure on the grain market.¹⁰⁶ Correspondingly, predictions for the worldwide grain harvest in 2022 saw only a small decrease compared to yields from 2021.¹⁰⁷ However, the agreement remains

103 In 2020, 80% of Lebanon's overall wheat consumption was provided by imports from Russia, and 16% by imports from Ukraine.

World Bank (2023): First Shipment of 33,000 tons of Wheat Helps Rebuild Lebanon's Stock and Ensure Access to Affordable Bread, Press Release, Retrieved at: <https://www.worldbank.org/en/news/press-release/2023/02/11/first-shipment-of-33-000-tons-of-wheat-helps-rebuild-lebanon-s-stock-and-ensure-access-to-affordable-bread> "Lebanon imports nearly 80 % of the wheat it consumes" respectively 80% from Russia and 16% from Ukraine (worldbank.org)

104 The Observatory of Economic Complexity (OEC): Wheat in Lebanon, Retrieved at: <https://oec.world/en/profile/bilateral-product/wheat/reporter/lbn>

105 Kareem Chehayeb (2022): Lebanese fearful as fuel and wheat shortage deepens, Al Jazeera, Retrieved at: <https://www.aljazeera.com/news/2022/3/8/lebanese-fearful-as-fuel-and-wheat-shortage-deepens>

106 United Nations Black Sea Grain Initiative Joint Coordination Centre (2022): Operational update, Retrieved at: <https://www.un.org/en/black-sea-grain-initiative/operational-update-17-november-2022>

107 Ines Eisele (2022): Five facts on grain and the war in Ukraine, DW, Retrieved at: <https://www.dw.com/en/five-facts-on-grain-and-the-war-in-ukraine/a-62601467>

101 The Black Sea Grain Initiative was signed by Ukraine, Russia, Türkiye and the United Nations in Istanbul in July 2022, to ensure safe transportation of grain and foodstuffs from Ukrainian ports. This agreement was initially valid for 120 days, and allowed for the export of 20-25 million tons of grain previously blocked in Ukraine. This facilitated the export of Russian grain and fertilizer, which had been restricted due to sanctions against Russia. The agreement established secure corridors in the Black Sea between Ukraine and the Bosphorus, with a control center in Istanbul headed by the United Nations and staffed by representatives from Russia, Ukraine and Türkiye to monitor grain exports.

102 Michael Tanchum (2021): The Fragile State of Food Security in the Maghreb: Implications of the 2021 Cereal Grains Crisis in Tunisia, Algeria, and Morocco, Middle East Institute (MEI), Retrieved at: <https://www.mei.edu/publications/fragile-state-food-security-maghreb-implication-2021-cereal-grains-crisis-tunisia>

short-term, so must be renewed every few months under changing conditions brought by the war.

In the meantime, the UAE and Saudi Arabia have made good use of the West's demand for cheaper oil and gas to redefine their ties with the US.¹⁰⁸

Following the 2008 financial crisis, most Gulf countries implemented food security strategies. Some, such as the UAE, even established a dedicated ministry for food security.¹⁰⁹ The recent increase in oil prices has given these countries an additional financial buffer, cushioning them somewhat from the socio-economic impacts of the war, compared with those felt in oil-importing countries like Egypt.

Egypt, which is already struggling with a significant economic crisis, has increased the number of beneficiaries of its cash transfer programs to support its citizens. However, countries in conflict, such as Syria, Libya and Yemen, or those facing economic collapse, like Lebanon, do not have the luxury of implementing fiscal solutions to address the impact of the war.

Oil producing countries from the MENA region have so far refused to increase their output levels, despite frequent demands by Western countries. Keeping supply lower than demand increases profits and sends a clear message to the world that these countries do not wish to bypass Russia. According to Director of the Beirut based Carnegie Middle East Center, Maha Yahya, these dynamics can be seen as paving the way toward a wider web of partnerships in a future Middle East which may experience less influence by the United States.¹¹⁰

Economies in countries in the region have been struggling for years due to poor resource management, corruption, social injustices, sectarian divides,¹¹¹ economic sanctions and generally bad governance. Fear of the impacts of an overall worsening econo-

mic situation on livelihoods may be felt more keenly, especially in cases like Iran, where fear of a spill-over of the conflict to other regions and a more regionally isolated position may mean respondents there are particularly mindful of economic decline and potential increase in violence.¹¹²

III. PERCEPTIONS OF GLOBAL SHIFTS AND THEIR MEANING FOR THE REGION

As briefly touched upon in previous sections, the survey data reveal regional perceptions about the scope of the Russia-Ukraine War and its global relevance (see section on "Part of a Larger Conflict"). Further survey questions sought to understand how respondents saw global shifts playing out, their views on regional and superpowers and threats they saw as heightened due to the war.

Russia's crucial role is apparent within the data, and historical anti-Americanism or anti-imperialism and ideas linked to that do seem to remain relevant to attitudes and perceptions of respondents throughout the region. This historical legacy is likely to color respondents' views on the broader meaning of the Russia-Ukraine War, in ways that particularly resonate with people in the Middle East region.

NUCLEAR AND OTHER PERCEIVED THREATS TO SECURITY

As the former Soviet Union dissolved, an agreement was reached eventually turning Russia into the sole remaining nuclear power, rather than dividing the nuclear arsenal among the former Soviet republics, including Ukraine, which had its stockpile scrapped or transferred to Russia in exchange for security guarantees and economic assistance.¹¹³

Consequently, despite the shared origin of the Russian and Ukrainian armed forces, only Russia now possesses nuclear armament.¹¹⁴ This situation has raised grave concerns around the world about the possibility of nuclear warfare, especially given the limited advances by Russian forces so far achieved through conventional warfare, that have prompted the Russian leader-

108 Eckart Woertz (2023): How the Ukraine War Has Disrupted the MENA Region, One Year On, Italian Institute for International Political Studies (ISPI), Retrieved at: <https://www.ispionline.it/en/publication/how-the-ukraine-war-has-disrupted-the-mena-region-one-year-on-117984>

109 In 2017, The UAE Government established a State Ministry for Food Security. One of the key goals was to make Emirates the top country in the Global Food Security Index by 2051.

Cf. Clare Heaney: Food for thought: the future of food security in the UAE, Al Tamimi and Co, Retrieved at: <https://www.tamimi.com/law-update-articles/food-for-thought-the-future-of-food-security-in-the-uae/>

110 Maha Yahya is Director of the Malcom H Kerr Carnegie Middle East Center where her works focuses on political violence, identity politics and social justice.

Maha Yahya (2022): The Arab World and the Ukraine conflict: The quest for nonalignment, Atlantic Council, Retrieved at: <https://www.atlanticcouncil.org/uncategorized/the-arab-world-and-the-ukraine-conflict-the-quest-for-nonalignment>

111 Alex Vatanka (2023): Iran's Regime Stokes Sectarian Tensions in Baluchistan Province, Foreign Policy, Retrieved at: <https://foreignpolicy.com/2023/01/30/iran-protests-baluchistan-sunni-shiite-sectarian-tensions/>

112 Mardo Soghom (2022): Iran's Economic Crisis Turning Into Economic Chaos. Iran International. Retrieved at: <https://www.iranintl.com/en/202212133199>

113 Arms Control Association (2022): Ukraine, Nuclear Weapons, and Security Assurances at a Glance, Fact Sheets and Briefs, Retrieved at: <https://www.armscontrol.org/factsheets/Ukraine-Nuclear-Weapons>

114 International Crisis Group (2022): Answering Four Hard Questions About Russia's War in Ukraine, Briefing No. 96, Europe and Central Asia (08 December 2022), Retrieved at: <https://www.crisisgroup.org/europe-central-asia/eastern-europe/ukraine/b96-answering-four-hard-questions-about-russias-war-ukraine>

hip to repeatedly threaten to make use of its nuclear arsenal.¹¹⁵

Since 24 February 2022, Europe has been actively highlighting increased perceived insecurity on its continent. This comes largely due to the real threat of weapons of mass destruction and the inability to assess how far the Russian political leadership will be willing to go to turn this war around. The close proximity is definitely a major factor in this regard. Further, different countries in Europe as well as the US have shown their vulnerability to hybrid and economic warfare.¹¹⁶ Moscow's involvement in the Syrian war has further complicated the situation in the years leading to the Russia-Ukraine War.¹¹⁷

Respondents in the Middle East were not left untouched by these dynamics. Concerns about the potential for use of nuclear weapons were prevalent among respondents in all countries, being the highest amongst Iraqi respondents with 23% giving this response, with only “innocent people dying in the conflict” getting a few more responses as a biggest concern. Iraq has had its own wars and conflicts and is still recovering, however, even respondents in countries such as Jordan that are mainly stable and far from eruptive conflict have expressed the concern for nuclear weapon use.

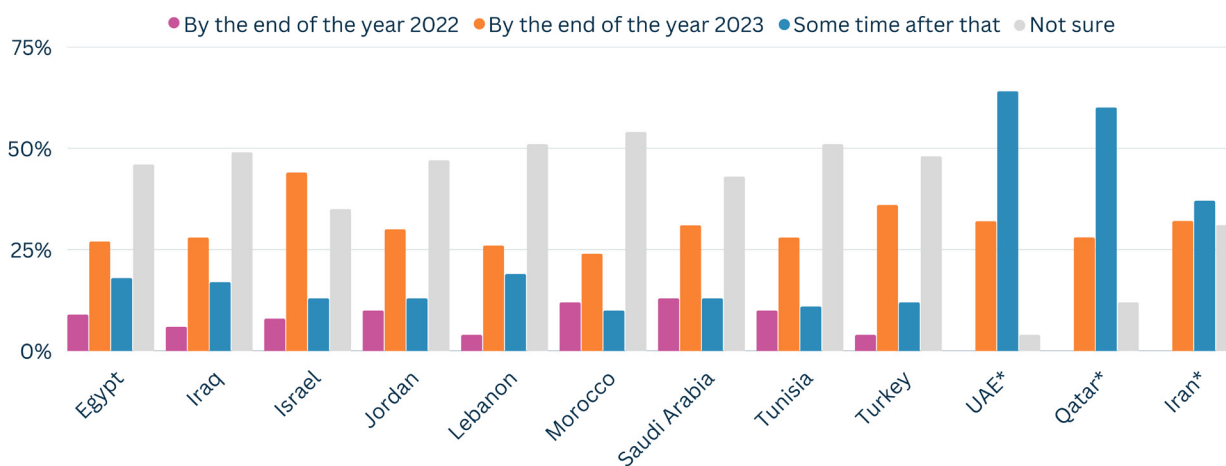
Survey respondents were generally less concerned about the current conflict spreading to other countries. While 16% in Iraq, 15% in Qatar and UAE shared this concern, it was relatively moderately represented among other samples – with the exception of Iran where it constituted the most common biggest concern at 20%. This provides telling insights into perceptions about potential conflict dynamics in the region, which are in part also shared by parties from other parts of the world.¹¹⁸

More respondents in Iraq (25%) and Saudi Arabia (22%) said they felt “changes to my feeling of safety” as a day-to-day consequence of the Russia-Ukraine War than any other state. **(Graph 14 - Page 25)**

Respondents generally felt they were exposed to multiple substantial challenges at once, affecting their livelihoods as well as their physical security, complicating clear assessments about which war effects and concerns would take precedence over others.

Large pluralities of respondents were uncertain about when the ongoing Russia-Ukraine War will come to an end. Only in Israel did more respondents indicate when they felt this was likely to happen - by the end of 2023 - than said they did not know. Large majorities in Qatar and UAE thought it likely to end at some unspecified point beyond the end of 2023. **(Graph 15)**

WHEN DO YOU THINK THE WAR IN UKRAINE WILL END?



Graph 15

115 International Crisis Group (2022): Answering Four Hard Questions About Russia's War in Ukraine, Briefing No. 96, Europe and Central Asia (08 December 2022), Retrieved at: <https://www.crisisgroup.org/europe-central-asia/eastern-europe/ukraine/b96-answering-four-hard-questions-about-russias-war-ukraine>

116 Raymond Millen (2022): Stability Challenges and Opportunities Regarding the Russo-Ukrainian War, George C. Marshall European Center for Security Studies, Retrieved at: <https://www.marshallcenter.org/en/publications/perspectives/stability-challenges-and-opportunities-regarding-russo-ukrainian-war-0>

117 Megan Stewart (2022): What can the Syrian civil war tell about the war in Ukraine? Middle East Institute, Retrieval at: <https://www.mei.edu/publications/what-can-syrian-civil-war-tell-us-about-war-ukraine>

118 For instance, leaked US intelligence reports suggest that a conflict spillover that would involve Iran has been considered one scenario by US intelligence services, as reported by: Ken Klippenstein, Murtaza Hussain (2023): Leaked Pentagon Document Shows How Ukraine Is Bleeding Into The Middle East, 13 April 2023, The Intercept. Retrieved at: <https://theintercept.com/2023/04/13/leaked-pentagon-document-ukraine-iran-war/>

POLITICAL SYSTEMS AS A FACTOR INFLUENCING PUBLIC OPINION

The role and influence of political leadership and rule are of substantial importance for the formation of public opinion in the Middle East.

In the majority of Middle Eastern countries, the population has limited influence on foreign policy matters, which is a common characteristic of long-standing authoritarianism in this region. However, this lack of impact on their countries' foreign policy does not necessarily imply a systematic disregard for events beyond their borders, and state elites and leaders also have to take public opinion into account about their foreign policy decisions.¹¹⁹ Therefore, although the formation of an active and critical public opinion on foreign policy and international relations faces numerous challenges, it is still important to identify deep-seated patterns or tendencies that shed light on the popularity of specific world views, as well as how individuals perceive crises, cataclysms, and various approaches to regional and international order normalization and institutionalization.

It should be noted that freedom of expression and space for the development of personal convictions, free from frustration and pressure, vary between countries, societies and even social groups in the surveyed countries. Ultimately, the region remains haunted by the failed hopes of the 2011 wave of democratization, known as the Arab Spring, and burdened by disappointment and demoralization.^{120 121}

Throughout some of the questions in the survey, a major observation has been the divergence between official government positions and respondents' answers. Particularly Iran and Israel stick out in this regard as highlighted previously and focused on in country focuses below.

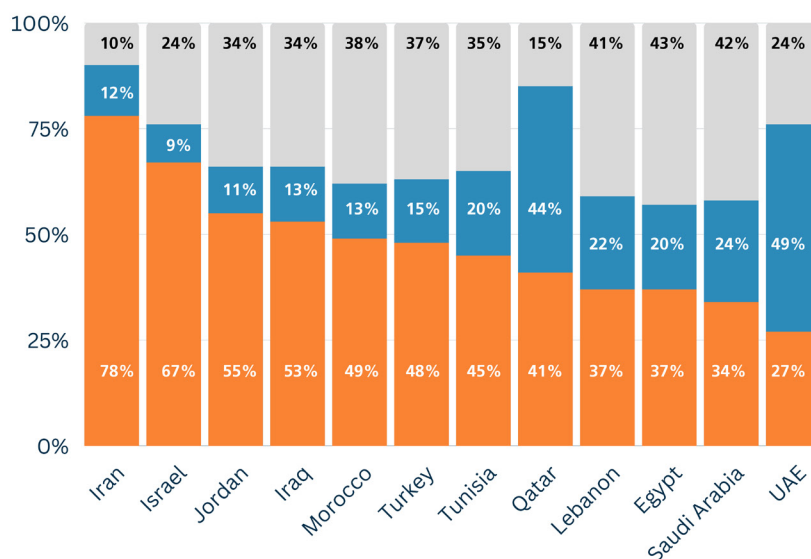
RUSSIA AND THE US IN THE MENA: WHO IS PERCEIVED AS THE LESSER EVIL?

Respondents broadly believed that Russia's involvement in the Middle East was more harmful than beneficial for the region. A majority of Iranian, Israeli, Jordanian and Iraqi respondents said they believed Russia's involvement in the region was harmful to people and countries. But respondents from the UAE and Qatar tended to view Russian involvement in the Middle East more positively, with 49% and 44% respectively saying Russian involvement was beneficial to people and countries in the region.

Based on this data, it is challenging to speak about the Middle East as a Russophile stronghold. It is also crucial to note the high rate of "I don't know" responses to this question: 43% in Egypt, 42% in Saudi Arabia and 41% in Lebanon. The complexity of historic ties, bilateral government relations and the real and perceived challenges that come with war is reflected in the ambiguity of responses with no clear regional position indicated by the data. **(Graph 16)**

RUSSIA'S INVOLVEMENT IN THE MIDDLE EAST IS GENERALLY...

- More harmful to the region
- More beneficial to the region
- Not sure



Graph 16

119 Raymond Hinnebusch and Anoushiravan Ehteshami (2014): *The Foreign Policy of Middle East States*, Lynne Rienner Publishers, pp. 29-32.

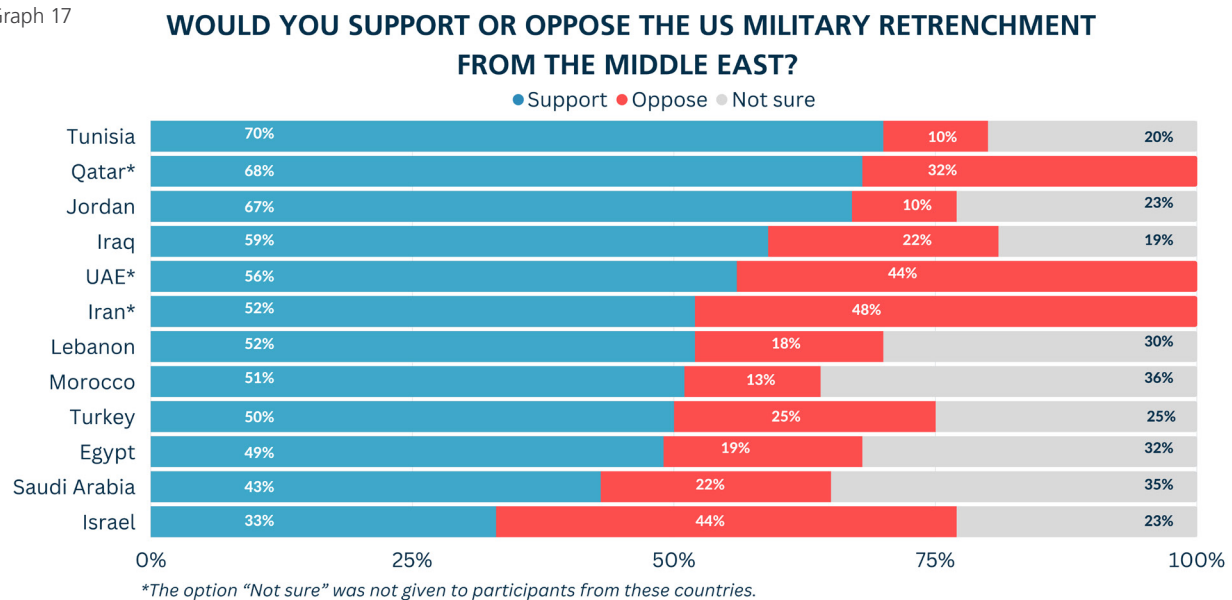
120 Camille Jablonski (2023): *Political Rights and Civil Liberties in the Middle East: Trends in Freedom House Data Since 2010*, The Washington Institute for Near East Policy, Retrieved at: <https://www.washingtoninstitute.org/policy-analysis/political-rights-and-civil-liberties-middle-east-trends-freedom-house-data-2010>

121 Freedom House (2023): *Freedom in the World 2023*, Retrieved at: https://freedomhouse.org/sites/default/files/2023-03/FIW_World_2023_DigitalPDF.pdf

The US was considered responsible for the war by the majority of responses as discussed previously. These noteworthy results are likely related to a long history of widespread negative views of the US.¹²² Controversy over US presence and activities in the region has prevailed in the region up to recent times, heightened by historic events such as the invasion of Iraq in 2003, continued US support to Israel, and perceived unreliability as a result of recent administrations' foreign policy in the region.^{123 124}

Majorities in eight out of twelve surveyed countries responded favorably to the idea of a potential US military withdrawal from the Middle East. This view was shared by half of respondents in Türkiye and pluralities in Egypt and Saudi Arabia. Only in Israel did more respondents say they would be against a US military withdrawal than in favor. **(Graph 17)**

Graph 17



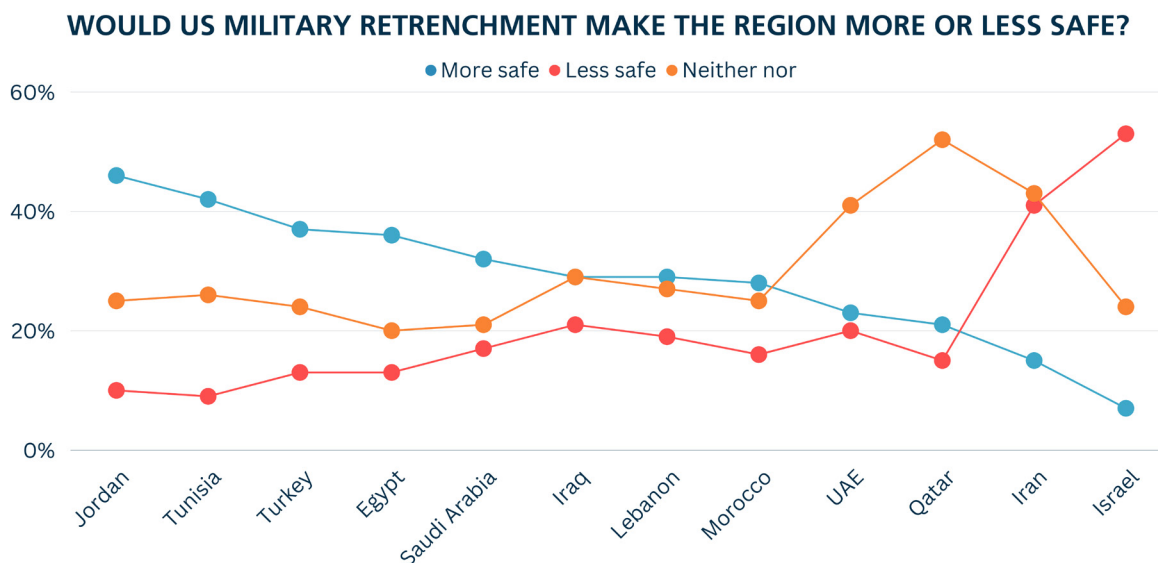
Interestingly, there was less support for US-retrenchment among respondents who saw a potential US military withdrawal as likely to increase regional safety with no majority and the largest pluralities in seven countries to agree with this view. Respondents in UAE, Qatar and Iran assumed no changes to regional security to happen with a complete withdrawal of US-troops, and a majority in Israel predicting more insecurity. The region is marked by generally more presence of domestic military in daily lives as well as the legacy of US military presence. Israel's isolated geopolitical role and relationship with the US may explain why respondents there felt retrenchment would lead to a security deterioration. **(Graph 18)**

122 Tom Rosentiel (2005): Arab and Muslim Perceptions of the United States, Pew Research Center. Retrieved at: <https://www.pewresearch.org/2005/11/10/arab-and-muslim-perceptions-of-the-united-states/>

123 Abdel Mahdi Abdallah (2003): Causes of Anti-Americanism in the Arab World: A Socio-Political Perspective, Middle East Review of International Affairs, Vol. 7, No. 4, (December 2003). Retrieved at: https://ciaotest.cc.columbia.edu/olj/meria/meria_dec03/meria03_aba01.pdf

124 Daniel L. Byman (2017): Is America a bad wingman in the Middle East? Brookings Institution. Retrieved at: <https://www.brookings.edu/blog/markaz/2017/11/13/is-america-a-bad-wingman-in-the-middle-east/>

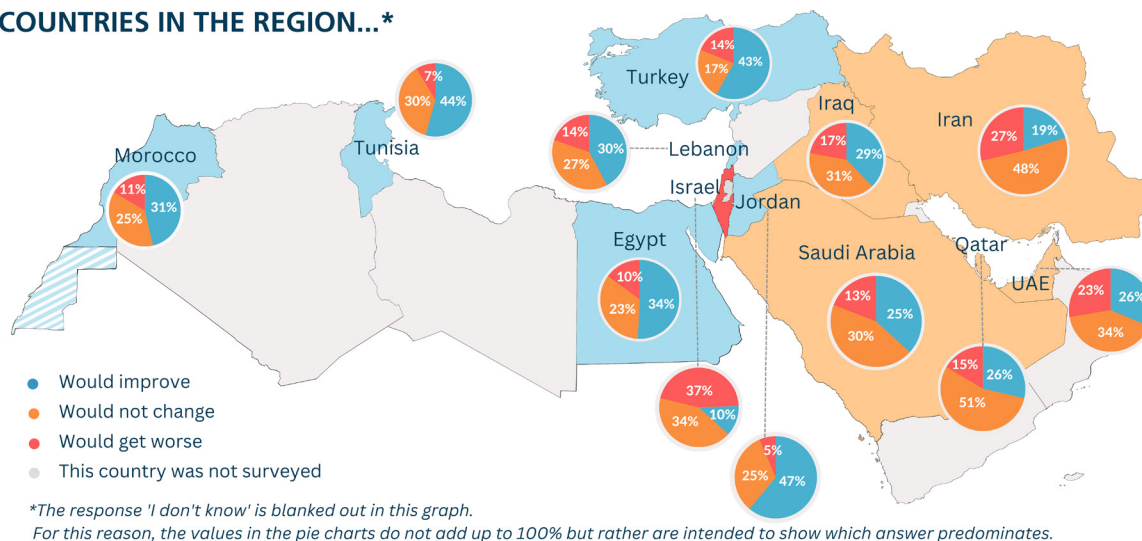
Graph 18



Respondents had somewhat divergent views regarding how relations between countries in the region would develop after a US military withdrawal. Substantial pluralities in six countries assumed that relations would improve, respondents in five countries assumed no change, and those in Israel anticipated deteriorating relations. Interestingly, it was the non-oil exporting countries who tended to think relationships between MENA countries would improve, potentially hoping to benefit from less US involvement in MENA affairs. **(Graph 19)**

Graph 19

AFTER US MILITARY RETRENCHMENT FROM THE MIDDLE EAST, RELATIONS BETWEEN COUNTRIES IN THE REGION...*



Endorsement, or lack thereof, for US military withdrawal from the region may also stem from recent experiences with the consequences of (partial) US disengagement from parts of the region, including withdrawal of forces from Syria,¹²⁵ missing support to partners in Iraq and the Gulf,¹²⁶ and prevalent confusion in the region over the direction and political will behind US policy overall.¹²⁷

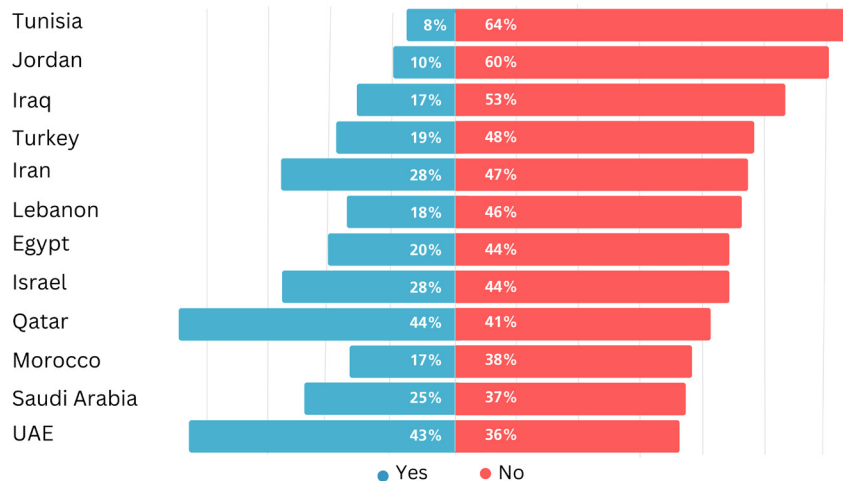
125 Max Hoffman (2019): Trump's Syria Shambles. President Trump's withdrawal from Syria has thrown the region into chaos, shattered American credibility, and uncovered deep problems with U.S. policy toward Türkiye. Center for American Progress. Retrieved at: <https://www.americanprogress.org/article/trumps-syria-shambles/>

126 Daniel L. Byman (2017): Is America a bad wingman in the Middle East? Brookings Institution. Retrieved at: <https://www.brookings.edu/blog/markaz/2017/11/13/is-america-a-bad-wingman-in-the-middle-east/>

127 Michael Young (2022): Disengaging From America. The countless discussions about a U.S. withdrawal from the Middle East should actually be formulated in reverse. Diwan. Middle East Insights from Carnegie. Retrieved at: <https://carnegie-mec.org/diwan/88647>

The survey investigated respondents' thoughts on the vacuum that may emerge in the event of US military retrenchment and which military might fill it. Responses to the concept of the EU stepping in militarily were negative throughout most countries, indicating general opposition to foreign (Western) military presence from all countries, even Israel. **(Graph 20)**

AFTER A US MILITARY RETRENCHMENT, WOULD YOU SUPPORT A LARGER EU MILITARY PRESENCE IN THE REGION?*

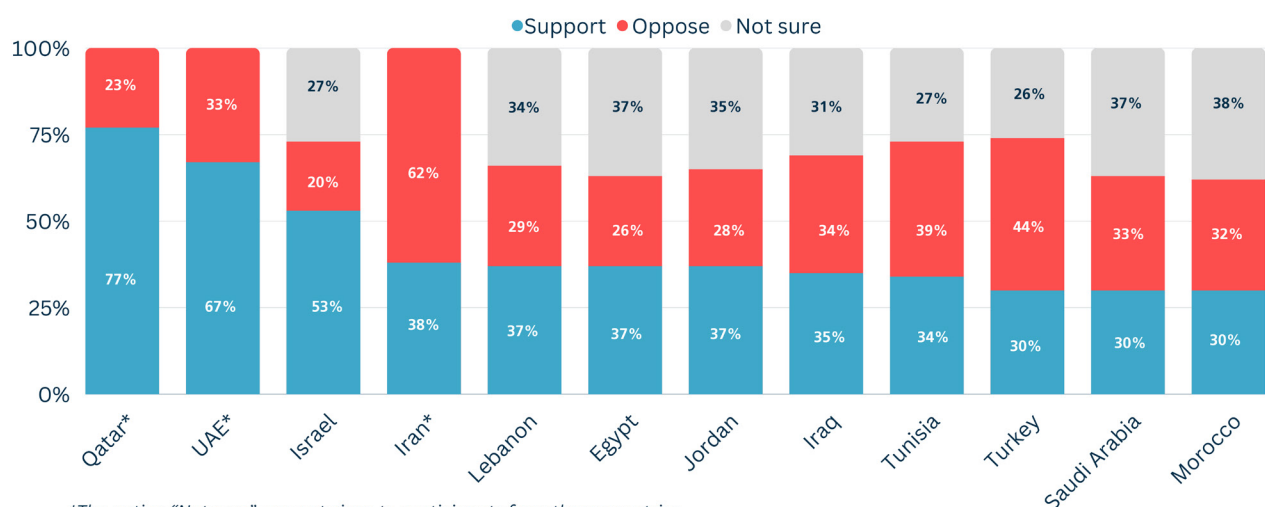


*I don't know responses were left out in this visualization

Graph 20

Only in the UAE and Qatar, there is more favor for than opposition against EU military presence¹²⁸ in lieu of the US military presence, with 43% and 44% of respondents respectively supporting larger EU military presence (versus 36% to 41% against). Both countries have seen an increase in trade relations with the EU with regards to gas and natural resources since the start of the war in 2022, therefore might be seeing a stronger EU engagement favorable for their economies. Also, majorities in both countries, as well as in Israel, support increased defense expenditures by EU countries; in all other countries except for Tunisia, Türkiye, Saudi Arabia and Morocco are also in pluralities in favor of higher military expenditures by EU countries, whereas in the named ones, as well as in Iran (where a large majority of 62% of respondents is against), there are either stronger pluralities against an increase, or uncertainty which still throughout almost all countries almost comes to one-third of the respondents.¹²⁹ Contrary, respondents in Tunisia, Jordan and Iraq majoritarily oppose stronger EU military presence in the region. **(Graph 21)**

DO YOU SUPPORT OR OPPOSE INCREASED DEFENSE EXPENDITURE BY EU COUNTRIES?



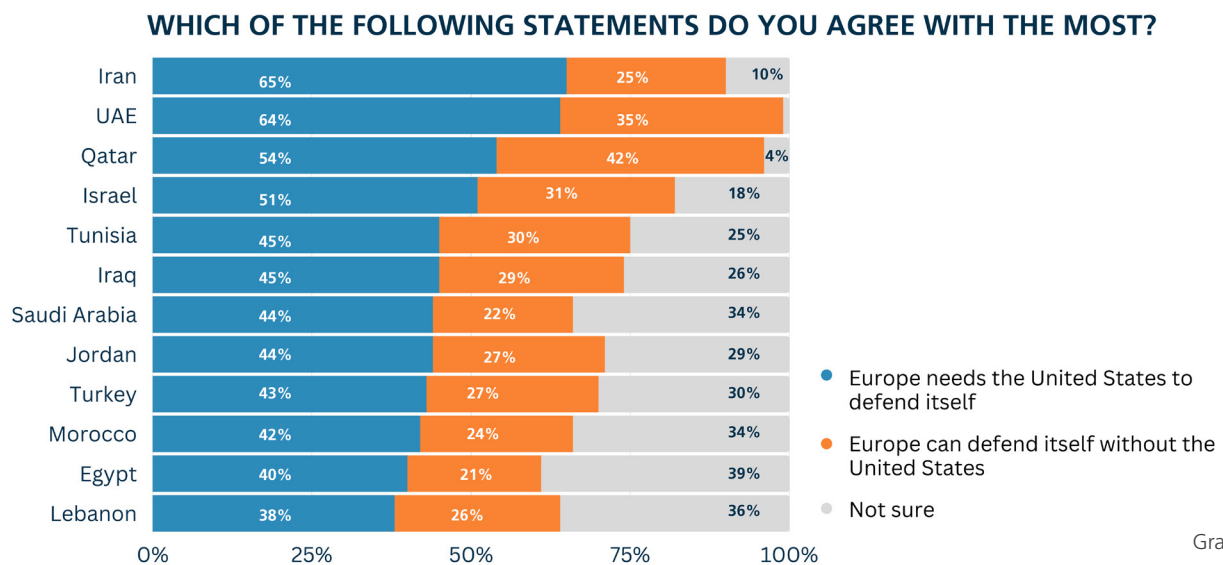
*The option "Not sure" was not given to participants from these countries.

Graph 21

128 The EU does not have its own military force. The establishment of the Common Security and Defense Policy (CSDP) in 1999 and the European Defense Agency (EDA) in 2004 are examples of initiatives aimed at strengthening defense cooperation among EU member states. The EU has also launched several military missions and operations under the framework of the CSDP, such as peacekeeping missions, crisis management operations, and anti-piracy activities. These missions are conducted with contributions from member states' armed forces, and the EU provides coordination and support.

129 It is crucial to note that in the UAE, Qatar and Iran, the "I don't know" answer was not provided.

It is noteworthy that there are pluralities of respondents in all countries, and majorities in Iran, the UAE, Qatar and Israel, believe that the EU needs the US to defend itself. This might explain why a stronger military presence beyond limiting external influence and presence in the region might also be largely opposed by citizens surveyed with this questionnaire. **(Graph 22)**



At the time of surveying, the Iran-Saudi rapprochement was not yet in sight and might have had impacted survey responses from those two countries as well as the broader region. Furthermore, that rapprochement has made more evident how important it is to consider China as a crucial foreign actor in the region and it would be interesting to further survey on the perceptions of China in the region in the future.

Russia's Military Presence in the Middle East – Parallels and Repercussions of Escalations

Besides spillover of the conflict and its effects, including the consequences of a potential nuclear escalation, there also are other substantial links between the conflict theater and the MENA region.

In this vein, Russian combat dynamics in Ukraine have had a strong connection to tactics and methods applied by the Russian armed forces in Syria, with potential repercussions on public perception in the entire MENA region. The concurrency of Russian military action in Syria and southeastern Ukraine since 2014 is a critical element. Russian security affairs and global affairs expert Mark Galeotti notes that Russian military action in both Syria and Ukraine are highly linked, and Russians are applying methods they previously tested out in Syria to Ukraine, from mercenaries to information operatives.

Common to both Russian military action in Syria and in Ukraine is the denial of the nature of that action to be a war, particularly in the case of Ukraine. Galeotti explains that this is due to the fact that it was not a general staff war, and that "...the initial strategy was cooked up by Putin and his inner circle, none of whom had any real military experience."¹³⁰ Therefore, Putin called the invasion a special military operation, not only for spin but perhaps because it was how he was thinking of it—more like a police action, according to Galeotti.¹³¹ It is worth noting that Russia refuses to recognize its action in Ukraine as a war.¹³²

Although Russia limited its Syrian engagement mainly to providing air support to Syrian armed forces, it still

¹³⁰ Mark Galeotti (2022): *Putin's Wars, From Chechnya to Ukraine*, Osprey, p. 346.

¹³¹ Ibid.

¹³² However, as Emma Beals highlights, "[w]hile some of Russia's tactics in Ukraine are the same as in Syria, the reaction to these has, in places, been markedly different." Moreover, Ukraine has "a functioning government that still controls a majority of its national territory."

Emma Beals (2022): *How the Lessons of the Syrian War May Safeguard Lives in Ukraine*, Carnegie Middle East Center, Retrieved at: <https://carnegie-mec.org/2022/04/27/how-lessons-of-syria-war-may-safeguard-lives-in-ukraine-pub-87005>

achieved a shift in the military situation to the Syrian regime's advantage.¹³³ Widely considered a strategic success, Russia's intervention not only provided it with a military foothold in the region for the next decade but also increased Russian self-confidence and influence, increasing military cooperation with Russia among other countries in the region.¹³⁴

From Russia's viewpoint its Syrian intervention also constituted an action against both perceived US unilateralism and US-led liberal international order, as well as alleged US and foreign support to democratic movements that had shaken the Arab world before.¹³⁵

In view of both, Russia has gained influence in the MENA due to its Syria engagement as well as economic and trade relations.

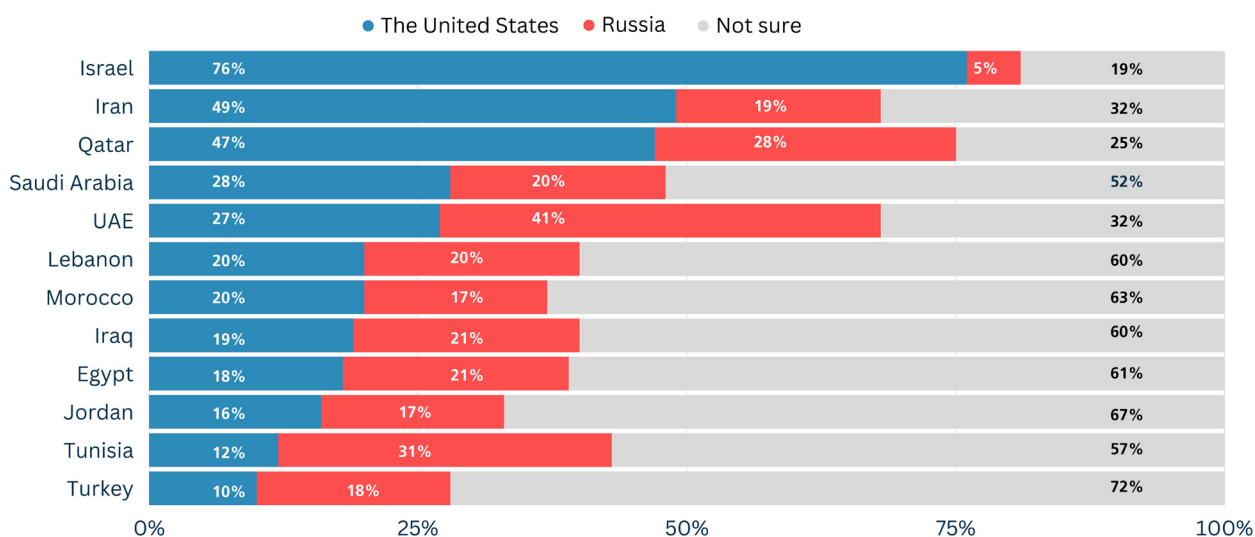
WHO IS MOST LIKELY TO "DO THE RIGHT THING"?

The survey results suggest some skepticism of the roles that Russia and the US play in the Middle East. In general, many respondents were uncertain whether they trusted Russia or the US to do the right thing in the Middle East, with majorities in Türkiye (72%), Jordan (67%) and Morocco (63%) saying they were "not sure". The US role was generally viewed slightly less favorably than Russia's in six countries, slightly more favorably in two countries and much more favorably in three countries. A substantial majority of Israeli respondents said they trusted the US more (76%), followed by pluralities in Iran (49%) and Qatar (47%). Only in the UAE did a plurality of respondents say they trusted Russia more to do the right thing in the region. Trust in the two was equal among Lebanese respondents at 20%.

The high ambiguity across and within state samples indicates the complexity of these countries' relationships with the US and Russia, taking into account economic, political and security considerations as discussed in previous parts. **(Graph 23)**

Graph 23

BETWEEN RUSSIA AND THE US, WHO DO YOU TRUST MORE IN THE MIDDLE EAST?



POLARITY UNPACKED: WHAT MENA COUNTRIES ARE EXPECTING THE GLOBAL ORDER TO BECOME

Pluralities of Iranian, Jordanian, Moroccan, Tunisian, Lebanese and Iraqi respondents believe that we live in a multipolar world where more than one (unipolar) or two (bipolar) country/-ies have impact on global dynamics. In the UAE, Israel, Saudi Arabia, Egypt and Türkiye, pluralities of respondents perceive the current order as unipolar, however believing that this is changing. These

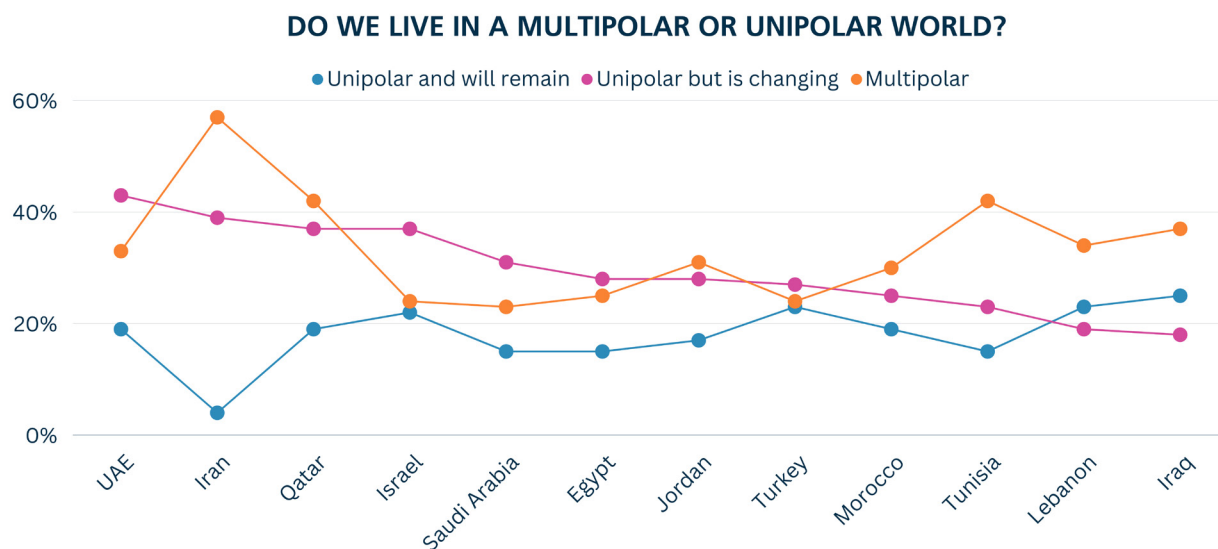
133 Isaac Chotiner (2022): Re-examining Putin's Military Interventions in the Middle East, The New Yorker. Retrieved at: <https://www.newyorker.com/news/q-and-a/reexamining-putins-military-interventions-in-the-middle-east>

134 Anna Borshchevskaya (2022): Russia's Strategic Success in Syria and the Future of Moscow's Middle East Policy, The Washington Institute for Near East Policy, Retrieved at: <https://www.washingtoninstitute.org/policy-analysis/russias-strategic-success-syria-and-future-moscows-middle-east-policy>

135 Ibid.

are specifically the surveyed countries in the region that have closer ties to the US (except Egypt historically), whereas the ones where respondents tend to believe we already live in a multipolar world are either historically anti-US (Iran) or fluctuating between US and Russian spheres (as discussed throughout the study and with more depth in the country chapters below). Therefore, based on the responses given in the context of this survey, a shift towards a changing global order and changing polarities after the majoritarily unipolar global order following the collapse of the Soviet Union is expected amongst historically closer US-allies. **(Graph 24)**

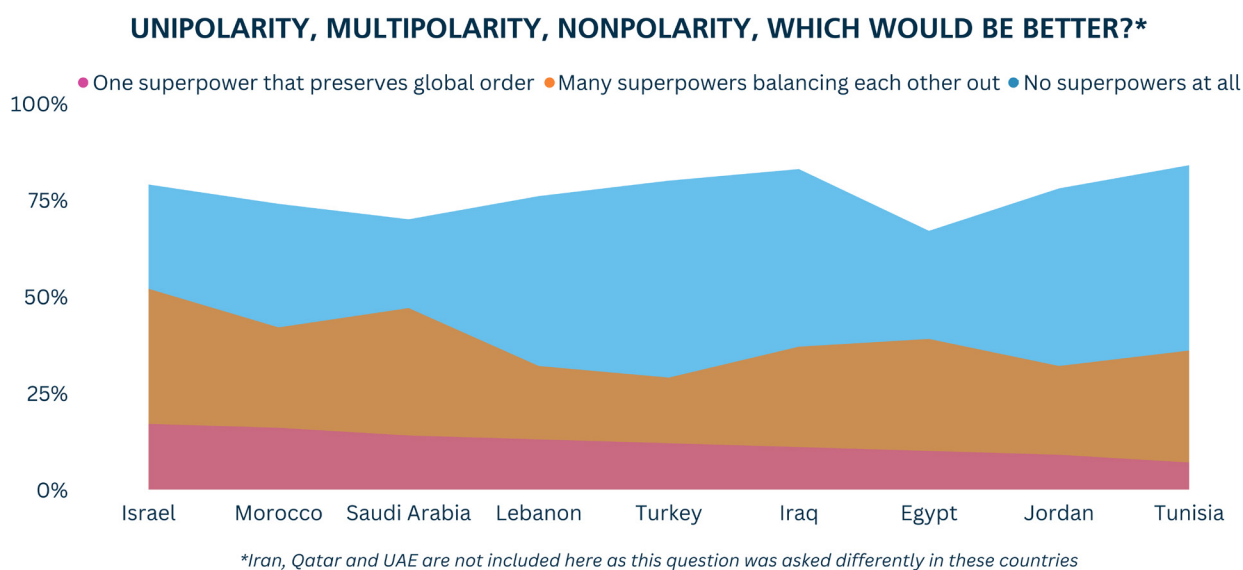
Graph 24



GLOBAL POLARITY: TO SUPERPOWER OR NOT TO SUPERPOWER?

Survey respondents were asked to indicate how they feel about the role played by superpowers in the world today. A majority of respondents in the surveyed countries reported that they would prefer a different status quo, more concretely that the world would be better off either with various superpowers balancing each other out, or if there were no superpowers at all. **(Graph 25)**

Graph 25



More Turkish respondents felt that there should be no superpowers at all than respondents from other countries, at 51%.¹³⁶ Inte-

¹³⁶ This question was asked differently in Iran, Qatar and UAE than in the other survey countries, which leads to different values (in percent) for all other countries if this difference (in number of answer options) is controlled for. Yet, even when controlled for, responses from Türkiye which reject any superpower at all still figure highest among all survey countries.

restingly the Turkish government has indicated ambitions to become an accepted regional and even global power, often domestically using the narrative of “foreign powers” preventing this.

Türkiye was a crucial ally for the West during the Cold War era due to its strategic positioning, a position of strength that shifted in the eyes of the US after reparations were made.¹³⁷ A tendency to prefer no superpowers could stem from the belief that only then will Türkiye be fully accepted as a globally significant state. Similar high percentages indicating a wish for no superpowers were observed in Tunisia, at 48%, Iraq and Jordan, both at 46%, Lebanon, at 44% and Iran at 41%.

Overall, a clear tendency in all countries in the above graph is for no superpowers; only Israel and Saudi Arabia showed a higher preference for many superpowers to balance each other out.

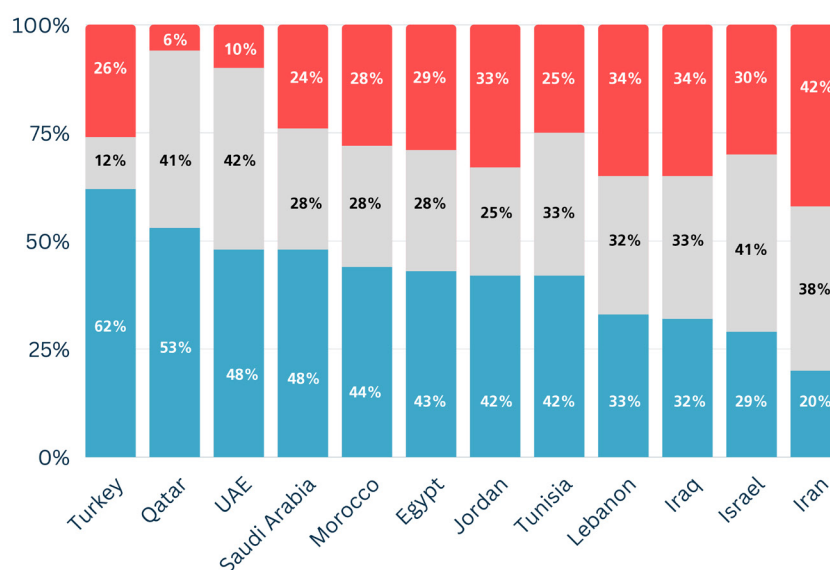
Again, the Iran-Saudi rapprochement is not considered, and this might change the nature of responses. But based on the situation at the time of surveying, it is evident that Israel not only needs the US and Russia for its economic and political survival, but also that Saudi Arabia assumes a controlling and balancing aspect of more than one superpower for its regional animosities as well as its more global aspirations.

PEACE AND SECURITY IN THE REGION - EXPECTATIONS FOR THE COMING YEARS

Interestingly, optimism for future peace and security across the region prevailed among many respondents. When asked about how they would expect peace and security in the Middle East to develop in the next five years, more respondents in eight out of twelve countries expected improvements than a deterioration, particularly in Türkiye (62% “improve”) and Qatar (53% “improve”). Among those four countries that did not align with this trend, respondents in three countries were fairly divided between optimism and pessimism, with a plurality in Israel expecting the situation to stay the same (41%). Only respondents in Iran were substantially more likely to say they thought future peace and security would deteriorate (42%). **(Graph 26)**

OVER THE NEXT FIVE YEARS, DO YOU EXPECT PEACE AND SECURITY IN THE MIDDLE EAST TO...

- Improve
- Deteriorate
- Stay the same



Graph 26

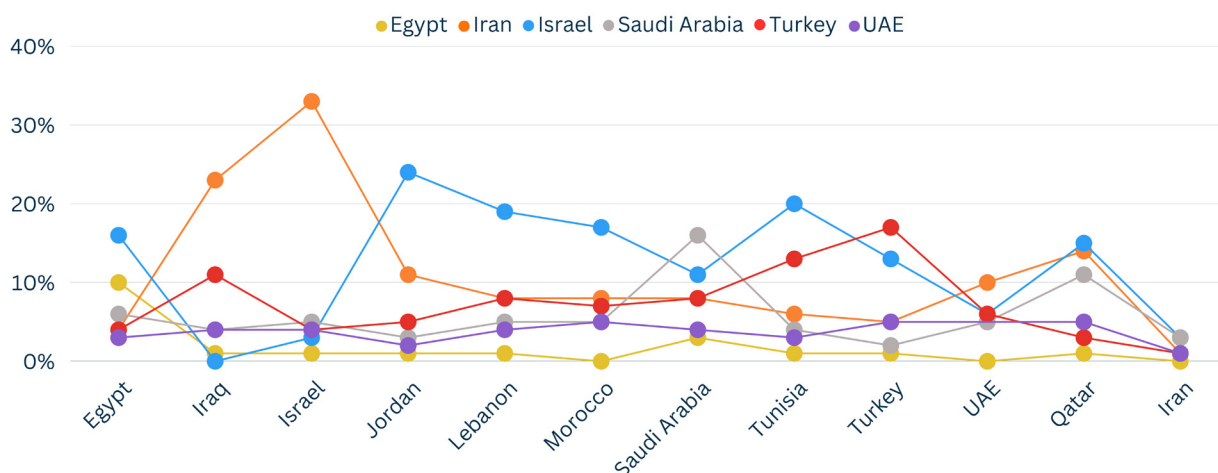
ZOOMING INTO NATIONAL CONTEXTS IN THE MENA: WHERE TO PLACE THEM IN THIS GLOBAL POWER SHIFT

This section aims to provide a more nuanced understanding at a country level for all countries surveyed. This allows for a better comprehension of some of the results while identifying crucial points for analysis and future consideration.

Before exploring the countries' and regions' particularities a bit more in detail, it is interesting to compare the respondents' views on which country in the region they believed to benefit the most from the Russia-Ukraine conflict. For the analysis, we focused on Egypt, Iran, Israel, Saudi Arabia, Türkiye, and the UAE as perceived profitters. **(Graph 27 next page)**

¹³⁷ "Turkey and the United States after the Cold War: From Alliance to Ambivalence" by Ian O. Lesser: This book examines the changing dynamics of the U.S.-Turkey relationship in the post-Cold War era, including the challenges and areas of cooperation. Book link: https://www.rand.org/pubs/monograph_reports/MR1461.html

WHICH COUNTRY IN THE REGION BENEFITS THE MOST FROM THE RUSSIA-UKRAINE CONFLICT?



Graph 27

Unsurprisingly, more than 30% of Israeli respondents saw Iran as the main beneficiary of the conflict in the MENA region. This is quite an outlier amongst all surveyed countries. Half of the countries (Egypt, Jordan, Lebanon, Morocco, Tunisia and Qatar) see Israel as the main beneficiary; partially, this could be explained with historic enmity. Egypt, Saudi Arabia and the UAE were not seen as benefiting that much which raises questions specifically for the latter two as oil exporters and new trade possibilities with the West due to the conflict; This seems to not be perceived the same way in the region. Lastly, Türkiye is also not perceived as benefiting that much from the conflict, however with almost 20% of respondents in Türkiye believing that their country is benefiting from the war, the brokered Black Sea Grain Initiative as well as mediation efforts by the former and current government seem to be in respondents awareness when answering this question.

IRAN: IS ANTI-AMERICANISM STILL IN FASHION?

While Russia and Iran have formed a partnership of convenience against Western powers in the past, the relationship has historically been tinged with undercurrents of wariness and distrust, according to several analysts.¹³⁸ Tehran-Moscow relations appear to have strengthened recently. Evidence of continuing weapons deals between Russia and Iran was on full display as more than eighty Iranian-made drones launched by the Russian military were shot down over Ukraine in the first 48-hours of 2023.¹³⁹ Iran has reportedly provided Russia with military advisers to train Russian military personnel on drone warfare.¹⁴⁰ And top Russian officials also reportedly visited Iran in early 2023 to finalize a deal to purchase Iranian ballistic missiles.¹⁴² And yet a plurality of 49% of Iranian respondents said they trusted the US more than Russia to do the right thing in the Middle East, suggesting significant differences between public and state positionality in Iran.

Other questions also yielded results suggesting a more positive public stance on the US; for instance, fewer Iranian respondents blamed the US for starting the Russia-Ukraine War than in any other country surveyed except Israel, despite anti-Americanism being a key aspect of Iran's political system and foreign policy.

The protest movement that erupted in 2022, with the death of Jina Mahsa Aini after being in police custody, also suggests developments in public attitudes that deviate from the ruling elite. After 44 years of the Islamic Republic, Iran's population may be sho-

138 Robbie Gramer and Amy Mackinnon (2023): Iran and Russia Are Closer Than Ever Before, Foreign Policy, Retrieved at: <https://foreignpolicy.com/2023/01/05/iran-russia-drones-ukraine-war-military-cooperation/>

139 Mike Brest (2023), Russia launches more than 80 Iranian drones at Ukraine to start 2023, Washington Examiner, Retrieved at: <https://www.washingtonexaminer.com/policy/defense-national-security/russia-launches-more-than-80-iranian-drones>

140 Katie Bo Lillis, Natasha Bertrand (2022): Iran has sent military trainers to Crimea to train Russian forces to use drones, CNN, Retrieved at: <https://edition.cnn.com/2022/10/18/politics/iran-trainers-crimea-drones/index.html>

141 Ibid.

142 Anatoly Kurmanav and Marc Santora (2022): Putin's top security official visits Iran as Russia seeks precision weapons, The New York Times, Retrieved at: <https://www.nytimes.com/2022/11/09/world/europe/putin-patrushev-russia-iran.html>

wing signs of disillusionment with the official narrative and beginning to position itself at odds with the ruling system.¹⁴³ This is noteworthy but should be approached with caution as data collection was only possible in four cities in Iran (cf. methodology), so we cannot extrapolate these findings to the whole country and need to take into consideration rural realities.

Two thirds of Iranian respondents said they personally felt the effects of the Russia-Ukraine War and a narrow majority of 55% felt the country's official stance on the war had a tangible impact on Iran's economy. Concerns about the rising cost of living and economic recession in Iran were also evident. These economic implications are particularly significant in a country that has recently experienced months of severe civil unrest partially attributed to the high cost of living and soaring prices of consumer goods.¹⁴⁴ However, structural barriers such as persistent economic stagnation, widespread corruption and rampant inflation that constitute the background for much of what Iranians have had to go through are inherent to the current Iranian socio-economic system and date back to before the current war.^{145 146}

Iranian respondents were most concerned about conflict dynamics and economic repercussions. Although Iran neighbors Afghanistan, conflict-ridden for much of its recent past, and hosts one of the tenth biggest populations of forcibly displaced persons worldwide, as well as the third biggest in Asia and the Pacific,¹⁴⁷ concerns over increasing numbers in refugee arrivals were low among Iranian respondents (4%). Most Ukrainians forced to flee have moved to Europe,¹⁴⁸ and a majority of Iranian respondents said their country supports Russia in this conflict, so any major influx of forcibly displaced Ukrainians may have been felt too unlikely to be of concern.

Results from Iranian respondents did not align with Iranian state positionality, which was an anomaly among other countries surveyed, where government positions and popular opinion were

more in accord. This was most evidently visible on questions of who is to be blamed for continuing the war (over 50% blame Russia), a even distribution between supporting (52%) and opposing (48%) US retrenchment from the region while believing that Europe needs the US to defend itself (65%) and not believing that US military retrenchment will make the region more safe.

ISRAEL: THE KNOWN OUTSIDER

Israeli responses to the survey's more politically focused questions differed significantly to most of the other countries included in the survey. When it comes to questions with an economic aspect, the divergence of responses needs to be nuanced: Israeli respondents did not connect skyrocketing living costs solely to the Russia-Ukraine War. David Rosenberg wrote in Haaretz:

*"As the world fragments into new trading blocs, Israel and its small, open economy face serious problems to which our leaders seem willfully blind. Israel has been spared the worst of the brief fallout from the war. Our trade with Russia and Ukraine was infinitesimal to begin with - about \$1.1 billion the year before the war, or just 0.7 percent of Israel's total trade. Our natural gas reserves did a lot to shield the economy from the initial surge in global energy prices. The only thing spoiling Israel's party was consumer prices, which have risen 5.4 percent since the Ukraine war began, the fastest pace since 2008. And the inflation problem isn't going away soon."*¹⁴⁹

Interestingly, there are similarities between responses from the Israeli and Iranian samples. There is a pronounced sympathy among the public in Israel towards the fate of Ukrainians, many of whom morally side with the Western perspective on the conflict¹⁵⁰ – a view not so different from that of Iranians when it comes to this particular conflict.¹⁵¹ This is particularly noteworthy when taking into consideration the historic rivalry between the two countries. Israel and Iran have a longstanding rivalry fueled by conflicting regional interests and religious differences. Israel is deeply concerned about Iran's nuclear program and has opposed the Iran nuclear deal. The two countries have also been involved in proxy conflicts across the Middle East, with Israel targeting Iranian-backed forces in Syria and viewing militant groups

143 Patrick Clawson (2023). Inside Iran's regime (part 1): Growing fissures and poor morale in the IRGC? Retrieved from <https://www.washingtoninstitute.org/policy-analysis/inside-irans-regime-part-1-growing-fissures-and-poor-morale-irgc>

144 Nikolay Kozhanov (2022): The Economic backdrop of Iran's protest, Middle East Institute (MEI), Retrieved at: <https://www.mei.edu/publications/economic-backdrop-irans-protests>

145 Mohammad Reza Farzanegan (2023): What are the big economic challenges facing the government in Iran?, Economics Observatory, Retrieved at: <https://www.economicsobservatory.com/what-are-the-big-economic-challenges-facing-the-government-in-iran>

146 Mardo Soghom (2022): Iran's Economic Crisis Turning Into Economic Chaos. Iran International. Retrieved at: <https://www.iranintl.com/en/202212133199>

147 United Nations High Commissioner for Refugees (UNHCR) (2022): Global Trends. Forced Displacement in 2021. Retrieved at: <https://www.unhcr.org/media/40152>

148 Omer Karasapan (2022): Ukrainian refugees: Challenges in a welcoming Europe, Brookings Institution, Retrieved at: <https://www.brookings.edu/blog/future-development/2022/10/14/ukrainian-refugees-challenges-in-a-welcoming-europe/>

149 David Rosenberg (2023): Second Year of the Ukraine War May Spell Trouble for Israel, Haaretz, Retrieved at: <https://www.haaretz.com/israel-news/2023-02-22/ty-article/.premium/the-ukraine-war-is-killing-globalization-can-israel-cope/00000186-796c-d2a6-a7f7-ff7fd0430000>

150 Charles W. Dunne (2023): Arab and Israeli Positions on Ukraine War Continue to Frustrate the US. Arab Center Washington DC. Retrieved at: <https://arabcenterdc.org/resource/arab-and-israeli-positions-on-ukraine-war-continue-to-frustrate-the-us/>

151 Nancy Gallagher, Ebrahim Mohseni and Clay Ramsay (2022): Iranian Public Opinion on the War in Ukraine and Nuclear Options. A public opinion interim report, August 2022, University of Maryland: The Center for International and Security Studies at Maryland (CISSM). Retrieved at: https://ciissm.umd.edu/sites/default/files/2022-08/Final-Iranian%20Public%20Opinion_August%202022.pdf

supported by Iran as security threats.

87% of Israeli respondents attributed responsibility for starting the war and 80% for continuing it to Russia, in contrast to responses from other countries, where respondents were more divided on who they thought was responsible. However, while Israel condemned Russia's invasion of Ukraine, it declined to join Western-led economic sanctions against Russia. Kyiv expressed genuine concern about Israel's stance and called for it to take a more supportive position. According to Anna Borshchevskaya, a senior fellow at The Washington Institute for Near East Policy, Israel remains apprehensive about risking its crucial national security interests in Syria by angering Russia. Nevertheless, there are domestic elements and U.S. officials pressuring Israel to take more action.¹⁵²

Israeli respondents' opinions regarding Russia in Ukraine appear to be predominantly negative. Despite the ambiguous nature of the official discourse, 51% of Israeli respondents believed that Israel supports Ukraine, while 39% said that their country was neutral. Additionally, 73% of Israelis felt that the ongoing war had the most significant negative impact on Ukraine, while opinions were divided regarding its impact on Israel itself, with 45% perceiving a negative impact and 35% reporting no discernible effect.

According to the survey, 54% of Israelis viewed the war as just one of many battlefields in a larger conflict between Russia and the West. Regarding perceptions of Russia's involvement in the Middle East, 67% of Israeli respondents considered it harmful. This perspective corresponded with regional perceptions of Russia's involvement in the Middle East, which was considered more harmful than beneficial by respondents in ten out of twelve surveyed countries.

Significantly more Israeli respondents said they trusted the US to do the right thing in the Middle East, at 76%, and 53% said they thought the region would be less safe if the US withdrew. Meanwhile, 44% of Israeli respondents said they would not support a larger EU presence in the region. These figures clearly underline the strong bond that has prevailed between Israel and the US for decades, in contrast to the more ambivalent relationship between Israel and the former Soviet Union and Russia.¹⁵³ Overall, 40% of the Israeli sample believed that the peace and security situation in the Middle East would remain the same in the coming five years.

While Israel's decision not to join Western-led economic sanctions against Russia drew criticism from Ukraine, it was driven

by concerns over potential risks to its national security interests in Syria, according to Borshchevskaya.

Although viewed as the biggest and most strategic US ally in the region,¹⁵⁴ Israel has struggled to determine its position vis-à-vis the Russia-Ukraine War.¹⁵⁵ Being home to almost one million Russian-speaking citizens, a substantial number of whom are of Ukrainian origin, the conflict has put the country and its leadership into a serious dilemma. Along with the increase in the number of immigrants from the former Soviet Union over time, their influence on Israeli politics has grown as well, illustrated by political parties such as the nationalist right-wing Yisrael Beiteinu, founded in the 1990s and owing much of their political influence to Russian-speaking constituencies.

Even when Israel tried to weigh in by attempting to mediate between Russia and Ukraine in the early days of the war, it was Türkiye that ultimately took on this role.¹⁵⁶ Along similar lines, since the start of the Russia-Ukraine War, Israel has refused multiple requests from Ukraine for weapons.¹⁵⁷ While Ukraine remains keen to get its hands on Israeli air-defense technologies, Israeli officials initially expressed concerns that the move could damage Israel's relations with Russia.¹⁵⁸

At the same time, Russia's acquiescence has been essential to Israeli military operations against Iranian forces in Syria which – along with fostering its close relationship with the US – has emerged as a key national security interest for Israel.

Israel also has two core national security interests linked to Russia and Ukraine: 1. The maintenance of good relations with the US in a general sense, and 2. Russian acceptance of Israel's freedom to operate militarily against Iranian forces, rocket launching sites and arms smuggling in Syria.¹⁵⁹

GULF COUNTRIES: WHAT'S OIL GOT TO DO WITH IT?

¹⁵² Anna Borshchevskaya (2022): Why Israel Is Hesitant About Supplying Ukraine with Air Defense Systems, Policy Analysis, The Washington Institute for Near East Policy, Retrieved at: <https://www.washingtoninstitute.org/policy-analysis/why-israel-hesitant-about-supplying-ukraine-air-defense-systems>

¹⁵³ Micky Aharonson (2018): Relations between Israel and the USSR/Russia, Retrieved at: <https://jiss.org.il/en/aharonson-relations-israel-ussr-russia/>

¹⁵⁴ Michael Eisenstadt and David Pollock (2012): Friends with Benefits: Why the U.S.-Israeli Alliance Is Good for America, The Washington Institute for Near East Policy, Retrieved at: <https://www.washingtoninstitute.org/policy-analysis/friends-benefits-why-us-israeli-alliance-good-america>

¹⁵⁵ Ramzy Baroud (2023): Israel is struggling to maintain a coherent position on Russia and Ukraine, Middle East Monitor, Retrieved at: <https://www.middleeastmonitor.com/20230214-israel-is-struggling-to-maintain-a-coherent-position-on-russia-and-ukraine/>

¹⁵⁶ Ibid

¹⁵⁷ Eric Schmitt, Adam Entous, Ronen Bergman, John Ismay and Thomas Gibbons-Neff (2023): Pentagon Sends U.S. Arms Stored in Israel to Ukraine, The New York Times, Retrieved at: <https://www.nytimes.com/2023/01/17/us/politics/ukraine-israel-weapons.html#:~:text=Israel%20has%20consistently%20refused%20to,its%20munitions%20from%20the%20stockpile>

¹⁵⁸ Ibid.

¹⁵⁹ Thomas O. Falk (2023): Will Israel and Russia forge closer ties under Netanyahu? Al Jazeera, Retrieved at: <https://www.aljazeera.com/news/2023/1/12/israel-and-russia-may-forge-closer-ties-under-netanyahu>

Saudi Arabia has attempted to keep a balanced stance towards the invasion of Ukraine by Russia — which should not be misunderstood as neutrality.¹⁶⁰ Saudi Arabia voted in favor of a United Nations General Assembly (UNGA) resolution which condemned Russia's invasion of Ukraine in early March 2022, alongside Bahrain, Egypt, Kuwait, Jordan, Qatar and the UAE.¹⁶¹ At the same time, Saudi Arabia has maintained close contacts with Moscow starting in the aftermath of the US-led 2003 Iraq War, especially when it comes to Saudi-Russian coordination within the OPEC+ cartel — this line of Saudi policy is in direct opposition to what the US government has demanded of Riyadh.¹⁶²

While the Gulf states do not entirely side with the Russian view, there is some understanding of Russia's national security concerns, according to founder and chair of the Gulf Research Center, Dr. Abdulaziz Sager.¹⁶³ His interpretation may pave the way for an understanding of the Saudi position in the conflict, as he explains:

*"What is striking from a Saudi point of view is the similarity between Ukraine and Yemen. In Yemen, Saudi Arabia has been advocating for a safe border, a friendly government free from hostile influence, and no extended military threats. Russia has somewhat the same problem with Ukraine, if, for example, NATO was stationed in the country."*¹⁶⁴

Other reports suggest that Saudi Arabia (and the UAE for that matter) may also refrain from taking a clear position on the Russia-Ukraine war, driven by the perception that the US did not provide them with sufficient support in their struggle against Houthi rebels in Yemen.¹⁶⁵ At the same time, Saudi Arabia's, long-term, strategic alliance with the US plays a considerable role as well, based on the core logic of US military protection in exchange for a reliable oil supply by the kingdom, including pricing of oil in US dollars and Saudi support for US foreign policy

operations worldwide.¹⁶⁶

This long-term alliance has come under pressure from recent talks and the subsequent restoration of bilateral relations between Saudi Arabia and Iran, brokered by China.¹⁶⁷ While the repercussions on US-Saudi relations remain to be seen, commentators have credited "[t]his landmark agreement [with] the potential to transform the Middle East by realigning its major powers, replacing the current Arab-Iranian divide with a complex web of relationships, and weaving the region into China's global ambitions."¹⁶⁸

Although a complete rupture appears unlikely, tensions between Saudi Crown Prince Mohammad bin Salman and US President Joe Biden over oil production policies could have significant implications. These implications are not limited to the Saudi position towards the war in Ukraine, but also extend to the perceptions of Saudi Arabian citizens about the impact of the war, who is responsible for waging and continuing it, and whether this war represents a turning point in the history of the international system and in the struggle for hegemony among nations.

Historically, Saudi Arabia has held a pivotal role as a crucial ally of the United States in the Arab world. The alliance between the two countries dates back several decades and has been characterized by various aspects of cooperation and mutual interests. The United States has been a key partner in supporting Saudi Arabia's security, providing military assistance, and participating in joint defense exercises. Additionally, the United States has been a major importer of Saudi oil, further strengthening economic ties between the two nations. Over the years, the close relationship between Saudi Arabia and the United States has encompassed diplomatic engagements, trade agreements, and cultural exchanges, solidifying their strategic partnership in the Middle East region.

However, relations have faced strains even before the war, exemplified by President Biden labeling Saudi Arabia as a pariah state during the election campaign.¹⁶⁹ Despite the close ties between Riyadh and Trump's administration, not everything was smooth, with the United States displaying a lack of willingness to take action following the 2019 Saudi Aramco attacks perpetrated by Iranian proxies.

Saudi respondents felt particularly concerned by higher grocery

160 Institut Montaigne (2022): The Ukraine Crisis and the Gulf: A Saudi Perspective, Interview with Abdulaziz Al Sager, Retrieved at: <https://www.institutmontaigne.org/en/analysis/ukraine-crisis-and-gulf-saudi-perspective>

161 Ibid.

162 Guy Laron (2023): The OPEC+ Puzzle: Why Russian-Saudi Cooperation Starts - and Stops - with Oil Prices, Wilson Center, Retrieved at: <https://www.wilsoncenter.org/article/opecc-puzzle-why-russian-saudi-cooperation-starts-and-stops-oil-prices>

163 Institut Montaigne (2022): The Ukraine Crisis and the Gulf: A Saudi Perspective, Interview with Abdulaziz Al Sager, Retrieved at: <https://www.institutmontaigne.org/en/analysis/ukraine-crisis-and-gulf-saudi-perspective>

164 Ibid.

165 Mark N. Katz (2022): Why US allies in the Middle East aren't taking sides in the Ukraine war, Atlantic Council, Retrieved at: <https://www.atlanticcouncil.org/blogs/new-atlanticist/why-us-allies-in-the-middle-east-arent-taking-sides-in-the-ukraine-war/>

166 Jeff D. Colgan (2021): Partial Hegemony: Oil Politics and International Order, Oxford University Press, Retrieved at: <https://academic.oup.com/book/39203?login=false>

167 Maria Fantappie and Vali Nasr (2023): A New Order in the Middle East? Iran and Saudi Arabia's Rapprochement Could Transform the Region, Foreign Affairs, Retrieved at: <https://www.foreignaffairs.com/china/iran-saudi-arabia-middle-east-relations>

168 Ibid.

169 David E. Sanger (2021): Candidate Biden Called Saudi Arabia a 'Pariah.' He Now Has to Deal With It, The New York Times, Retrieved at: <https://www.nytimes.com/2021/02/24/us/politics/biden-jamal-khashoggi-saudi-arabia.html>

prices as a result of the Russia-Ukraine War (41% felt personally affected) mirroring their main concern, which was increased cost of living (20%). Other felt effects and expressed concerns related to the war included feelings of insecurity over the potential for conflict spillover (10%). This might come as little surprise in view of Saudi Arabia's pronounced rivalry with Iran until recently, which has driven many conflicts in its surroundings.¹⁷⁰

Deep-rooted regional rivalry, fueled by geopolitical competition, ideological differences, and sectarian tensions between the predominantly Sunni Saudi Arabia and predominantly Shia Iran comes with concerns about Iran's expansionist ambitions in the Middle East. Particularly its support for proxy groups across the region, such as Hezbollah in Lebanon and the Houthis in Yemen, which Saudi Arabia perceives as a direct threat to its own security and influence. The Saudi leadership views Iran's nuclear program and its potential to acquire nuclear weapons as a grave security concern, as it could upset the regional balance of power and embolden Iran to exert even greater influence, further exacerbating Saudi Arabia's fear of conflict with its regional rival.

Qatar presents an interesting case of balancing foreign policy, and flexing soft power muscles,¹⁷¹ poised as it is to become a big energy supplier to Europe, as it turns away from Russia.¹⁷² Historically a leading exporter of liquefied natural gas to Asian countries, Qatar is also drawing closer to China, undermining Russian hopes of diverting to Asia most of the energy Europe is no longer purchasing from it.¹⁷³ Qatar is becoming an indispensable energy supplier, with very low costs due to its vast natural gas reserves – enabling it to sell this natural resource for longer¹⁷⁴ than the mainly one fossil fuel dependent exporters such as Saudi Arabia as climate change forces many countries to reduce their use of fossil fuels.¹⁷⁵

When speaking before the 49th session of the Human Rights Council in Geneva in February 2022, Qatar stressed its "...respect for Ukraine's sovereignty, independence, and territorial

integrity within its internationally recognized borders."¹⁷⁶ Albeit a clear position in favor of Ukraine at the time, Qatar's positionality has since been put into question amid competing interests. Tensions between Qatar and Russia, rooted in Russia's counter-revolutionary agendas in the Arab region during the so-called Arab Spring where Qatar largely supported protest and the Islamist movement, have eased.

The two states have found ways to pragmatically cooperate, particularly in the areas of sports, tourism, infrastructure, and investment. This has pushed Qatar into a more balanced position towards the Russia-Ukraine War.¹⁷⁷ With this in mind, Qatar has been careful to avoid reacting to the war in a manner that could damage its relationship with Russia. This desire to maintain cordial relations led to a meeting between leaders from the two countries on the sidelines of the sixth summit of the Conference on Interaction and Confidence Building in Kazakhstan in October 2022.¹⁷⁸ The meeting, interpreted as an attempt to diffuse tensions between Russia and Qatar, was also viewed as an attempt to cement Qatar's role as a conflict mediator.¹⁷⁹

Emiratis and Qataris were most likely to indicate a belief that the role played by Russia in the Middle East was "beneficial to the people and countries in the region" at 49% and 44% respectively. For both countries, this is not surprising: While **UAE** and Russia already exhibited strong economic bonds such as in oil trade and real estate investments, economic cooperation with Russia has recently become increasingly significant for Qatar too, as a result of economic pressure by its Arab neighbors in the Gulf.¹⁸⁰ ¹⁸¹ ¹⁸² A more modest 24% of Saudi Arabian respondents said they thought Russia's Middle East role was beneficial. This was still higher than in countries like Lebanon at 22% and Tunisia and Egypt at 20%.

The percentage of people who trusted Russia more than the US to do the right thing in the Middle East was highest in the UAE, at 41%, compared with 27% who said they trusted the US more. It is difficult to make a general statement about the relatively high sympathy UAE respondents had towards Russian involvement in the region. It is important to consider the economic

170 World Politics Review (2023): Iran and Saudi Arabia Battle for Supremacy in the Middle East. Retrieved at: <https://www.worldpoliticsreview.com/israel-iran-saudi-arabia-battle-for-supremacy-in-the-middle-east/>

171 Girogio Cafiero (2022): Russian-Ukrainian conflict: What does it mean to Qatar?, TRT World, Retrieved at: <https://www.trtworld.com/opinion/russian-ukrainian-conflict-what-does-it-mean-to-qatar-55415>

172 Clifford Krauss (2022): Qatar Extends Its Natural Gas Dominance at Russia's Expense, New York Times, Retrieved at: <https://www.nytimes.com/2022/12/09/business/energy-environment/qatar-gas-oil.html>

173 Ibid.

174 Qatari gas lasts longer than some other fossil fuel sources due to Qatar's abundant reserves, advanced extraction techniques, and lower consumption rate compared to coal or oil. Additionally, Qatar's efforts to diversify its energy sources through investments in renewables aim to reduce reliance on natural gas and extend the lifespan of its fossil fuel reserves.

175 Clifford Krauss (2022): Qatar Extends Its Natural Gas Dominance at Russia's Expense, New York Times, Retrieved at: <https://www.nytimes.com/2022/12/09/business/energy-environment/qatar-gas-oil.html>

176 Ibid.

177 Ibid.

178 Al Jazeera (2022): Qatari emir meets Putin in Kazakhstan, Retrieved at: <https://www.aljazeera.com/news/2022/10/13/qatari-emir-putin-discuss-ukraine-energy-markets-world-cup>

179 Ibid.

180 Sean Mathews (2023): Sanctions on Russian bank raise questions about 'sanctions-proofing' in Gulf, Middle East Eye, Retrieved at: <https://www.middleeasteye.net/news/sanctions-russian-bank-raise-questions-sanctions-proofing-gulf>

181 Yousef Saba (2022): Russians are Dubai's top non-resident property buyers in Q3: report, Zawya, Retrieved at: <https://www.zawya.com/en/business/real-estate/russians-are-dubais-top-non-resident-property-buyers-in-q3-report-vetsg12v>

182 DW (2017): Qatar and Russia to 'bolster' economic ties. Retrieved at: <https://www.dw.com/en/qatar-and-russia-to-bolster-economic-ties/a-40299911>

ties between the two countries, particularly in the areas of oil and gas, as well as military and political cooperation—especially in Syria, where the UAE saw Russia as a counterbalance to Iranian influence. It seems probable that a large part of the UAE sample was influenced by their government's foreign policy.

TÜRKİYE: TANGOING BETWEEN NATO AND THE DUMA

Türkiye is positioning itself as a mediator in the ongoing Russia-Ukraine War – ultimately capitalizing on its unique position of having friendly relations with both Russia and Ukraine, while maintaining its support for Ukraine's territorial integrity and sovereignty.¹⁸³

Türkiye has had a difficult relationship with Russia, altering between cooperation, political competition and explicit disagreement between Ankara and Moscow. This intricate interaction manifests in the state's support for opposing sides in various conflicts such as Syria, Libya and Nagorno-Karabakh. In addition, Türkiye's NATO membership further complicates the link between the countries, with such a military alliance perceived by Russia as a threat and an opponent in the Russia-Ukraine war.¹⁸⁴

Economic and trade relations constitute the driving force behind Turkish-Russian relations. Russia has been one of Türkiye's most important trade partners, with trade between both countries amounting to 26,309 billion USD in 2019. This entailed Turkish exports of 3,854 billion USD and imports of 22,454 billion USD, predominantly for energy supply.¹⁸⁵

Turkish-Ukrainian relations developed more positively in the period before the Russia-Ukraine War, with Türkiye essentially viewing its relationship with Ukraine as one means to foster its own emergence as an influential regional player, including by making use of its economic and political ties with Ukraine to bolster its role in the Black Sea basin.¹⁸⁶ However, Russia has always constituted greater economic and security value as a partner for Türkiye than Ukraine has.¹⁸⁷

In evident prioritization of its national interests, Türkiye has sub-

sequently been prepared to disregard not only Ukraine's, but also its Western allies' opinion when this conflicts with its own security and political agendas. Such was the case when Türkiye signed up for Russia's TurkStream pipeline project to bypass Ukrainian territory in delivering Russian gas to Europe in 2016.¹⁸⁸ Türkiye also purchased S-400 missile systems from Russia, despite criticism from both the US and its NATO allies—a decision ultimately leading to then US President Donald Trump imposing sanctions on the country under the Countering America's Adversaries Through Sanctions Act (CAATSA).¹⁸⁹

As the only NATO member country in the region, Türkiye is engaging in a policy often characterized as "strategic balancing,"¹⁹⁰ closing access to the Turkish straits for Russian military vessels, brokering the Black Sea Grain Initiative with the UN, and maintaining ties both with Ukraine and Russia, despite Western criticism. Türkiye's provision of military support to Ukraine through the use of Bayraktar drones represents a more assertive action that could potentially strain its relationship with Russia.¹⁹¹

Türkiye's position in this conflict is therefore quite delicate. By controlling geopolitical dynamics in the Black Sea basin and the mandatory passage from the Black Sea to the Mediterranean through the Bosphorus and the Dardanelles, Türkiye has a crucial strategic location and role. Therefore, it is closely concerned with the course of the conflict developments, and one could expect its population to be more concerned about the dangers of an uncontrolled escalation in Ukraine.

JORDAN: A STABLE MONARCHY TO STEADY US INTERESTS IN THE REGION?

Given its close ties to the US and Europe, Jordan has gone to great lengths to tread diplomatic waters carefully in the wake of the Russia-Ukraine War. While the Jordanian government and King Abdullah have expressed their concern over the war and reaffirmed the key principle of state sovereignty, calling for a political solution, any statement about Russia or who is to be

183 Ibrahim Altay (2022), Trust in Türkiye to mediate Ukraine-Russia war continues: Erdogan, Daily Sabah, Retrieved at: <https://www.dailysabah.com/politics/diplomacy/trust-in-turkiye-to-mediate-ukraine-russia-war-continues-erdogan>

184 International Crisis Group (2022): Türkiye and Russia's Complicated Relationship, Retrieved at: <https://www.crisisgroup.org/global/turkey-and-russias-complicated-relationship>

185 Turkish Ministry of Foreign Affairs (2023): Relations between Türkiye and the Russian Federation, Retrieved at: <https://www.mfa.gov.tr/reasons-between-turkey-and-the-russian-federation.en.mfa#:~:text=Economic%20and%20trade%20relations%20constitute,and%2022%2C454%20billion%20USD%20imports>

186 Iliya Kusa (2022): From Ally to Mediator: How Russia's Invasion Has Changed Ukraine-Türkiye Relations, Carnegie Endowment for International Peace, Retrieved at: <https://carnegieendowment.org/politika/88097>

187 Ibid.

188 Vladimir Soldatkin and Olesya Astakhova (2022): Analysis: Europe wary of Turkish hub to hide gas 'made in Moscow', Reuters, Retrieved at: <https://www.reuters.com/business/energy/europe-wary-turkish-hub-hide-gas-made-moscow-2022-11-30/>

189 Al Jazeera English (2021): Erdogan: Türkiye could buy more Russian S-400s despite US warnings, Retrieved at: <https://www.aljazeera.com/news/2021/9/26/erdogan-turkey-could-buy-more-russian-s-400s-despite-us-warnings>

190 Howard Eissenstatt (2023): "Türkiye playing for regional power on the margins, Middle East Institute, Retrieved at: <https://www.mei.edu/blog/special-briefing-grinding-war-vs-russian-loss-ukraine-impact-challenges-and-policy#eissenstat>

191 Brian Michael Jenkins (2023): Consequences of the War in Ukraine: Two Areas of Contention—Türkiye and the Balkans, The RAND Blog, RAND Corporation. Retrieved at: <https://www.rand.org/blog/2023/03/consequences-of-the-war-in-ukraine-turkey-and-the-balkans.html>

seen as the aggressor was carefully avoided.¹⁹² ¹⁹³ Even after voting in favor of the UNGA resolution which condemned Russia's invasion of Ukraine in early March 2022, Jordanian diplomatic discourse has strategically refrained from calling Russia the aggressor in the conflict.¹⁹⁴ In spite of this, 46% of Jordanian respondents held Russia responsible for starting the war, casting doubt on whether or not the US and EU relationship is of greater strategic importance to the population than the relationship with Russia. Notwithstanding this divide within Jordan, the US State Department however reaffirmed the "deep strategic relationship" between the US and the Hashemite Kingdom of Jordan in April 2022.¹⁹⁵

Despite Jordan's position as an important US ally, Jordan and Russia did agree to step up coordination in tackling instability in southern Syria in 2022. Jordan blamed trouble in the region on Iran-linked militias and multi-billion dollar, cross-border drug smuggling.¹⁹⁶ This recent alignment in areas of common strategic interest is an important consideration as we unpack data generated from Jordan.

Jordanian respondents were generally more negative about Russian presence in the region, with 55% of respondents saying they thought it was generally more harmful. Experience of Russian involvement in the Syrian War has likely not aided this. While 67% of Jordanian respondents indicated that they are in favor of US retrenchment from the region, 60% did not support the replacement of the US military presence by a European military presence.

Jordan has historically been a strong ally of the US in the region and has managed to become one of the most stable countries in the region with a strong economy and relatively good standard of living. Due to its direct border with Syria and direct threats of spill-over as well as the presence of Syrian and Iraqi refugees, securitization of certain areas is well established.

Almost a quarter of respondents in Jordan believed that Israel benefits the most from the Russia-Ukraine War. Jordanian res-

pondents were slightly more optimistic than pessimistic about their expectations for Middle Eastern peace and security over the next five years, with 42% who said they expected it to improve and 33% who said they expected a deterioration.

IRAQ: 20 YEARS AFTER THE INVASION, WAR WOUNDS ARE STILL FRESH

Iraqi respondents shared a majority negative view of Russia's presence in the Middle East and the majority did not support replacement of US military roles in the Middle East by a European military presence.

In Iraq almost a quarter of respondents said they believed that, of the countries in the MENA region, Iran is benefitting the most from the Russia-Ukraine War. These results should be hardly surprising: Iraqis experienced first-hand how the Islamic Republic has benefited from conflicts in the past and expanded its influence, meddling in domestic affairs in Iraq ever since the US-led invasion in 2003. Iran's strong influence on the political landscape and decision makers in Iraq as well as the support provided to Iraqi militias have given rise to widespread resentment among large parts of Iraqi society.¹⁹⁷

Iraq has largely refrained from taking a firm position on the Russia-Ukraine War and abstained from the March UNGA vote,¹⁹⁸ justifying this with reference to its experiences of external interventions and war on its territory in recent history.¹⁹⁹ In view of Iraq's heavy history of armed conflict stretching from several wars in the region up to domestic turmoil among competing political and armed groups, this is not surprising. Nonetheless, opinions diverge internally along partisan and factional lines.²⁰⁰ According to a report by the Middle East Institute, the sanctions brought against Russia have complicated its energy investments in Iraq, and could have a long-lasting adverse impact on the Iraqi economy.²⁰¹

LEBANON: PREOCCUPIED BY ITS OWN ABYSS?

Lebanon is heavily impacted by the Russia-Ukraine War due to being mired within its own internal economic and political crises. Lebanon's official position on the war is not unanimous. In an official statement during the early stages, Lebanon's Ministry of Foreign Affairs condemned Russian military intervention

192 Jordan News Agency (2022): FM chairs NCSCM crisis cell meeting to follow up on Jordanians in Ukraine, Retrieved at: https://petra.gov.jo/Include/InnerPage.jsp?ID=41098&lang=en&name=en_news

193 The Hashemite Court of Jordan (2022): King holds talks with Chancellor Scholz, thanks Germany for supporting Jordan's development efforts, Retrieved at: <https://rhc.jo/en/media/news/king-holds-talks-chancellor-scholz-thanks-germany-supporting-jordan%E2%80%99s-development-efforts>

194 Jordan News Agency (2022): FM chairs NCSCM crisis cell meeting to follow up on Jordanians in Ukraine, Retrieved at: https://petra.gov.jo/Include/InnerPage.jsp?ID=41098&lang=en&name=en_news

195 US Department of State (2022): Secretary Blinken's Call with Jordanian Foreign Minister Safadi, Retrieved at: <https://www.state.gov/secretary-blinkens-call-with-jordanian-foreign-minister-safadi-2/>

196 Suleiman Al-Khalidi (2023): Jordan seeks more coordination with Russia to bring stability to southern Syria, Retrieved at: <https://www.reuters.com/world/middle-east/jordan-seeks-more-coordination-with-russia-bring-stability-southern-syria-2022-11-03/>

197 Kali Robinson (2022): How Much Influence Does Iran Have in Iraq? Council on Foreign Relations. Retrieved at: <https://www.cfr.org/in-brief/how-much-influence-does-iran-have-iraq>

198 The Washington Institute for Near East Policy (2022): The UN Resolution on Ukraine: How Did the Middle East Vote? Retrieved at: <https://www.washingtoninstitute.org/policy-analysis/un-resolution-ukraine-how-did-middle-east-vote>

199 Samuel Ramani (2022): What does Russia's war in Ukraine mean for Iraq? Middle East Institute, Retrieved at: <https://www.mei.edu/publications/what-does-russias-war-ukraine-mean-iraq>

200 Ibid.

201 Ibid.

in Ukraine despite close relations to Russia.²⁰² Particularly certain groups such as the Progressive Socialist Party, Hezbollah and the Lebanese Democratic Party did not agree with this positioning, underlining a more neutral position towards the conflict.²⁰³

Generally, Lebanese respondents did not reveal strong majority tendencies in response to most of the questions asked. However, 62% interpreted the Russia-Ukraine War as part of a global confrontation between Russia and the West. Political parties in Lebanon are generally divided between pro-Western sovereignists, who advocate a neutrality to the Russia-Ukraine War inspired by the Swiss model, and the supporters of the pro-Iranian resistance (Mumana'a) axis, who strongly oppose this.

Despite this split in state positionality, 45% of Lebanese respondents did regard their state's position regarding the war in Ukraine as neutral.²⁰⁴ Lebanon did officially condemn the Russian invasion of Ukraine in February 2022, and called on Moscow to immediately halt its military operations, withdraw its troops, and return to dialogue and negotiations as a means to resolve the conflict, according to a statement by the Foreign Ministry.²⁰⁵

Lebanese respondents said that the Russia-Ukraine War has impacted their day-to-day lives in terms of price increases. However, it should be noted that since 2019, Lebanon has been experiencing economic collapse and widespread political crisis, compounded by the horrific explosion at the Port of Beirut in August 2020. Therefore, it is difficult to assess what is attributed to the war in Ukraine and what to the Lebanese tragedy.

Respondents were fairly evenly split on whether they thought regional peace and security would get better, stay the same or deteriorate in the next five years. More thought that the safety of the region would improve in the aftermath of a US military withdrawal from the Middle East than those who thought it would deteriorate. 45% of Lebanese respondents also said they did not know which country in the MENA region benefits most from the war. However, 19% named Israel as the main beneficiary. This may be because of the ongoing conflict and potential for escalation with its Southern neighbor.

22% of Lebanese respondents felt Russia's involvement in the Middle East was beneficial to the people and countries in the region, while 37% thought it was harmful. Lebanese respondents showed little appetite for increased EU military presence

in the region if the US were to withdraw, with 18% saying they would support such a move and 46% saying they would not. Overall, Lebanon accommodates for a US- and Russia-friendly foreign policy approach thus its ambiguity with regards to blaming anyone directly.

Despite the current conflict between Russia and Ukraine, Lebanese survey respondents did not believe their government's position on the war was important for the economy, possibly because the economy had already collapsed. The constitutional vacuum prevailing in Lebanon at the time of the survey, with deep political crises hindering the formation of a government and the election of a new president, may have influenced this perception. Lebanon is consumed to a crucial extent by its own crises and respondents might be struggling to relate to events happening outside of their own realm.

EGYPT: DIVORCING A FORMER SOVIET ALLY AS THE HAND THAT FEEDS IT WITHDRAWS?

Egypt and Russia have a long-standing history of diplomatic and economic ties that dates back to the Soviet era. In recent years, the relationship between the two countries has grown stronger, particularly after Egypt's 2013 coup and military takeover. Notably, cooperation between Egypt and Russia has been concentrated in the military sphere²⁰⁶. Meanwhile, Egypt has also been the second-largest recipient of US military aid in the region after Israel. This has been the case since the 1979 Egypt-Israel Peace Treaty.²⁰⁷ The Egyptian military holds significant importance in the context of Egypt due to its historical role as a guarantor of stability and national security, which has helped maintain the country's domestic order. Additionally, the military plays a crucial role in Egypt's political landscape, exerting influence and holding key positions in the government, thereby shaping the country's political dynamics.

When Russia initiated the invasion of Ukraine, Egypt's policy was perceived as reluctant and ambiguous. Egypt called for dialogue between the two countries and urged them to find a political solution to the conflict through diplomacy. Egypt is the largest Arab country, demographically speaking, that decided to remain ambiguous over its Russia-Ukraine War position.

Egypt's concerns are primarily centered around the issue of food—specifically grain supply. Over a third of Egyptian respondents felt Russia's presence in the Middle East was harmful and 46% said that they did not know when the Russia-Ukraine War would end.

As explained by Middle East scholar, Khalil al-Anani, professor of political science at the Doha Institute for Graduate Studies, the impact of the war on Egypt's economy has been significant,

202 Salah Hijazi (2022): Beirut's official position on the Russian invasion is not unanimous, L'Orient Today, Retrieved at: <https://today.lorientlejour.com/article/1291885/beirut-official-position-on-the-russian-invasion-is-not-unanimous.html>

203 Ibid.

204 Data is representative of the societies surveyed, however the raw data does not allocate responses by sect.

205 Reuters. (2022): Lebanon condemns Russian invasion of Ukraine. Retrieved from <https://www.reuters.com/world/europe/lebanon-condemns-russian-invasion-ukraine-2022-02-24/>

206 Craig A. Daigle (2004): The Russians are going: Sadat, Nixon, and the Soviet presence in Egypt, Middle East Vol. 8, No. 1 pp.1-15.

207 Sharp, J. M. (2023, May 2). Egypt: Background and U.S. relations - federation of American scientists. <https://sgp.fas.org/crs/mideast/RL33003.pdf>

because it is the world's largest importer of wheat, most of which it imports from Russia and Ukraine.

Since the beginning of the war, food prices have risen considerably, with prices of essential commodities, like food, sunflower oil, and fuel skyrocketing. According to official figures, in 2020 Egypt imported around 12.9 million tons of wheat at a cost of \$3.2 billion. Since the beginning of the war, the price of a ton of wheat has almost doubled, from \$230 USD to \$450 USD.²⁰⁸

Russia was held responsible for starting the war by 43% of Egyptian respondents. 25% blamed the US, while 13% said Ukraine was responsible and another 13% said the EU. 34% said they did not know who benefits the most, while 26% said that they thought the US was benefiting the most from the current situation. 19% said they thought Russia was benefiting the most.

Egyptian respondents tended towards a globalist approach to the war, with 46% viewing it as one battle within a larger conflict between Russia and the West. There were no clear trends regarding the question of sanctions, and 61% of Egyptian respondents said they did not know whether they trusted the US or Russia more to do the right thing in the Middle East. Over a third of Egyptian respondents felt Russia's presence in the Middle East to be harmful and 46% said that they did not know when the Russia-Ukraine War will end.

MAGHREB: SOMEWHERE BETWEEN FOOD SECURITY AND HARD SECURITY

Until relatively recently, Morocco maintained a neutral stance towards the Russia-Ukraine War, abstaining from UNGA resolutions in March and April 2022. However, Morocco's Royal Court has recently taken a stand to adopt Ukraine's side.²⁰⁹ Ever since, Morocco has become the first country from Africa and Maghreb in particular to provide Ukraine with heavy arms, sending 20 overhauled main battle tanks.²¹⁰

In the Moroccan sample, 49% of respondents said they blame Russia for instigating the Russia-Ukraine War, but only 35% said they held Russia responsible for continuing it. 34% of respondents said the US was responsible for the continuation of the conflict, 19% blamed the EU, and 6% believed that Ukraine is most at fault in this regard.

For Moroccan respondents, continuation of this war is harmful to their own country. They felt it has led to an increase in grocery

prices and higher costs for energy. More respondents said that the kingdom takes a neutral stance on the war, and 43% thought that the position of their country regarding this war has an impact on their economy.

As for the global vision of the international order, respondents were divided, with 30% believing that our current world is multipolar, 25% believing that there is one superpower, but that other powers are catching up, while 19% thought that the world will remain unipolar indefinitely, no matter what. Ideally, 32% of Moroccan respondents said they would prefer a world without superpowers, while 26% wished for multipolarity, with many different superpowers that balance each other out.

A clear majority of 63% of Moroccan respondents said they were not sure whether they trusted the US or Russia more to do the right thing in the Middle East. Nevertheless, 49% of respondents judged Russian involvement in the Middle East negatively, compared to only 13% who judged it positively.

Among the three countries of the central Maghreb, **Tunisia** has the least room for maneuver regarding the war in Ukraine – largely due to its reliance on the country for important resource imports. Tunisia relied on Ukraine and Russia for 56% of its annual wheat imports between 2017 and 2022, leaving the country increasingly vulnerable.²¹¹ Prior to the start of the war, this reached 80% of grain imports, with 60% coming from Ukraine. In 2021, Tunisia imported 984 million tons of Ukrainian wheat and 111 million tons of Russian wheat. As a result of the war, Tunisia's food security has been compromised and its grain supply has become a challenge.

In 2022, the International Monetary Fund (IMF) reported that the Tunisian economy was already suffering from the economic impact of the Covid-19 pandemic, and the Ukraine war has only exacerbated that situation, leading to significant external economic shocks. Tunisia also relies on foreign oil producers such as Russia for almost half its fuel needs.²¹²

The Russia-Ukraine War has coincided with a worsening politico-economic crisis in Tunisia, where authoritarianism and the concentration of power around President Qaïs Saïd have increased, resulting in a crackdown on freedom of expression. Civil society is bravely mobilizing against this regression of Tunisia's political experience off the back of the success of the 2011 Arab Spring uprising. Due to the authoritarian tendencies of Saïd's regime, Tunisia is also at risk of losing US aid and assistance, which could worsen the economic situation further.²¹³

208 Khalil Al-Anani (2022): Russia's war on Ukraine: Egypt's limited room for maneuver. Retrieved at <https://arabcenterdc.org/resource/russias-war-on-ukraine-egypts-limited-room-for-maneuver/>

209 Pedro Canales (2022): Morocco abandons its neutrality in the Ukrainian war and aligns itself with the US, Atalayar: Between two shorts, Retrieved at: <https://atalayar.com/en/blog/morocco-abandons-its-neutrality-ukrainian-war-and-aligns-itself-us>

210 Jennifer Holleis (2023): Tanks to Ukraine mark change in Moroccan foreign policy, DW, Retrieved at: <https://www.dw.com/en/tanks-to-ukraine-mark-change-in-moroccan-foreign-policy/a-64527084>

211 David J. Lynch (2022): Tunisia among countries seeing major economic consequences from war in Ukraine, The Washington Post, Retrieved at: <https://www.washingtonpost.com/business/2022/04/14/ukraine-war-economic-impact-tunisia/>

212 Ibid.

213 Read more: <https://www.al-monitor.com/originals/2022/07/far-front-tunisia-suffers-because-ukraine-war#ixzz7vCM4v4uU>

Slightly more Tunisian respondents' held Russia primarily responsible for starting the Russia-Ukraine War, at 36% compared with 33% who blamed the US. A smaller percentage held Ukraine or the EU responsible. When it comes to responsibility for continuation of the war, 45% of Tunisian respondents said the US was responsible, with 17% blaming Europe and 10% attributing responsibility to Ukraine. In sum, 76% of Tunisians held countries other than Russia responsible for continuing the war which is very interesting as the blame is consistently not strongly placed on Russia for global disorder overall.

Generally, Tunisians are strongly opposed to any foreign military presence as seen in previous graphs. When it comes to US operations in the Middle East, 50% of Tunisian participants strongly supported and 20% somewhat supported removal of US military bases. Additionally, 42% of respondents believed that the region would become safer following withdrawal of US forces, and 44% felt that the relationship between countries in the region would improve. 64% opposed the idea of a larger EU military presence in the region if US bases were to be removed.

GENDER AND AGE ANALYSIS OF RESULTS

For the purpose of this analysis, data was disaggregated based on sex/gender and age. The findings derived from the data revealed some gender and age-specific patterns. In most surveyed countries, men (and, to a lesser extent, older men) were slightly more inclined to blame the US for the ongoing US-Ukraine war compared to women, except in Israel and Türkiye.

Across several countries, women were slightly more likely to express a preference for a world without superpowers, while men were more likely to accept a world with balancing superpowers.

According to the organizations conducting the data collection, there was a general trend of higher anti-US sentiment among men (on average 5% higher among surveyed men across the region), indicated by attributing fault to different countries for initiating and perpetuating the war in Ukraine, benefiting from the war, and contributing to regional instability.

Certain findings also revealed age-specific differences.²¹⁴ Except for Israel, Iran, and Türkiye, younger respondents were slightly more likely than older respondents (regardless of gender) to hold Russia responsible for the continuation of the war. In all surveyed countries, respondents in the oldest age group were more likely (by a margin of five to ten percent) to believe that the Russia-Ukraine war was negatively impacting their own country compared to respondents in the youngest age group. Younger

respondents were also somewhat more inclined to believe that Russia was benefiting from the war, while older generations were more likely to believe that the US was benefiting the most. Younger respondents showed relatively less hostility towards a greater EU military presence in the Middle East, although this was primarily driven by a higher percentage of "unsure" responses rather than expressing a positive view.

However, throughout the survey, the demographic differences based on age and gender were not substantial. For instance, there was considerable consensus across the sample that neither Russia nor the US were particularly trustworthy. Respondents generally perceived the Russia-Ukraine war as one battleground in a larger East-West struggle. In terms of key allies, respondents identified China and Iran as Russia's primary allies, and the US and the EU as Ukraine's main allies. Except in Israel, there was widespread disagreement regarding the moral acceptability of economic sanctions, and widespread agreement that reducing the US presence in the Middle East would enhance regional security. Concerning the consequences of the Russia-Ukraine war, respondents across countries, age groups, and genders expressed strong concerns about rising food and energy prices, while opinions regarding the spillover of violence to other countries were less unified.

SUMMARY

The Russia-Ukraine War has had a detrimental impact on already-conflict ridden countries in the MENA region, particularly on the vulnerable groups they host. As the war progresses through a second year, its impacts could be mitigated through active pursuit of alternatives for the resources that this war has made scarce in the region (and the rest of the world).

Survey respondents across the MENA region:

- 1. Viewed Russia as the primary instigator but the US as the primary beneficiary of the war;
- 2. Saw the war in Ukraine through the lens of larger Russia/West power struggles, and were unsure about whether to trust Russia or the US;
- 3. Were divided about the role, effectiveness, and morality of sanctions (but were not divided about who to blame for starting the war);
- 4. Tended to see their country as mostly neutral in the conflict, but saw negative effects of the war both in their state and their day-to-day life;
- 5. Tended to support the US withdrawing militarily from MENA, but were less convinced that this would make the region safer and improve regional relationships.

²¹⁴ For Egypt, Iraq, Israel, Jordan, Lebanon, Morocco, Saudi Arabia, Tunisia and Türkiye, the ages of respondents ranged from 18 to 85 and were grouped thus: 18-24, 25-34, 35-44 and 45 and older. For Iran, Qatar and UAE, the ages of respondents ranged from 18 to 78 years, arranged in age groups of 18-24, 25-30, 31-35, 36-40, 41-45, 46-50, 51-55, 56-60, 61-65 and over 65 years old.

According to the survey, respondents believed that Russia was mostly to blame for the conflict in Ukraine and primarily assigned responsibility for ongoing hostilities to the US, and less to Russia. In all surveyed countries, pluralities of respondents personally felt the effects of the Russia-Ukraine War, attesting to

more negative effects in ten out of twelve countries surveyed²¹⁵. Respondents most frequently experienced the effects of the Russia-Ukraine War through higher grocery prices, higher prices for energy and gas, and perceived insecurity due to conflict spillover.

In addition, respondents predominantly agreed that their country's position on this issue was important for their economy, while their biggest concerns were increased costs of living and innocent people being killed and injured in Ukraine. In six out of twelve countries surveyed²¹⁶, more respondents supported than opposed increases by EU member states in defense spending.

People from Ukraine are named most often by respondents as the ones suffering the most from the war, while the US was named most often as benefiting the most from it. A plurality of respondents from six out of twelve countries surveyed stated that US military withdrawal from the Middle East would improve relations between countries in the region²¹⁷ and most respondents said they would prefer to have either many superpowers balancing each other out, or no superpowers at all instead of a single dominant power.

If the Iranian sample is sufficiently representative of current Iranian society, the results are surprising. In a country that spent forty years under anti-US slogans, anti-Americanism appears to be less prevalent than in other surveyed countries, and discontent with the Russian role in the Middle East most prevalent. The level of solidarity of Iranians in this sample with Ukrainians is high. Türkiye, too, is pursuing a diversification of external relations, which is reflected in the results, despite not seeking to change its relations with Russia at large.

Russia's involvement in the Middle East was widely regarded as more harmful than beneficial to people and countries in the region. Finally, majorities in eight out of twelve countries surveyed stated that they were not sure whether to trust Russia or the US more in the Middle East.²¹⁸

However, it is necessary to qualify this a little. If the survey indicates the continued existence of an anti-US and anti-Western trend in the countries of the region, nothing in the results suggests that it is a sweeping trend. There is a sense, according to the overall survey results, that US power in the Middle East is declining, but that it remains the most influential foreign power there.

There is also an awareness that US power on a global level is declining, but it remains the superpower for now and there is no alternative capable of surpassing it in the foreseeable future. There is no sample that can be interpreted to be betting on Rus-

sia's resurgence to be a counterweight like the former Soviet Union. There is also not much belief in a rise of European power according to the survey data, with a lack of popularity for the idea among the samples surveyed.

POLICY AND FUTURE RESEARCH RECOMMENDATIONS

There remains an urgent need to explore alternatives to Russian and Ukrainian food exports. In order to respond to the impacts of the World Food Programme's (WFP) two main global wheat exporters being in conflict, and with Ukraine's export ban on many food items, other wheat producing countries such as the US and Canada could respond by increasing their contributions to WFP.

While the overall focus at the moment is on immediate humanitarian needs, larger implications at a global level continue to rapidly escalate as well. The conflict in Ukraine has first and foremost exposed the deep global reliance on fossil fuel.²¹⁹ Donor states should take this as an opportunity to support the diversification of energy sources and increase reliance on renewable energy for countries across the global south, and the MENA region more specifically.

Significant impacts of fuel shortages and price hikes will continue to be felt. A number of countries that remain especially vulnerable in terms of food security and fuel shortages since the beginning of the Russia-Ukraine War already have sanctions imposed on them by other states and international organizations. These include Syria, Sudan, and Yemen, where humanitarian needs persist or worsen.

Sanction-imposing countries must clarify to private financial institutions, importers, and insurance companies that grain imports are not liable to the international sanctions regime. In the long term, in order to reduce dependency on imported wheat, national focus across the region needs to be redirected into becoming more self-reliant.

Along broader lines, it remains the responsibility of donors to prioritize fully funding Humanitarian Response Plans (HRP) in the MENA in order to ensure that further deterioration in living conditions is avoided while advocating and negotiating with governments in the region to adequately allocate their finances and invest in their institutions and populations.

Additionally, donor governments must find ways to mitigate increases in food prices in order to prevent international humanitarian entities such as the WFP and other local NGOs and grassroots organizations from being forced to decrease food rations

215 Only in Qatar and the UAE, respondents indicated in majority that they felt neither positive nor negative effects of the war in their countries.

216 Iraq, Jordan, Lebanon, Israel, UAE, Qatar.

217 Morocco, Tunisia, Türkiye, Lebanon, Egypt, Jordan.

218 Saudi Arabia, Lebanon, Morocco, Iraq, Egypt, Jordan, Tunisia, Türkiye.

219 Fossil fuels provide a crucial source of income for Russia, amounting to 45% of its state budget in 2021: International Energy Agency (IEA) (2022),: Energy Fact Sheet: Why does Russian oil and gas matter?, Retrieved at: <https://www.iea.org/articles/energy-fact-sheet-why-does-russian-oil-and-gas-matter>

to already-vulnerable populations.

Last, but not least, the role of China will become more interesting in the years to come. A small minority of survey respondents expressed belief that China benefits from the Russia-Ukrainian-Western war and the wider Russia-West confrontation. But according to the data, there is not a significant percentage with this view. However, China's developing role in the MENA region is becoming more and more prevalent, and the recent mediation successes suggest that China is becoming a relevant foreign actor in the region politically.

ACKNOWLEDGEMENTS

This report is the result of a long substantive work process involving many months of joint discussion, collaborative analysis and exchange of knowledge. Special thanks therefore go to Dr. Jasmin Lilian Diab and Wissam Saade who contributed part of the analysis and provided in-depth expertise in the drafting of this report. Neither was involved in the drafting and conceptualization of the survey. Special thanks goes to the two Program Managers of the Regional Peace and Security Project of the Friedrich Ebert Foundation, Dilek Gürsel who coordinated the research and advised throughout the process, and Clemens Starke who supported the research and advised on the methodological soundness. Lastly, the Foundation also thanks graphic designer, Nour Abou Ismail, for his visualization of the data analysis and layout design.

GLOSSARY

Bipolarity Stemming from Neorealist thought in international relations scholarship, bipolarity is a structure in international politics in which two states are substantially more powerful than all others.²²⁰

MENA Abbreviation for the Middle East and North Africa region. Whereas countries ranging from Mauritania in the west towards Pakistan in the east are included at times,²²¹ this paper focuses on the following twelve countries representative of the MENA region, while a significant number of countries was excluded due to constraints set out in the methodology and limitations chapters: Egypt, Iraq, Israel, Iran, Jordan, Lebanon, Morocco, Qatar, Saudi Arabia, Tunisia, Türkiye and UAE.

Majority A value (in this case: in percentages) of one survey response which exceeds 50% of all responses given for that particular question.

Multipolarity Denotes a structure of international relations whereby more than two states are particularly powerful, following Neorealist thought.²²²

Neorealism Neorealism or Neorealist theory constitutes a theory of international relations which posits that international politics are shaped by the power struggle of independent states, primarily in military terms, to secure their survival in the absence of a higher power.²²³

Nonpolarity Following a Neorealist rationale, nonpolarity denotes a view on international politics “dominated not by one or two or even several states but rather by dozens of actors possessing and exercising various kinds of power.”²²⁴

Plurality An answer given by the largest number of respondents, but that does not reach absolute majority (over 50% of the total).

Positionality Comprises the views, opinions, resulting allegiances and alliances as well as decisions taken on a particular question, such as siding with one conflict party in the context of the Russia-Ukraine War.

Unipolarity Stemming from Neorealist thought in international relations, unipolarity constitutes a structure in international politics in which one state is more powerful than the others, and cannot be counterbalanced.²²⁵

West While linked to Western Europe and North America, the political West is not necessarily used as a geographical delimitation in this publication, but rather as a concept denoting countries which are linked by shared historical, cultural, societal, economic and political development and characteristics, such as an industrialized economy and liberal democracy.²²⁶

220 William C. Wohlforth (1999): The Stability of a Unipolar World. In: *International Security*, Vol. 24, No. 1, p. 9.

221 Cf. Sigrid Faath, Hanspeter Mattes (2014): Migration from the Middle East and North Africa to Europe: Past Developments, Current Status, and Future Potentials, p. 159.

222 William C. Wohlforth (1999): The Stability of a Unipolar World. In: *International Security*, Vol. 24, No. 1, p. 9.

223 John J. Mearsheimer (2010): Structural Realism. In: Tim Dunne, Milja Kurki, Steve Smith (eds.): *International Relations Theories. Discipline and Diversity*, 2nd ed. Oxford: Oxford University Press, pp.71-93.

224 Richard N. Haas (2008): The Age of Nonpolarity. What Will Follow U.S. Dominance. In: *Foreign Affairs*, May/June 2008. Retrieved at: <https://www.foreignaffairs.com/articles/united-states/2008-05-03/age-nonpolarity>

225 William C. Wohlforth (1999): The Stability of a Unipolar World. In: *International Security*, Vol. 24, No. 1, p. 9.

226 Benjamin Herborth and Gunther Hellmann (2017): Introduction. Uses of the West. In: Benjamin Herborth and Gunther Hellmann (eds.): *Uses of the West. Security and the Politics of Other*. Cambridge: Cambridge University Press, pp.1-10.

ANEX**GEOPOLITICAL SURVEY – YOUNG GOV QUESTIONNAIRE****i. Country**

- ☐ Egypt
- ☐ Iraq
- ☐ Israel
- ☐ Morocco
- ☐ Jordan
- ☐ Lebanon
- ☐ Saudi Arabia
- ☐ Tunisia
- ☐ Turkey

ii. Are you...?

- ☐ Male
- ☐ Female

iii. In what year were you born?

- ☐ ...

iv. In which region [in Egypt/Morocco/Lebanon/Saudi Arabia/Turkey/...] do you currently reside?

- ☐ ...

v. In which city do you currently reside?

- ☐ ...

vi. What nationality segment do you belong to?

- ☐ Emirati
- ☐ Saudi
- ☐ Arab Expat
- ☐ Asian Expat
- ☐ Westerner
- ☐ Other
- ☐ Iranian
- ☐ Not asked

1. Who do you consider mainly responsible for the war in Ukraine?

- ☐ Russia
- ☐ Ukraine
- ☐ The United States
- ☐ The European Union
- ☐ Another country

2. And generally speaking, which country or region is more at fault for the continuing conflict between Russia and Ukraine?

- ☐ Russia
- ☐ Ukraine
- ☐ The United States
- ☐ The European Union
- ☐ Another country

3. And even if it isn't exactly right, which of the following is closer to your view?

- ☐ The war between Russia and Ukraine is mostly between two nations fighting for power and territory
- ☐ The war between Russia and Ukraine is just one of many battlefields in a larger conflict between Russia and the West
- ☐ I don't know

4. Lately, some have talked about the use of "economic sanctions" when it comes to conflicts going on around the world. Sanctions may involve cutting off trade with another country, freezing the bank accounts of major figures within that country, or preventing that country from doing business in other places. Generally speaking, even if it isn't exactly right, which of the following is closer to your view?

- ☐ Economic sanctions are morally acceptable, and effective when it comes to pressuring governments to end conflicts
- ☐ Economic sanctions are morally unacceptable, even though they are effective in pressuring governments to end conflicts
- ☐ Economic sanctions are morally acceptable, but are not effective when it comes to pressuring governments to end conflicts
- ☐ Economic sanctions are morally unacceptable, and are not effective when it comes to pressuring governments to end conflicts
- ☐ I don't know

5. Many countries have imposed economic sanctions against Russia. Do you generally support or oppose using economic sanctions against Russia?

- ☐ Strongly support
- ☐ Somewhat support
- ☐ Somewhat oppose
- ☐ Strongly oppose
- ☐ Not sure

6. And generally speaking, when it comes to "economic sanctions," which of the following comes to your mind first?

- ☐ Freezing the bank accounts of certain individuals from that country, so that those individuals can't access or use those accounts
- ☐ Preventing ordinary trade with that country, such as by making it illegal to buy something from a business based in that country
- ☐ Preventing trade with that country only in some circumstances, such as by making it illegal to do business with the country's leaders
- ☐ Attempting to take wealth from that country to punish that country for its actions, such as demanding that country pay for the cost of a war it was involved in

7. Generally speaking, do you think your country is more [positively or negatively] affected by the war in Ukraine?

- ☐ Positively
- ☐ Negatively
- ☐ Neither nor

o I don't know

8. Do you personally feel the effects of the war between Russia and Ukraine in your country?

- o Yes
- o No
- o I don't know

9. And when it comes to the effects of the war between Russia and Ukraine in your country, which of the following would you say you experience frequently, such as in day to day life?

- o Higher prices for gas
- o Higher prices for energy besides gas, such as for my home heating bill
- o Higher grocery prices
- o More political conflict in my own country as people debate the war
- o Changes to my own feeling of safety because the conflict might spill over to other places

10. Which country do you think your country supports in this war?

- o Ukraine
- o Russia
- o My country stays neutral
- o I don't know

11. And when it comes to your country's position on this issue, would you say...

- o My country's position on this issue is important for our economy
- o My country's position on this issue does not have much impact on our economy
- o Not sure

12. And generally speaking, what is your biggest concerns with regard to the war in Ukraine?

- o Threat of the use of nuclear weapons in this war
- o Increased costs of living
- o Economic recession in my country because of the war
- o The war spreading to other countries
- o My country having to take in many refugees because of the war
- o My country having to choose a side in this war because of the demands of other countries
- o Innocent people being killed and injured in Ukraine
- o Other concerns

13. Generally speaking, who would you say is being harmed the most by the war in Ukraine?

- o Russia
- o Ukraine
- o The European Union
- o The United States
- o China
- o Other countries
- o I don't know

14. And generally speaking, who would you say is benefiting the most from the war in Ukraine?

- o Russia
- o Ukraine
- o The European Union
- o The United States
- o China
- o Other countries
- o I don't know

15. And generally speaking, which of these countries' governments and political leaders would you say is benefiting the most from the war in Ukraine?

- o Russia
- o Ukraine
- o The European Union
- o The United States
- o China
- o Other countries
- o I don't know

16. Many European countries, particularly Germany, have recently announced increases in their defense budgets. Generally speaking, do you [support or oppose] increasing defense spending in these countries? This means each country spends more of their government revenue and resources on their military.

- o Strongly support
- o Somewhat support
- o Somewhat oppose
- o Strongly oppose
- o Not sure

17. And even if it isn't exactly right, which of the following is closer to your view?

- o Right now, Europe can defend itself just fine with or without help from the United States
- o Europe needs the United States' help to defend itself right now, but Europe will be able to defend itself in the near future
- o Europe needs the United States' help to defend itself right now, and will continue to do so in the future
- o Not sure

18. When do you think the war in Ukraine will end?

- o By the end of this year
- o By the end of the year 2023
- o The war will end some time after that
- o Not sure

19. Lately, some in the United States have proposed withdrawing much of its military presence away from the Middle East. Generally, would you [support or oppose] the United States doing this?

- o Strongly support
- o Somewhat support
- o Somewhat oppose
- o Strongly oppose

- o Not sure

20. And if the United States were to withdraw much of its military presence away from the Middle East, would this make the Middle East, [more safe or less safe], make no difference, or are you unsure?

- o More safe
- o Less safe
- o Neither more nor less safe
- o Don't know

21. And if the United States were to withdraw much of its military presence away from the Middle East, would you say...

- o Relations between countries in the Middle East would improve
- o Relations between countries would not change
- o Relations between countries in the Middle East would get worse
- o I don't know

22. And if the United States were to withdraw much of its military presence away from the Middle East, would you support generally having a larger military presence from European Union countries in the Middle East?

- o Yes
- o No
- o I don't know

23. Which of these countries would you say generally supports Ukraine?

- o Turkey
- o Iran
- o Saudi
- o United Arab Emirates
- o Israel
- o The United States
- o The European Union
- o Russia
- o Ukraine
- o China
- o Germany
- o France
- o The United Kingdom

24. Which of these countries would you say generally supports Russia?

- o Turkey
- o Iran
- o Saudi
- o United Arab Emirates
- o Israel
- o The United States
- o The European Union
- o Russia
- o Ukraine
- o China
- o Germany
- o France
- o The United Kingdom

25. Thinking about the next five years, do you expect that the situation regarding peace and security in the Middle East will...

- o Improve
- o Somewhat improve
- o Stay the same
- o Somewhat deteriorate
- o Deteriorate

26. And even if it isn't exactly right, which of the following is closer to your view?

- o Right now, one country in the world is far more powerful than the others and that country will remain dominant for the foreseeable future
- o Right now, one country in the world is far more powerful than the others, but other countries are quickly catching up in terms of power
- o Right now, there are many powerful countries out there and no one country is far more powerful than the others
- o Not sure

27. And even if it isn't exactly right, which of the following is closer to your view?

- o It would be better if there was one major superpower in the world that preserved order around the world
- o It would be better if there were many different superpowers that balanced each other out
- o It would be better if there were no superpowers, with every country doing what's best for its people
- o Not sure

28. Generally speaking, which country do you think benefits the most from the Russia/Ukraine conflict?

- o Turkey
- o Iran
- o Saudi Arabia
- o Israel
- o Egypt
- o United Arab Emirates
- o Another country
- o I don't know

29. Generally speaking, which of these countries would you like to visit?

- o Turkey
- o Iran
- o Saudi Arabia
- o Israel
- o Egypt
- o United Arab Emirates
- o Another country
- o I don't know

30. And when it comes to Russia's involvement in affairs in the Middle East, which of the following is closer to your view?

- o Russia's involvement in the Middle East is generally beneficial to people and countries in the region

- o Russia's involvement in the Middle East is generally harmful to people and countries in the region
- o Not sure

31. And when it comes to [Russia and the United States], which country do you trust more to do the right thing when it comes to their involvement in the Middle East?

- o Russia
- o The United States
- o Not sure

GEOPOLITICAL SURVEY – QUESTIONNAIRE COVERING IRAN, QATAR, UAE²²⁷

i. Country

- ☐ Iran
- ☐ Qatar
- ☐ United Arab Emirates

ii. Location

- ☐ Dubai
- ☐ Sharjah
- ☐ Abu Dhabi
- ☐ Ajman
- ☐ Fujairah

iii. Location

- ☐ Doha
- ☐ Rayyan
- ☐ Wakra
- ☐ Um Selal
- ☐ Al kor
- ☐ Al Wakrah

iv. Location

- ☐ Tehran
- ☐ Isfahan
- ☐ Mashhad
- ☐ Shiraz
- ☐ Babolsar

v. Gender

- ☐ Male
- ☐ Female

vi. Exact Age

- ☐ ...

vii. Age

- ☐ 18-24 yrs.
- ☐ 25-30 yrs.
- ☐ 31-35 yrs.
- ☐ 36-40 yrs.
- ☐ 41-45 yrs.
- ☐ 46-50 yrs.
- ☐ 51-55 yrs.
- ☐ 56-60 yrs.
- ☐ 61-65 yrs.
- ☐ More than 65 yrs.

1. Who do you consider mainly responsible for the war

in Ukraine?

- ☐ Russia
- ☐ The United States
- ☐ Ukraine
- ☐ The European Union

2. Generally speaking, which country or region is more at fault for the continuing conflict between Russia and Ukraine?

- ☐ Russia
- ☐ The United States
- ☐ The European Union
- ☐ Ukraine
- ☐ Another country

3. And even if it isn't exactly right, which of the following is closer to your view?

- ☐ The war between Russia and Ukraine is just one of many battlefields in a larger conflict between Russia and the West
- ☐ The war between Russia and Ukraine is mostly between two nations fighting for power and territory
- ☐ I don't know

4. Generally speaking, even if it isn't exactly right, which of the following is closer to your view?

- ☐ Economic sanctions are morally acceptable, but are not effective when it comes to pressuring governments to end conflicts
- ☐ Economic sanctions are morally unacceptable, even though they are effective in pressuring governments to end conflicts
- ☐ Economic sanctions are morally acceptable, and effective when it comes to pressuring governments to end conflicts
- ☐ Economic sanctions are morally unacceptable, and are not effective when it comes to pressuring governments to end conflicts
- ☐ I don't know

5. Do you generally support or oppose using economic sanctions against Russia?

- ☐ Somewhat oppose
- ☐ Somewhat support
- ☐ Strongly support
- ☐ Strongly oppose

6. And generally speaking, when it comes to 'economic sanctions', which of the following statements comes to your mind first?

- ☐ Preventing ordinary trade with that country, such as by making it illegal to buy something from a business based in that country
- ☐ Preventing trade with that country only in some circumstances, such as by making it illegal to do business with the country's leaders
- ☐ Freezing the bank accounts of certain individuals from that country, so that those individuals can't access or use those accounts
- ☐ Attempting to take wealth from that country to punish that country for its actions, such as demanding that country

²²⁷ A leading global market research firm; the company worked with partners in the different countries for data collection due to sensitivities and access; therefore, they are not named here.

pay for the cost of a war it was involved in

7. Generally speaking, do you think your country is more positively or negatively affected by the war in Ukraine?

- ☐ Neither positively nor negatively
- ☐ Negatively
- ☐ Positively
- ☐ I don't know

8. Do you personally feel the effects of the war between Russia and Ukraine in your country?

- ☐ Yes
- ☐ No
- ☐ I don't know

9. When it comes to the effects of the war between Russia and Ukraine in your country, which of the following would you say you experience frequently, such as in day-to-day life?

- ☐ Higher grocery prices
- ☐ More political conflict in my own country as people debate the war
- ☐ Higher prices for energy besides gas, such as for my home heating bill
- ☐ Changes to my own feeling of safety because the conflict might spill over to other places
- ☐ Higher prices for gas

10. Which country do you think your country supports in this war?

- ☐ Russia
- ☐ My country stays neutral
- ☐ I don't know
- ☐ Ukraine

11. When it comes to your country's position on this issue, would you say:

- ☐ My country's position on this issue is important for our economy
- ☐ My country's position on this issue does not have much impact on our economy
- ☐ Not sure

12. What are your biggest concerns with regard to the war in Ukraine?

- ☐ The war spreading to other countries
- ☐ Innocent people being killed and injured in Ukraine
- ☐ Increased costs of living
- ☐ Economic recession in my country because of the war
- ☐ Threat of the use of nuclear weapons in this war
- ☐ My country having to choose a side in this war because of the demands of other countries
- ☐ My country having to take in many refugees because of the war
- ☐ Other concerns

13. Generally speaking, who would you say is being harmed the most by the war in Ukraine?

- ☐ Ukraine
- ☐ The European Union
- ☐ Russia
- ☐ I don't know
- ☐ The United States
- ☐ Other countries

14. Generally speaking, who would you say is benefiting the most from the war in Ukraine?

- ☐ The United States
- ☐ I don't know
- ☐ Russia
- ☐ China
- ☐ The European Union
- ☐ Ukraine
- ☐ Other countries

15. Generally speaking, which of these countries' governments and political leaders would you say is benefiting the most from the war in Ukraine?

- ☐ The United States
- ☐ China
- ☐ Russia
- ☐ The European Union
- ☐ I don't know
- ☐ Ukraine
- ☐ Other countries

16. Generally speaking, do you support or oppose increasing defense spending in these countries?

- ☐ Strongly support
- ☐ Somewhat support
- ☐ Somewhat oppose
- ☐ Strongly oppose

17. Even if it isn't exactly right, which of the following is closer to your view?

- ☐ Europe needs the United States' help to defend itself right now, but Europe will be able to defend itself in the near future
- ☐ Right now, Europe can defend itself just fine with or without help from the United States
- ☐ Europe needs the United States' help to defend itself right now, and will continue to do so in the future
- ☐ Not sure

18. When do you think the war in Ukraine will end?

- ☐ The war will end some time after that
- ☐ By the end of the year 2023
- ☐ Not sure

19. Generally, would you support or oppose the United States doing this?

- ☐ Strongly support
- ☐ Somewhat support
- ☐ Somewhat oppose
- ☐ Strongly oppose

20. And if the United States were to withdraw much of

its military presence away from the Middle East, would this make the Middle East safe or less safe, make no difference, or are you unsure?

- ☐ Neither more nor less safe
- ☐ Less safe
- ☐ More safe
- ☐ Don't know

21. And if the United States were to withdraw much of its military presence away from the Middle East, would you say:

- ☐ Relations between countries would not change
- ☐ Relations between countries in the Middle East would get worse
- ☐ Relations between countries in the Middle East would improve
- ☐ I don't know

22. If the United States were to withdraw much of its military presence away from the Middle East, would you support generally having a large military presence from European Union countries in the Middle East?

- ☐ No
- ☐ Yes
- ☐ I don't know

23. Rate these countries/organizations on a scale from 0 to 10 (0 – “I hold a very negative view”, 10 – “I hold a very positive view”):

- ☐ A – USA
- ☐ B – The European Union
- ☐ C – Russia
- ☐ D – Ukraine
- ☐ E – China
- ☐ F – Germany
- ☐ G – France
- ☐ H – The United Kingdom

24. Which of these countries would you say generally supports Russia?

- ☐ China
- ☐ Iran
- ☐ Turkey
- ☐ Saudi Arabia
- ☐ UAE
- ☐ The United Kingdom
- ☐ France
- ☐ Israel
- ☐ Germany
- ☐ USA
- ☐ EU

25. Which of these countries would you say generally supports Ukraine?

- ☐ USA
- ☐ EU
- ☐ The United Kingdom
- ☐ Germany
- ☐ France

- ☐ Israel
- ☐ UAE
- ☐ Saudi Arabia
- ☐ Turkey
- ☐ China
- ☐ Russia
- ☐ Iran

26. Thinking about the next five years, do you expect that the situation regarding peace and security in the Middle East:

- ☐ Will improve
- ☐ Will somewhat improve
- ☐ Will stay the same
- ☐ Will somewhat deteriorate
- ☐ Will deteriorate

27. Generally speaking, for each of the following countries, please rate them on a scale from 0 to 10, where a zero means “This country almost never obeys international rules and laws” and a ten means “This country almost always abides by international law”:

- ☐ A – USA
- ☐ B – The European Union
- ☐ C – Russia
- ☐ D – Ukraine
- ☐ E – China
- ☐ F – Germany

28. And even if it isn't exactly right, which of the following is closer to your view?

- ☐ Right now, there are many powerful countries out there and no one country is far more powerful than the others
- ☐ Right now, one country in the world is far more powerful than the others, but other countries are quickly catching up in terms of power
- ☐ Right now, one country in the world is far more powerful than the others and that country will remain dominant for the foreseeable future
- ☐ Not sure

29. And even if it isn't exactly right, which of the following is closer to your view?

- ☐ It would be better if there were many different superpowers that balanced each other out
- ☐ It would be better if there were no superpowers, with every country doing what's best for its people
- ☐ It would be better if there was one major superpower in the world that preserved order around the world
- ☐ Not sure

30. Generally speaking, which country do you think benefits the most from the Russia/Ukraine conflict?

- ☐ I don't know
- ☐ USA
- ☐ China
- ☐ Russia
- ☐ Israel
- ☐ Saudi Arabia

- ☐ Iran
- ☐ Turkey
- ☐ United Arab Emirates
- ☐ European Union
- ☐ Egypt

- ☐ Not working for some other reason

xi. Gender

- ☐ Male
- ☐ Female

31. Generally speaking, which of these countries would you like to visit?

- ☐ Turkey
- ☐ Egypt
- ☐ United Arab Emirates
- ☐ Saudi Arabia
- ☐ Israel
- ☐ Iran
- ☐ United States
- ☐ Europe
- ☐ Canada
- ☐ Qatar
- ☐ Other Countries

xii. Age

- ☐ 18-24
- ☐ 25-30
- ☐ 31-40
- ☐ 41-50
- ☐ 51-60
- ☐ 61-65
- ☐ More than 65

xiii. Country

- ☐ Iran
- ☐ Qatar
- ☐ United Arab Emirates

32. When it comes to Russia's involvement in affairs in the Middle East, which of the following is close to your view?

- ☐ Russia's involvement in the Middle East is generally harmful to people and countries in the region
- ☐ Russia's involvement in the Middle East is generally beneficial to people and countries in the region
- ☐ Not sure

33. When it comes to Russia and the United States, which country do you trust more to do the right thing when it comes to their involvement in the Middle East?

- ☐ The United States
- ☐ Not Sure
- ☐ Russia

viii. What is your current marital status?

- ☐ Married
- ☐ Single, never married
- ☐ Divorced or separated
- ☐ Widowed

ix. Which of the following best describes the highest level of education you have completed?

- ☐ University education
- ☐ Secondary education
- ☐ Technical education
- ☐ Postgraduate studies (e.g., Master's degree, Doctorate,...)
- ☐ Primary education

x. Which of these best describes your current employment situation?

- ☐ Working full-time
- ☐ Working – self-employed
- ☐ Looking after home/family
- ☐ Not working and seeking a job
- ☐ Retired
- ☐ Student
- ☐ Working part-time

ABOUT THE CONTRIBUTORS

Jasmin Lilian Diab is the Director of the Institute for Migration Studies, School Arts of Sciences and Assistant Professor and Coordinator of Migration Studies, Department of Social and Education Sciences at the Lebanese American University.

Dilek Gürsel works as Program Manager for the Regional Project on Peace and Security in the MENA Region.

Wissam Saade is a lecturer at the Institute of Political Science at Saint Joseph University in Beirut and publishes in leading Arabic newspapers.

Clemens Starke works as Program Manager for the Regional Project on Peace and Security in the MENA Region.

Imprint

Published by:
Friedrich-Ebert-Stiftung Project on Peace and Security in the
MENA Region

20 Stasandrou, Apt. 401
1060 Nicosia
Cyprus
Email: **peace.mena@fes.de**

Responsible for content and editing:
Marcus Schneider | Director | Project on Peace and Security in
the MENA Region

Responsible Program Manager:
Dilek Gürsel | Regional Program Manager

Contact/Order: **peace.mena@fes.de**

Editor: Elizabeth Fitt
Design: Nour Abou Ismail

The views expressed in this publication are not necessarily those
of the Friedrich-Ebert-Stiftung (FES).
Commercial use of media published by the FES is not permitted
without the consent of the FES. Publications by the FES may not
be used for electioneering purposes.

©2023

ISBN 978-9925-8021-1-1



