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ARAB BAROMETER

Public Views of the U.S.-China Competition in MENA

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Executive Summary

Over the last decade, the global competition between the U.S. and China has been on the rise. China's increased global outlook, particularly through its Belt and Road Initiative (BRI), has led to a significantly greater economic engagement with countries across the Middle East and North Africa (MENA). At the same time, the U.S. continues its retrenchment from the region focusing on a broader pivot to Asia. How have these developments affected views toward both countries? Arab Barometer's wave seven, the largest public opinion survey of its kind across MENA since the time of COVID, provides insight into these questions.

Across MENA, China remains more popular than the U.S. Among the nine countries surveyed, only in Morocco is the U.S. more popular overall than China. In the remainder, China tends to be significantly more favored than the U.S.

Yet, this story may be gradually changing. When asked about closer economic ties between their country and the two global powers, in the majority of countries surveyed, citizens are significantly less likely to say they want stronger ties with China than they were in 2018-19. In no country is there an increased desire for stronger economic ties with China while in multiple cases there has been a 20-point shift against China. By comparison, in most countries the desire for closer economic ties with the U.S. has increased or remained unchanged over the same period. This outcome suggests that BRI may not be having the intended effects, with citizens now moving away from China overall.

In part, this may be due to the fact that the brand name of Chinese companies, a key actor in the Belt and Road Initiative model, are weaker than their Western counterparts. In no country surveyed is a Chinese company preferred to an American or German company for constructing an infrastructure project in their country. The basic brand name for China is cheap and of low quality, which may explain the weakening desire for closer economic relations with China overall.

Yet, the news is not all bad for China. Despite China's significantly higher level of trade with MENA, citizens across the region remain more concerned with the threat posed by U.S. economic power compared with Chinese economic power. Perhaps this is a legacy of the U.S.'s stronger economic position historically, but for now MENA citizens remain more worried about U.S. power than Chinese power.

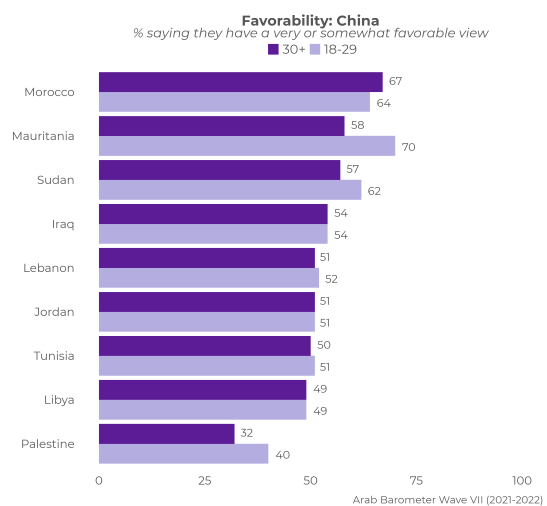
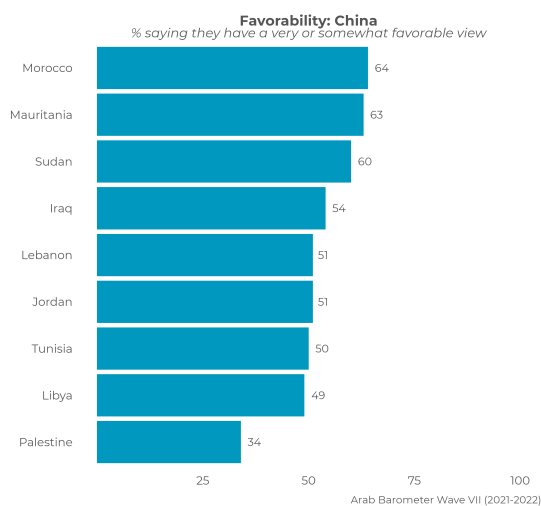
On political issues, both China and the U.S. have potential liabilities that could limit their overall support. For China, its treatment of Muslim minorities, particularly the Uyghur population in Xinjiang, might hurt its favorability across the

region. However, the survey results suggest that relatively few citizens in the region are monitoring this situation, suggesting it is not overly salient in structuring their views of China. Meanwhile, continued U.S. support for Israel, including the recent efforts at normalization with Arab countries, are widely rejected by those living in MENA, which likely hurts U.S. efforts to win hearts and minds of ordinary citizens across the region.

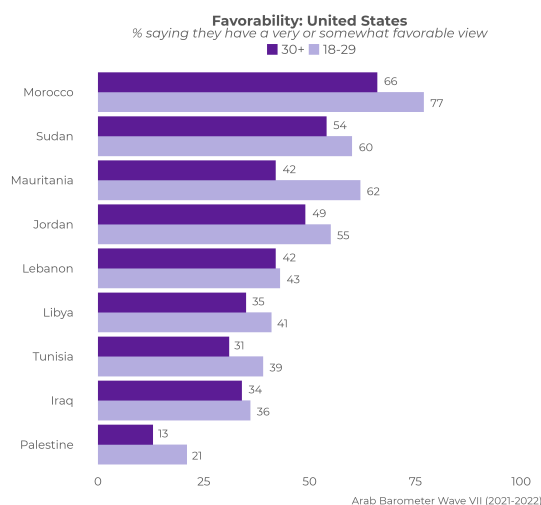
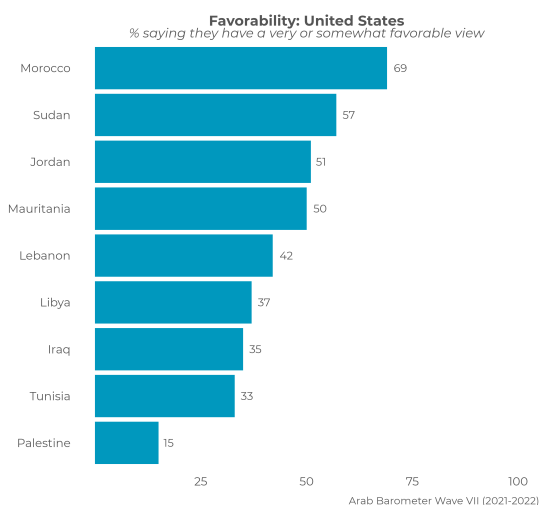
These are among the main findings of nine nationally representative public opinion surveys conducted across the Middle East and North Africa from 2021-22 as part of Arab Barometer Wave VII. The results include nearly 23,000 interviews across the region and have a margin of error of approximately 2 points in each country. Overall, these results make clear that the competition of the two main global powers is ongoing and while China may have the upperhand today, the broader trends suggest a likely decline in views of China in the coming decade.

Favorability of U.S. vs. China

Across the region, China tends to be viewed somewhat more favorably than the U.S. in the majority of countries surveyed. Roughly half or more say they have a very or somewhat favorable view of China in eight of the nine societies surveyed, including at least six-in-ten in Morocco (64 percent), Mauritania (63 percent), and Sudan (60 percent). Only in Palestine does a minority of citizens favor China (34 percent). Notably, youth ages 18-29 are not typically more open toward China than those who are 30 plus. Only in Mauritania (+12 points) and Palestine (+8 points) are youth substantially more likely to favor China.

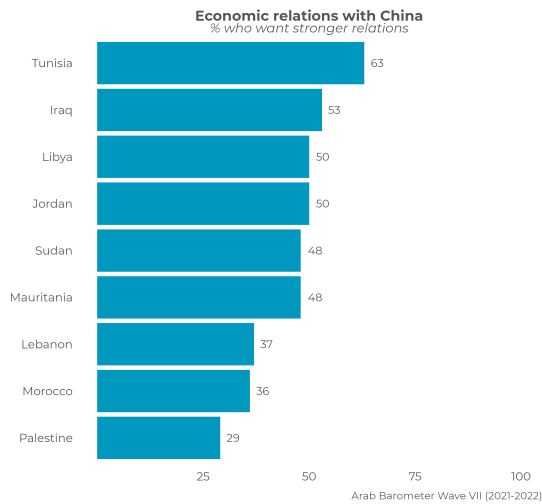


By comparison, only in four of nine countries surveyed do half or more have a positive view of the U.S., including 69 percent in Morocco, 57 percent in Sudan, and about half in Jordan (51 percent) and Mauritania (50 percent). However, only Palestine (15 percent) do fewer than one-in-three citizens have a favorable view of the U.S. Notably, youth are consistently more likely to say they have positive views of the U.S. than those who are older. For example, those ages 18-29 are more likely to favor the U.S. than those ages 30 and above in Mauritania (+20 points), Morocco (+11 points), Tunisia (+8 points), Palestine (+8 points), Sudan (+6 points), and Libya (+6 points).



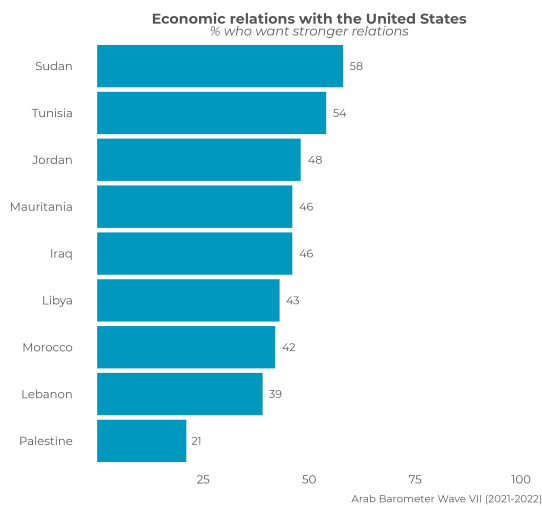
Although MENA citizens have a favorable view of China overall, they are somewhat less likely to say that they want stronger economic relations with the country. In only four of the nine countries surveyed do at least 50 percent prefer closer economic relations, with support being greatest in Tunisia (63 percent), Iraq (53 percent), and Jordan and Libya (50 percent, respectively). Moreover, in many countries this level represents a significant decline since Arab Barometer surveys conducted in 2018-19. For example, Jordanians and Palestinians are now 20 points less likely to favor closer economic ties with China, compared with a 14-point decline in Morocco and Sudan, a 13-point decline in Libya, and a five-point decline in Lebanon. Meanwhile, there was no meaningful change in Tunisia or Iraq.

Arab Barometer – Wave VII
US-China Report



Country	2018-19	2021-22	Difference
Jordan	70	50	-20
Palestine	49	29	-20
Sudan	62	48	-14
Morocco	49	36	-13
Libya	63	50	-13
Lebanon	42	37	-5
Tunisia	63	63	0
Iraq	51	53	2

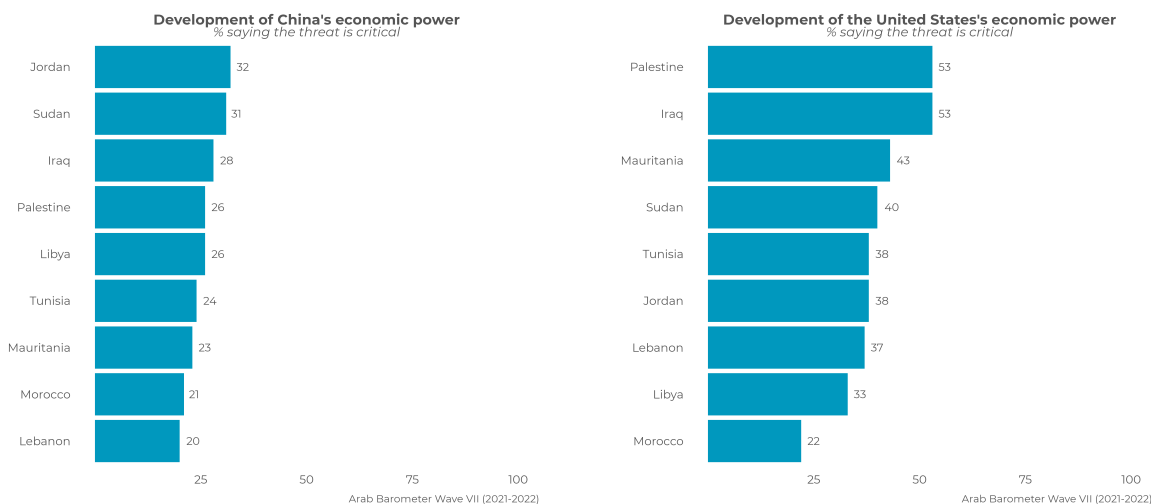
By comparison, in only two countries surveyed do at least half want closer economic relations with the U.S.—Sudan (58 percent) and Tunisia (54 percent). In most other cases, between four-in-ten and half want closer economic relations, with Palestine being the key exception (21 percent). Notably, again youth ages 18-29 across MENA are driving positive views toward the U.S.. Those in Morocco are 17 points more likely to want closer economic ties with the U.S., while youth in Mauritania (+9 points), Tunisia (+7 points), Libya (+5 points), Iraq (+5 points), and Jordan (+5 points) are also more likely to say the same compared with those who are 30 years and older.



Country	2018-19	2021-22	Difference
Palestine	31	21	-10
Jordan	57	48	-9
Sudan	60	58	-2
Morocco	43	42	-1
Lebanon	38	39	1
Libya	37	43	6
Tunisia	45	54	9
Iraq	35	46	11

However, unlike for China, support for closer economic relations with the U.S. has not experienced widespread decline across the region since 2018-19. Only in Palestine (-10 points) and Jordan (-9 points) have experienced meaningful declines. Meanwhile, in Iraq (+11 points), Tunisia (+9 points), and Libya (+6 points), publics are more likely to want closer economic ties with the U.S. while in Lebanon, Morocco, and Sudan there have not been significant changes during this period.

Despite the fact that Chinese trade with MENA far exceeds that of the U.S., citizens across MENA remain less likely to see Chinese economic expansion as a critical threat compared with the U.S. A third or fewer in all countries surveyed say that China’s economic power represents a critical threat, including just 21 percent in Morocco and 20 percent in Lebanon.



By comparison, concerns about the U.S.’s economic power are far greater. In eight of nine countries where the question was asked, at least a third say that the U.S.’s economic power represents a critical threat, including more than half in Iraq and Palestine (53 percent, respectively). Notably, in no country surveyed is China viewed as a more critical economic threat than the U.S.

Perceptions of U.S. assistance compared with Chinese assistance to MENA countries is revealing. In nearly all countries surveyed, the predominant reason for which citizens believe that each country provides aid is to gain influence over their country. In the case of the U.S., gaining influence is seen as the primary motivation in eight of nine countries surveyed, with at least four-in-ten holding this perception in these countries. The only exception is Morocco, where

just one-in-five says gaining influence is the main reason the U.S. provides aid. Meanwhile, in most countries the second most commonly perceived reason is to promote economic development, ranging from 24 percent in Morocco to 13 percent in Libya or to improve the lives of ordinary citizens, which ranges from 20 percent in Morocco to eight percent in Libya.

For China, the pattern is relatively similar. In the same eight of nine countries, gaining influence is seen as the predominant reason China provides aid, including at least a third in all countries other than Morocco (22 percent). As with the U.S., promoting economic development is typically seen as the second most common reason, ranging from 34 percent in Iraq and Lebanon to 18 percent in Sudan. Improving the lives of ordinary citizens is also cited by between 19 percent of citizens in Morocco and eight percent in Libya.

Despite these broad similarities, it appears that citizens in MENA are somewhat less suspicious of Chinese assistance compared with American assistance. Citizens in Iraq are 15 points more likely to say the motivation of the U.S. in providing aid is to gain influence compared with China. Similar gaps are found in Lebanon (12 points), Tunisia (10 points), Jordan (8 points), Libya (8 points), and Mauritania (7 points). For the most part, this gap can be explained by the difference in views of economic development being the main motivation for providing aid. Across the region, citizens are more likely to say this is the motivation for China providing aid compared with the U.S., including by 18 points in Iraq, 10 points in Lebanon, Libya, and Tunisia, 7 points in Jordan, and 6 points in Mauritania.

Economic Engagement

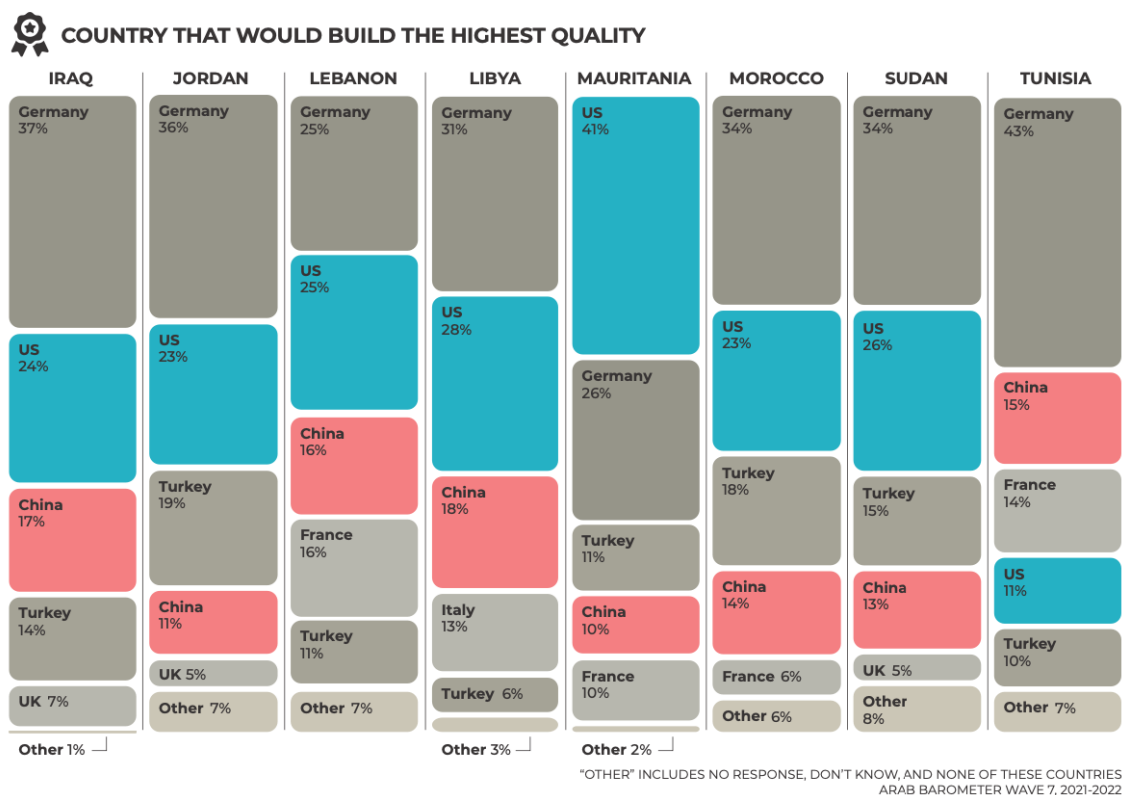
China's economic engagement across MENA has been increasing in recent years, especially as part of its Belt and Road Initiative. The majority of MENA countries have signed formal agreements¹ while others, like Jordan, are cooperating with the initiative.²

China's economic engagement is designed, in large part, to help win hearts and minds in favor of the country. By sponsoring projects designed to improve levels of economic development, China is trying to win hearts and minds to help ensure it retains a positive image in the years ahead. To further assess the degree to which this is likely to happen, Arab Barometer asked a number of questions designed to evaluate how citizens across MENA view 'China, Inc.'. The survey included a hypothetical question about an infrastructure project being bid out by

¹ See <https://greenfdc.org/countries-of-the-belt-and-road-initiative-bri/>

² <https://www.jordantimes.com/news/local/china-welcomes-jordans-active-participation-belt-and-road-initiative>

the government. The questionnaire asked about which foreign country's company would be most preferred for the contract as well as a number of more detailed perceptions about different dimensions including cost, quality, and corruption as it relates to the bid. The foreign countries included as options are China, the U.S., Germany, and Turkey, and the country's former colonial power.³

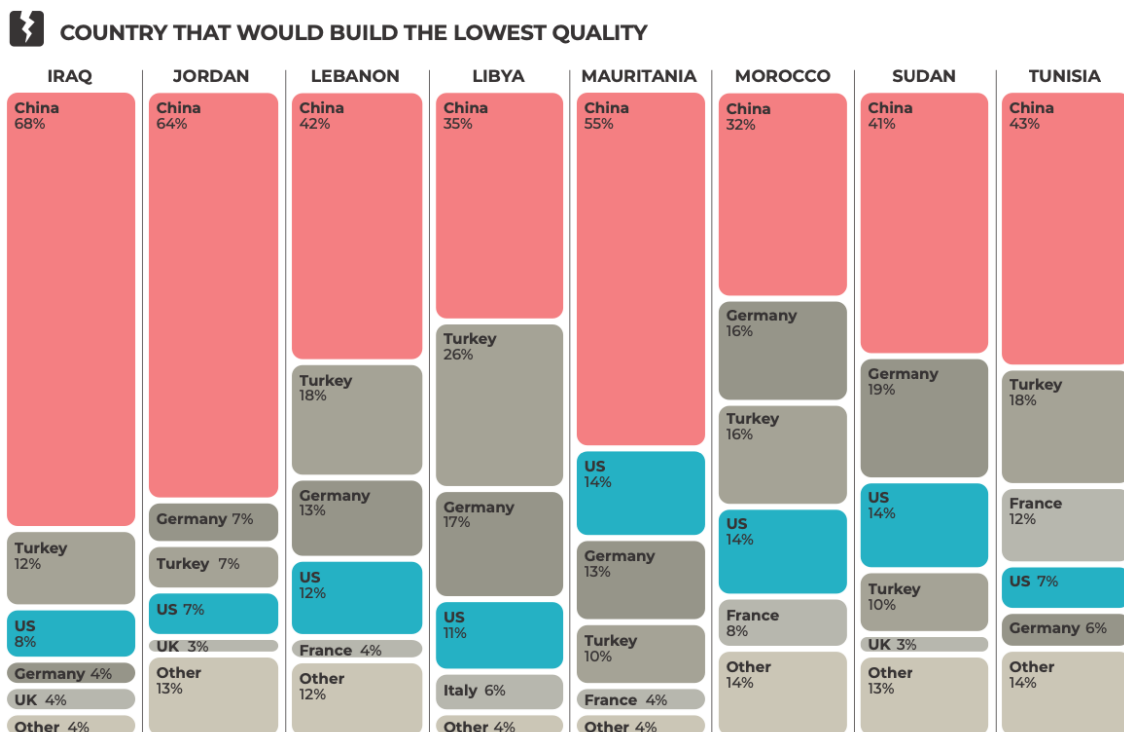


Perceptions of Chinese investment across MENA are not overly positive compared with companies from other countries on a number of measures. For example, when asked a company from which of these five countries would build the highest quality project, in no country did more than one-in-five name China. The percentage choosing China ranges from a high of 18 percent in Libya to just ten percent in Mauritania. By comparison, in seven of the eight countries where the question was asked, a German company is seen as having the reputation for the highest quality, while in two countries (in Lebanon the U.S. & Germany are tied at 25 percent) an American company is viewed as the highest quality.

The predominant view of Chinese investment is made even clearer by a question on the country of origin for the company that would build the lowest quality

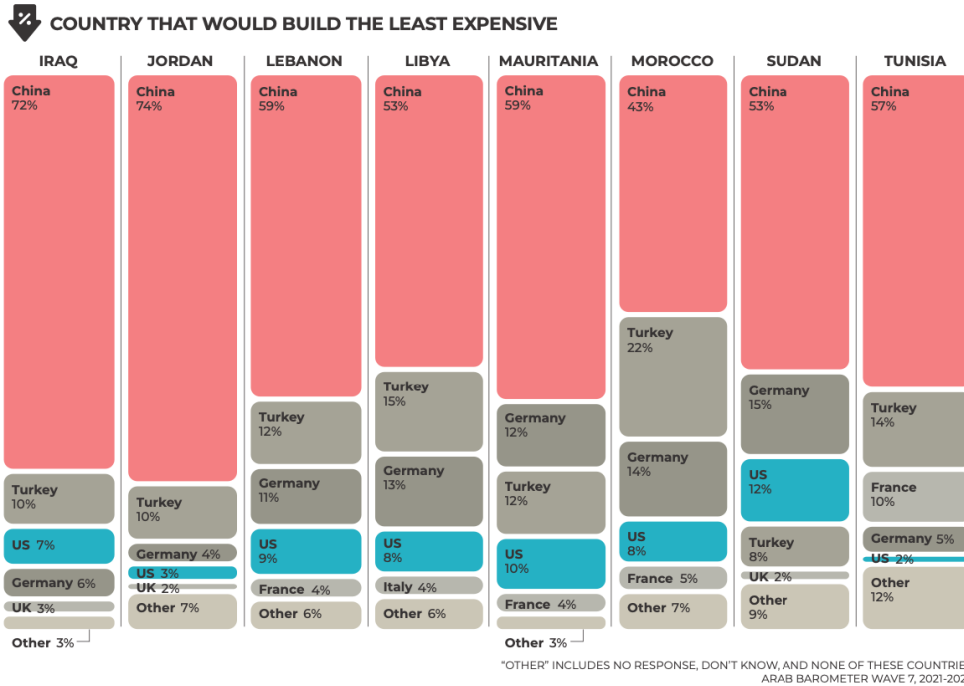
³The former colonial power was France in Lebanon, Mauritania, Morocco, and Tunisia. In Libya, Italy was included. In Iraq, Jordan and Sudan, the U.K was included.

project. In all eight countries surveyed, China was the most common response. In Iraq (68 percent) and Jordan (64 percent), roughly two thirds hold this view while more than half in Mauritania say the same (55 percent). In Morocco (32 percent) and Libya (35 percent), only about a third hold this view, but level is about twice as common for China as for any other country included in the list.

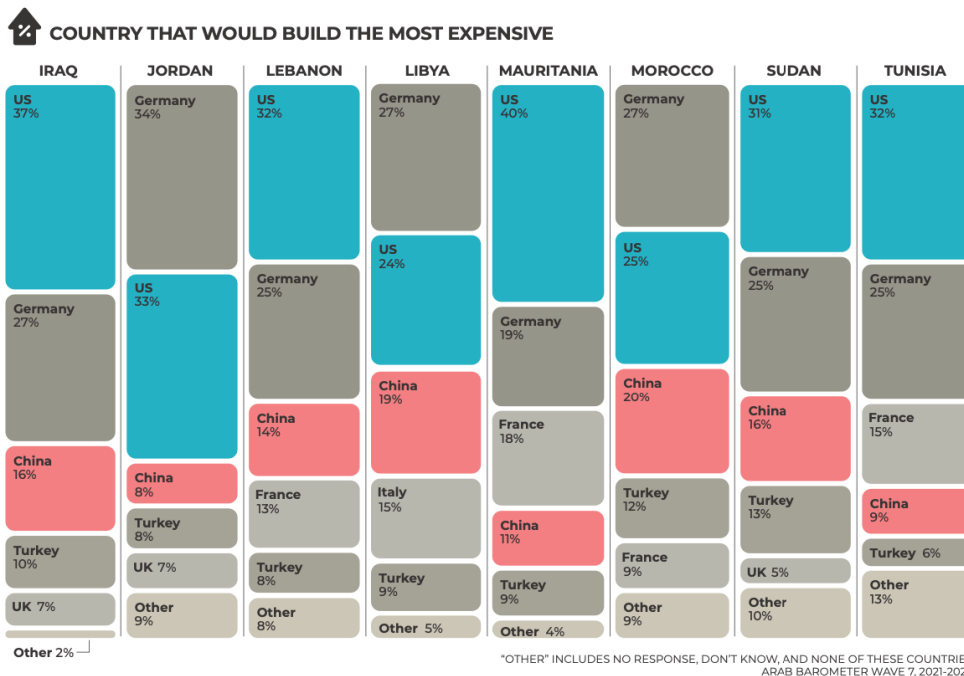


*"OTHER" INCLUDES NO RESPONSE, DON'T KNOW, AND NONE OF THESE COUNTRIES
ARAB BAROMETER WAVE 7, 2021-2022

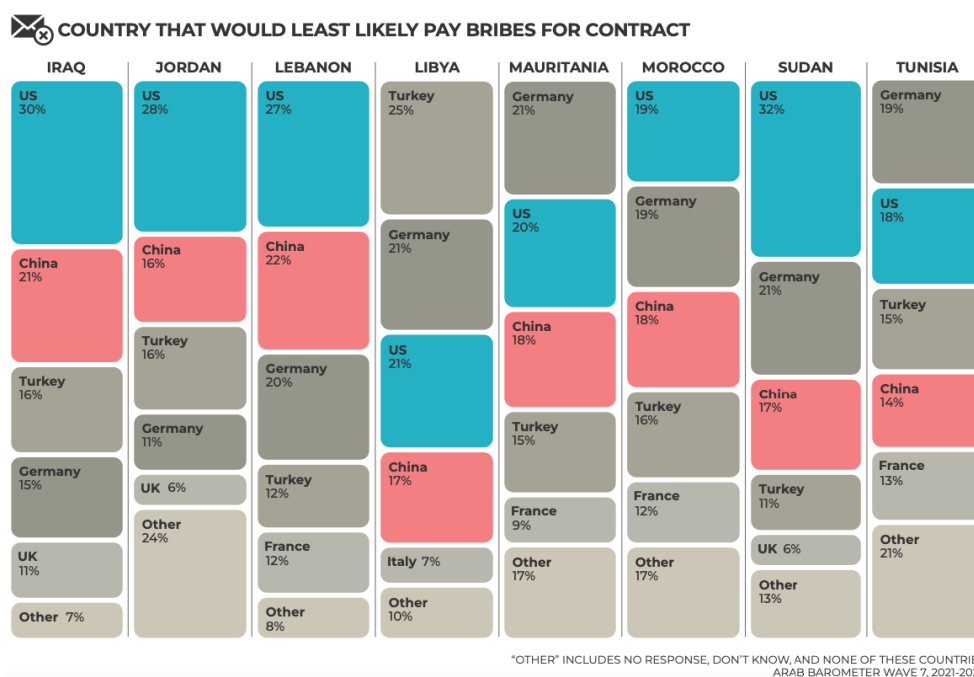
However, the trade off for higher quality often comes with higher cost. Citizens across MENA make clear that a Chinese company is most likely to build the project for the lowest cost. In all eight countries surveyed, a majority list China as the country of origin for the company that will build the most cost-efficient project, including more than seven-in-ten in Jordan (74 percent) and Iraq (72 percent). Among the eight countries, Moroccans (43 percent) are the least likely to say that a Chinese company will build the project for the smallest budget, but this is still about twice the level seen for Turkey (22 percent), which comes in second. In contrast, 15 percent or fewer choose the U.S. or Germany in all countries surveyed.



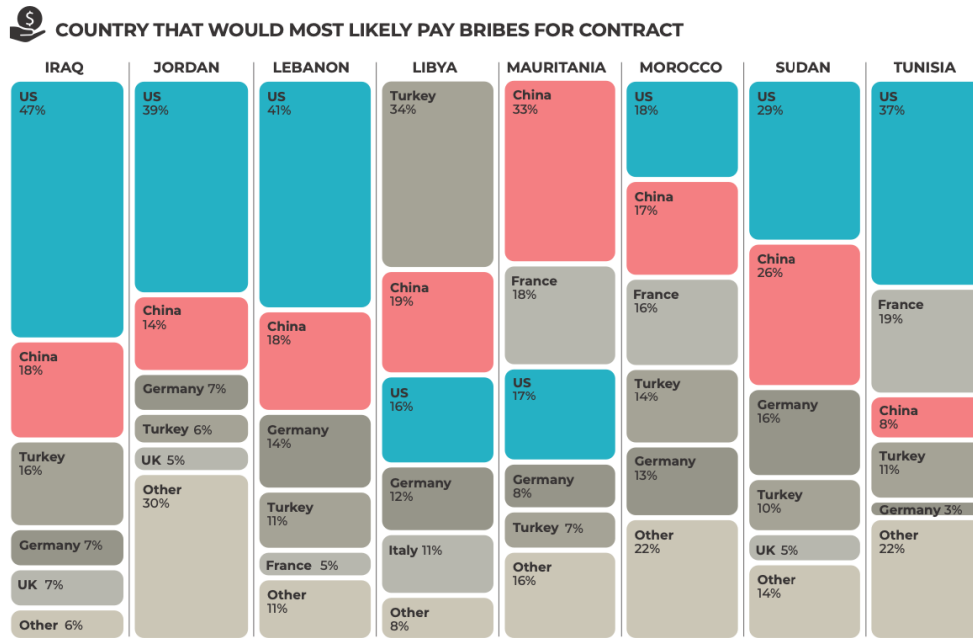
When asked about the country of origin for the company that would build the most expensive project, in all countries surveyed either the U.S. or Germany is the most common response. Meanwhile, no more than one-in-five say China in all countries surveyed, ranging from 19 percent in Libya to just eight percent in Jordan.



Given widespread and deep concern about corruption across the region, the degree to which a foreign country may use bribes to secure a contract is likely of significant concern to many citizens. When asked about the country of origin for the company that would be least likely to pay bribes as part of the process, the U.S. comes out ahead. In the majority of countries surveyed, an American company is viewed as the least likely to pay bribes to win the contract. In Mauritania, Morocco, and Tunisia, a German company is seen as one-point more likely to not pay bribes than an American company, while in Libya Turkey comes in first (25 percent). In no country is a Chinese company seen as the least likely to pay bribes, although the percentage varies between 22 percent in Lebanon to 14 percent in Tunisia.

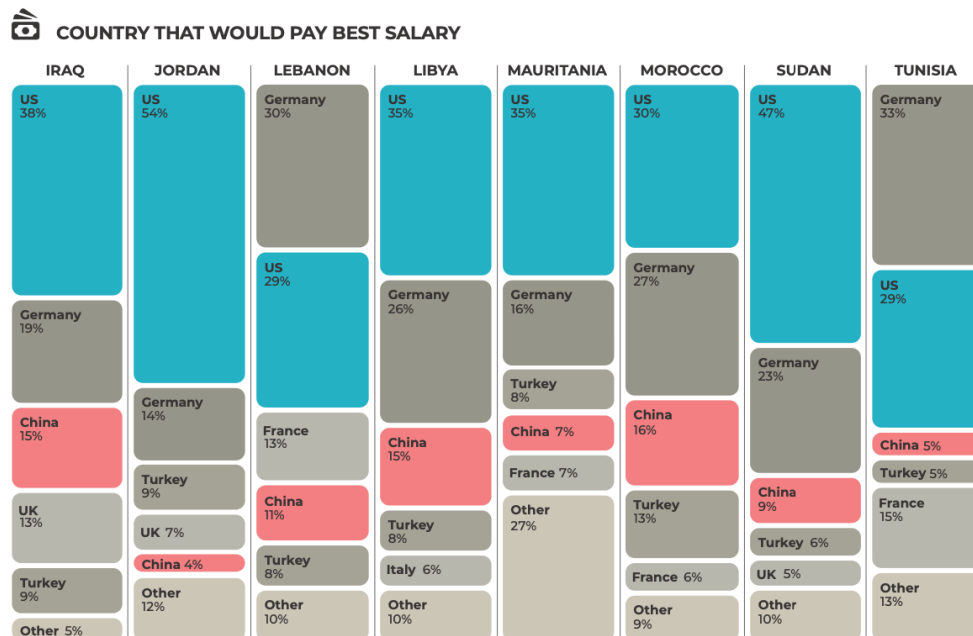


At the same time, a U.S.-based company is also viewed as the most likely to take bribes to secure a contract in six of eight countries surveyed. In fact, in Iraq, Jordan, and Lebanon, citizens are more than twice as likely to say a U.S. company will pay bribes compared with a company from any other country listed. In Libya, Turkey comes in first (34 percent), while China comes in first in Mauritania (33 percent) and Morocco (17 percent; same as the U.S.).



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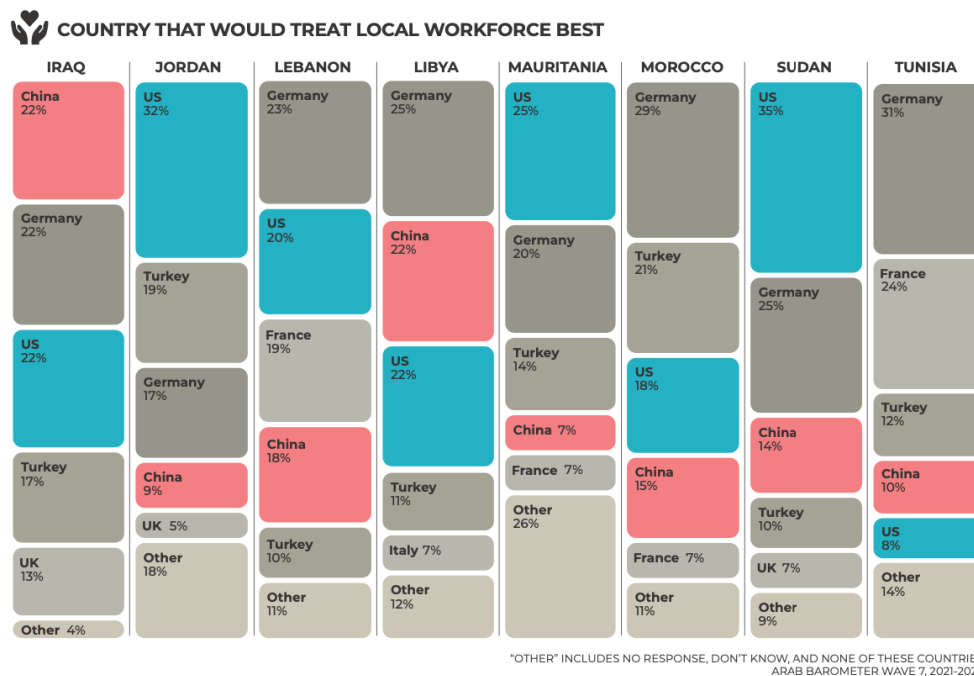
Another measure of economic engagement is the country of origin that would pay the best salaries to the local workforce. In this regard, a U.S.-based company comes out far ahead. In six of the eight countries surveyed, an American company is seen as paying the best salaries, ranging from a majority (54 percent) in Jordan to 29 percent in Lebanon and Tunisia.



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Elsewhere, a German company is viewed as the most likely to pay the best salaries in Tunisia (33 percent) and Lebanon (30 percent), which are slightly higher than for the U.S. Chinese companies are not seen as likely to pay good salaries, with at most 16 percent saying a Chinese company in Morocco compared to just five percent in Tunisia and four percent in Jordan.

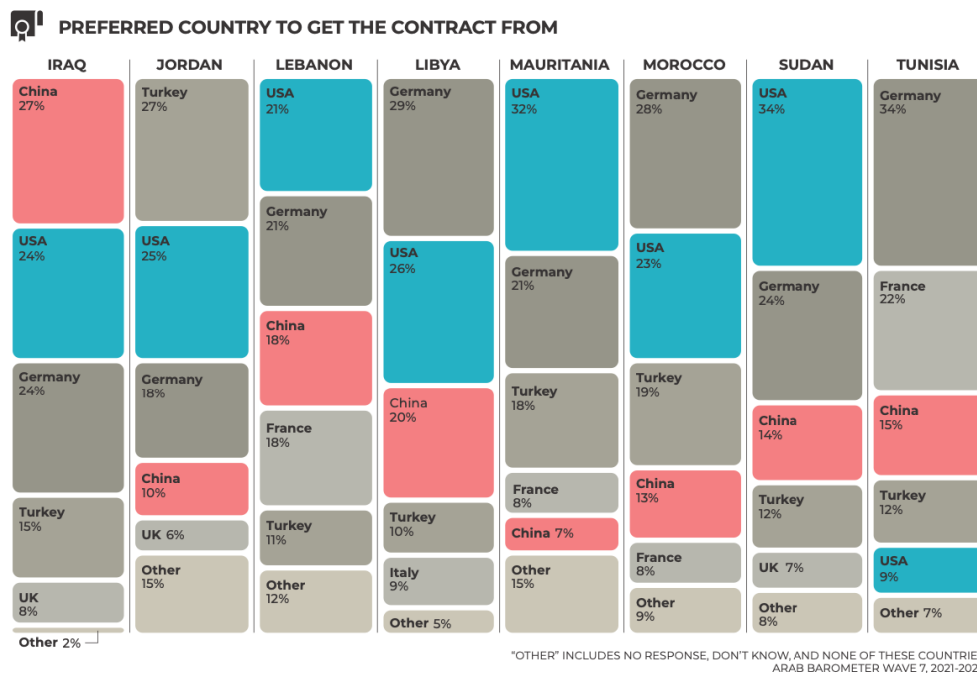
When asked more broadly about the country of origin for the company that would treat the local workforce the best, views across MENA are similar. In all countries surveyed, either a U.S. or German company is viewed as the most likely to treat the local workforce well.



However, perceptions of Chinese companies are a bit more positive by this measure. In Iraq, a company from China is tied with the U.S. and Germany (22 percent, each) for the most common response. Elsewhere, it ranges from 22 percent in Libya to seven percent in Mauritania.

Finally, the questionnaire asked about the country of origin for the company they would most prefer to get the contract. In most countries, the top choice is either a U.S. or German company. A German company is preferred in Libya, Morocco, and Tunisia while an American company is preferred in Mauritania, Sudan. In Lebanon, an American and German company are jointly tied for most favored. A Chinese company is only the top choice in one country—Iraq (27

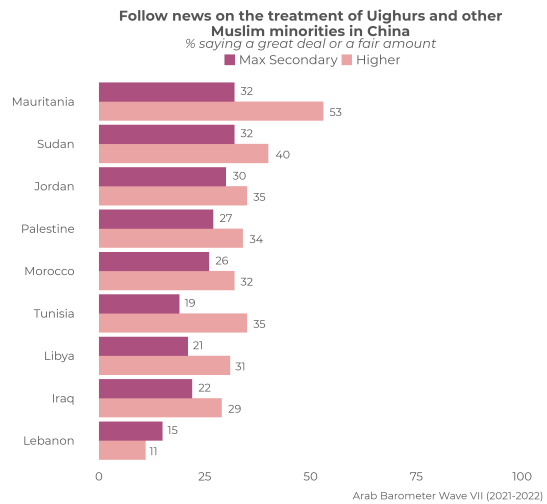
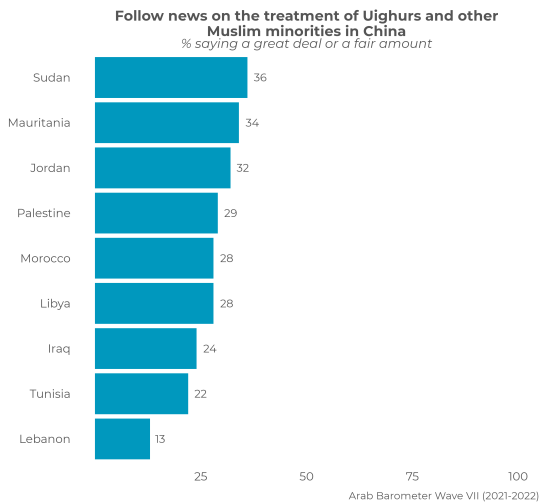
percent) while a Turkish company is preferred in Jordan (27 percent). Overall, there is not particularly strong support for a Chinese company outside of Iraq, which may be linked with significant Chinese investment in Iraq since the start of the pandemic.⁴ In all other countries, at most one-in-five would prefer the contract to go to a Chinese company, including just ten percent in Jordan and seven percent in Mauritania.



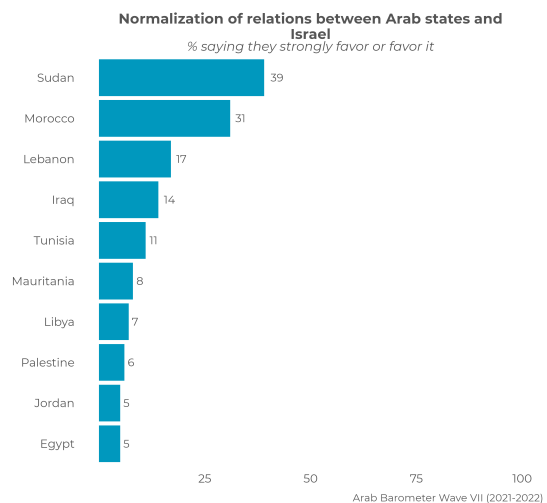
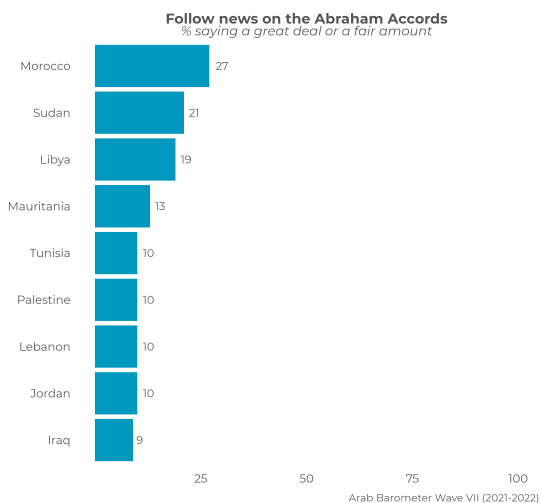
Political Issues

A number of political issues could also affect how both the U.S. and China are viewed across MENA. In the case of China, the harsh treatment of ethnic Uyghurs, a predominantly Muslim group in the province of Xinjiang in western China, could limit China’s overall popularity. However, relatively few citizens across MENA report following China’s treatment of Muslim minorities on the news, with at most 36 percent in Sudan saying they track this issue a great deal or fair amount. In all other countries, at most about a third say the same, including just 22 percent in Tunisia and 13 percent in Lebanon. Those with a college degree or above are significantly more likely to say they follow the news on China’s treatment of Muslim minorities in all countries except Lebanon, which is likely a function of those with higher levels of education being more likely to follow the news in general.

⁴<https://www.reuters.com/world/china/iraq-was-top-target-chinas-belt-road-2021-study-2022-02-02/>



Turning to the U.S., there is broad rejection among ordinary citizens across MENA of the U.S.-backed Abraham Accords and a broader peace deal with Israel. Although at most about a quarter of citizens in the region say they follow news on this issue a great deal or fair amount, including just one-in-ten in Tunisia, Palestine, Lebanon, Jordan, and Iraq, these peace agreements are widely rejected overall. In eight of the ten countries surveyed, fewer than one-in-five say they support normalization agreements with Israel, including fewer than one-in-ten in Mauritania (8 percent), Libya (7 percent), Palestine (6 percent), Jordan (5 percent), and Egypt (5 percent).



However, the two exceptions—Sudan and Morocco—are notable. In the former, 39 percent favor normalization with Israel compared with 31 percent in the latter. These two countries are part of the broader Abraham Accords, with Morocco having completed the normalization process with Israel while Sudan has initiated the process. In the case of Morocco, the U.S. recognized Moroccan sovereignty over Western Sahara simultaneously with normalization. In the case of Sudan, the U.S. committed to removing Sudan from the list of state sponsors of terrorism as part of the normalization process. As such, it is possible that the relative popularity of normalization in both countries is the result of citizens focusing on the strategic benefits that each agreement has brought to their country. But, judging by the broad rejection of normalization with Israel by Jordanians and Egyptians, whose governments made peace with Israel a generation ago, these relatively favorable views toward peace with Israel may fade over time.

Overall, in no country does even close to a majority of citizens favor normalization with Israel, which means the U.S. is strongly associated with a highly unpopular policy within MENA. This negative association is likely to continue hurting the popular image of the U.S. in the majority of countries across MENA.

Conclusions

The U.S.-China competition in MENA is likely to continue in the years ahead. As in previous surveys, China remains more popular than the U.S. overall, but this gap may be shrinking. China's focus on economic engagement does not appear to be winning hearts and minds. Citizens across the region are substantially less likely to want closer economic relations with China than they were in 2018-9, which may be the result of a cooling toward China's model for engaging MENA. Similarly, when asked their preferred foreign country of origin for a company conducting an infrastructure project, China is not preferred compared with a U.S. or German company. Yet, despite these declining preferences for China, overall, China remains somewhat more popular than the U.S.

In part, China's greater popularity could be due, at least in part, to the relative unpopularity of the U.S., its global rival. Although American companies are relatively favored by citizens in MENA, there remains concern about the U.S.'s economic power and rejection of some of its major policy initiatives toward MENA. Given that China is a non-colonial power that has not directly intervened militarily in MENA, it is likely to remain more popular than the U.S. in the near future. However, as China writes its own modern history with the region, current trends suggest its star may fade in the years to come.



ABOUT ARAB BAROMETER

Arab Barometer is a nonpartisan research network that provides insight into the social, political, and economic attitudes and values of ordinary citizens across the Arab world.

We have been conducting rigorous, and nationally representative public opinion surveys on probability samples of the adult populations across the Arab world since 2006 across 15 countries.

We are the longest-standing and the largest repository of publicly available data on the views of men and women in the MENA region. Our findings give a voice to the needs and concerns of Arab publics.



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