



TONY BLAIR
INSTITUTE
FOR GLOBAL
CHANGE

Think Again: Inside the Modernisation of the New Middle East

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Foreword

As this report from the Tony Blair Institute for Global Change makes clear, Western perceptions of the Arab world are too often shaped by negative stereotypes and anecdotal evidence used to justify prejudicial views – rather than by reality. As a result, our understanding of who Arabs are, and what values and aspirations they have, too often misses the mark.

Our policymakers and political analysts talk about Arabs and at Arabs, but they rarely consider listening to Arabs in order to fully understand their lives, and their needs and hopes for the future. One consequence of this has been the oversimplification of a complex region, which has led to costly policy disasters. In recognition of these failures and still hampered by attitudes shaped by negative perceptions, some voices in the West now argue for disengagement from the region.

Thankfully, the Tony Blair Institute has taken a different approach. Recognising that the Arab world sits at the pivot point of three continents in which we have invested so much, and that this is still a region of enormous human potential, the Institute believes that correcting course is the better option. And the path forward, as it proposes, is to replace myths and misconceptions with genuine understanding.

For this reason, we at Zogby Research Services (ZRS) were pleased to accept the Institute's offer to conduct polling across the Arab world to learn what Arabs, young and old, think about issues ranging from the role of religion in daily life to the advancement of women in the workplace – as well as the importance of prioritising opportunities for young people to learn the technological skills they need to be better equipped to participate in the 21st-century economy.

We have been polling on many of these issues for two decades now. For us, polling opens a window, allowing Arab voices to be heard. I call it “the respectful science” because we record the views of every respondent. When we analyse the results, a portrait emerges that can assist us in dispelling stereotypes and correcting misconceptions. And if we pay attention to what people are telling us, we can better shape our policies to respond, to meet their real needs, not the ones we have assumed they have.

In my 2010 book *Arab Voices: What They Are Saying to Us and Why It Matters*, I looked at what we learned from our polling about attitudes across the Arab world and compared them with the views that people in the West have of Arabs. At one point, I noted from our polling in the United States that there is a perception that Arabs hate us, despise our values, and spend too much time listening to preachers and television programmes that reinforce this hatred. Comparing those results with our polling from across the Arab world revealed a profound disconnect. We found that Arabs deeply respect the United

States and its values of freedom, innovation and opportunity. What they don't like are our policies towards them. Their political priorities are much like ours: secure employment, better educational opportunities and improving their health care. We also learned that mosque-attendance rates are comparable to church-attendance rates. And when Arabs watch television, their favorite programmes are films, soap operas, and reality and game shows – in other words, they watch it to be entertained.

Given that this has been our life's work, we're delighted the Institute has provided us with the opportunity to conduct new polling exploring the critical issues facing the Arab world today. It has undertaken to look deeply into Arab attitudes, to correct persistent stereotypes and to lay out a forward-looking agenda that responds to Arab aspirations. I recommend this report be read carefully and respectfully.

A final note to policymakers and political pundits: check your biases at the door and listen to what Arabs are telling us about what they want. As my mother used to tell me: "If you want others to hear you, you must listen to them first." Thanks to the Institute, Arab voices are speaking to you. Listen to what they're saying.

James Zogby

Managing Director, Zogby Research Services

Executive Summary

For the first time in his role as president of the United States, Joe Biden visits the Middle East this month. The global energy crisis created by Russia's invasion of Ukraine and a regional security alliance against the threat of Iran – one that is currently being crystallised – will be uppermost on his agenda. However, strained relations of late between the West and traditional allies in the region are bringing a central question into sharp focus. Does the West really understand today's Middle East?

The challenges facing the Middle East are widely known: ongoing conflicts to resolve in Libya, Syria and Yemen, recurrent eruptions of violence between Israel and the Palestinians, and escalating tensions over Iran's destabilising activities in the region. In all the countries of the Middle East, there is a need to preserve and advance human rights and freedom of expression, to tackle corruption and to confront the drivers of extremism. The region struggles to keep pace with fast-growing populations and to generate meaningful employment for the young and educated. Countries are also facing economic woes magnified by the post-pandemic downturn, an imminent food-security crisis, an overreliance on subsidised commodities and the dominance of the resource-extraction industry, namely oil and gas. Women in the Middle East remain underrepresented in politics and business, and face barriers fortified by religious and socially conservative norms.

In the face of and in response to these enduring challenges, however, the leadership of the Middle East and the majority of its people have remained resolute to make extraordinary progress on many fronts in recent years. But are these transformative changes being recognised in the West?

New polling for the Tony Blair Institute for Global Change conducted by YouGov suggests they are not. Our data reveal widely held misconceptions, outdated thinking and deep-seated pessimism about the Middle East among the public in Western countries.¹ Among those polled in France, Germany, the United Kingdom and the United States, people tend to view the Middle East as backward looking and conflict ridden, a region where progress is doubtful, and a place more likely to be a source of problems than solutions. While recent approaches in Western policymaking and supporting public statements convey a similar fatalism, these views do not reflect the reality of the Middle East today – or those of its people or leaders.

To understand this reality, the Tony Blair Institute commissioned polling by Zogby Research Services in April 2022 in countries across the Middle East – including Egypt, Iraq, Lebanon, Saudi Arabia and Tunisia.² The responses reveal very different perspectives about the region and its future. Bold reform agendas, such as Saudi Arabia's modernisation programme, designed to liberalise its social institutions and drive economic diversification, are widely supported by people across the region. An overwhelming majority are rejecting the ideology of politicised religious movements, instead favouring pragmatic

governments that can create more jobs for young people, reform religious institutions and enhance public services such as health and education.

Support for such initiatives is not surprising in the context of the region's changing values, with the vast majority of people wanting governments to protect rather than repress religious minorities, and to support equal opportunities for women, while acknowledging that most people's lives are no longer dominated by religion. With an eye on the future, many people in the Middle East want to see their youthful populations educated in the science, technology and innovation sectors, with a view to preparing them for the jobs of tomorrow.

Despite ongoing conflict and regressive forces opposed to progress, the Middle East – from Egypt to Morocco to Turkey – is nevertheless reforming through bold modernisation efforts in response to the demands of its pragmatic people and leaders. There do, however, need to be strong and committed international partners to back these transformative changes. In contrast to the reservation seen among Western publics and leaders about increased involvement in the Middle East, people in the region tend to view the West very favourably, as highlighted by our polling. To confront the widespread misconceptions about the region held by many in the West, the Tony Blair Institute tours today's Middle East to highlight 21st-century dynamism at its best – and to understand the region from the perspective of those who live and work there.

The New Middle East's Shared Vision for Change

On average, less than a quarter of those polled in Western countries believe that people in the Middle East share all or most of the same values as them, such as support for secular politics, and respect for difference and freedom of expression. Even fewer think it is a forward-looking region characterised by hope, instead associating the Middle East with intractable conflict and violent extremism. However, from the perspective of people who live there, the New Middle East is an altogether different place. An overwhelming majority support the Saudi modernisation programme and others like it that are reforming institutions, liberalising society and diversifying the economy. Equally, the majority are opposed to regressive religious movements and their role in politics. Other indications of this vision for change are:

- **Reforming zeal:** A new generation in the Middle East is demanding reform to religious institutions. More than two-thirds of youth want their religious institutions to modernise while people increasingly believe that religious leaders should not interfere in politics. Between 2011 and 2020, those in favour of the latter statement grew from 62 per cent to 78 per cent in Egypt and from 75 per cent to 80 per cent in Turkey. Even prior to this period, an increase in support for the separation of religion and politics had been recorded among Iraqis, from 54 per cent in 2004 to 69 per cent in 2011, and from 75 per cent in 2008 to 80 per cent in 2011 among the Lebanese.³

- **Mobilising for change:** Rather than waiting for politics to change, youth in the Middle East are demanding progressive change, with the region home to ten times more civil-society mass movements and protests than the rest of the world over the past 20 years. From the Arab uprisings in 2011 to the more recent “Tishreen” (“October”) movement in Iraq, these mass social movements have called for more inclusive and representative politics.
- **Optimistic outlook:** Changing values and the freedom to express them through popular politics are paving the way for a more optimistic and hopeful Middle East. According to the Arab Youth Survey, optimism is at its highest point in five years, with six-in-ten people aged between 18 and 24 believing their best days are ahead of them.⁴
- **Cultural creativity and expression:** A new generation is revitalising the Middle East’s rich artistic and cultural heritage, bolstered by a recognition from political leaders that economic growth is tied to creative expression. Rather than being a region devoid of creativity, the Middle East has long been home to busy literary and cultural events – Cairo International Book Fair, the largest of its kind in the world, was attended by 3.5 million visitors in 2020.

Sowing the Seeds of Growth in the New Middle East

Few people polled in the West regard the Middle East as the next Silicon Valley or East London, with only 12 per cent on average believing it is a major source of innovation. However, governments and an emerging generation of entrepreneurs in the Middle East think differently. Our polling shows that the science and innovation sectors are by far the most popular career trajectories for Middle Eastern youth and there is overwhelming support for young populations to learn new technological skills. Additional signs of this growth environment are:

- **Investment on the up:** Venture-capital funding in the region surpassed \$2 billion (\$2,578 million) in 2021, a figure that has tripled since 2017 (\$668 million).⁵ From Tunisia’s booming tech sector to Bahrain’s fintech hub, Middle Eastern leadership is supporting its talent to sow the seeds of growth.
- **Entrepreneurship runs deep:** More of the region’s youth want to become entrepreneurs, with 43 per cent of respondents to the Arab Youth Survey stating that they intend to start their own business within the next five years, compared with only 29 per cent in 2018. Interest in entrepreneurship is riding high in the Middle East and North Africa (MENA) region, with 97 per cent of Saudis, 78 per cent of Omanis and 74 per cent of Emiratis stating that “entrepreneurship is considered a good career choice” last year.⁶
- **Global appeal:** Inflows of foreign direct investment into the region jumped 50 per cent in 2021 alone, from \$60 billion to \$90 billion.⁷

Women Taking the Helm in the New Middle East

Only 12 per cent on average of those polled in Western countries think there has been an improvement in women's rights in the Middle East over recent years. This view contrasts starkly with people based in the region, with the vast majority of both women and men supporting women's rights. Despite the ongoing social and economic challenges faced by women, there is cause for optimism not least because some of the region's most dynamic and emerging popular and political leaders are women. Indications for this optimism are:

- **Bright minds:** Unprecedented investment in women's education is resulting in attainment that is equal to or better than in the West. UNESCO research has found that between 34 per cent and 57 per cent of science, technology, engineering and mathematics (STEM) graduates in Arab countries are women, much higher than in European or American universities.⁸ In 2019, Middle Eastern countries (41.5 per cent) scored higher than North America and Western Europe combined (32.7 per cent) in the percentage of female STEM researchers.⁹
- **A seat in the house:** While there is more momentum required to enhance female participation in public affairs, women in the Middle East are steadily changing the region's political landscape. Female representation in regional parliaments, for example, increased from 4.3 per cent in 1995 to 17.8 per cent in 2021.¹⁰
- **Starting up:** A significant 34 per cent of Middle Eastern tech startups have female founders.¹¹ One-in-three Middle Eastern startups is founded or led by women, a larger proportion than Silicon Valley.¹² Bahrain had one of the highest shares of female founders in the world at 18 per cent in 2019, above that seen in both London and Silicon Valley.¹³

Partnerships for Prosperity and Peace in the New Middle East

Nearly half the people polled in Western countries believe the Middle East is hostile or generally unfriendly towards their own country, which contrasts sharply with the sentiment among the public in the region itself. For example, 72 per cent polled in the Middle East view the United States favourably, with 67 per cent feeling the same about the United Kingdom. Most people in the West are deeply pessimistic about the possibility of peace in the Middle East, with 73 per cent of respondents in France, Germany, the UK and the US believing it is likely there will always be conflict in the region. In contrast, the vast majority of people in the Middle East support peaceful coexistence and want their governments to protect the rights of religious minorities.

Despite Western pessimism, the 2020s are proving to be a period of peaceful transformation in the Middle East. Countries without any history of diplomatic relations are partnering in agreements of

unprecedented cooperation to achieve positive change, and to advance peace between states and peoples, while regional leadership is convening global actors to address the climate-change crisis. Examples of these partnerships include:

- **Pioneering peace:** In August 2020, the world witnessed the century's most promising peace agreement when the Abraham Accords were signed. For the first time in its history, Israel established diplomatic relations with the United Arab Emirates (UAE) and Bahrain followed by Morocco and Sudan. Prosperity follows peace, with the accords set to create up to 4 million jobs and generate as much as \$1 trillion in economic activity.¹⁴ Knowledge-based collaboration is flourishing through agreements between universities while joint research on energy production and cooperation between major libraries are also thriving.
- **Removing blocks to prosperity:** The region is working towards greater economic collaboration to accelerate prosperity for all, for example by reducing outdated barriers to trade. Indeed, average uniform tariff rates (ad valorem and specific) fell from close to 15 per cent in 2002 to 5 per cent in 2011. Earlier this year, and on the back of the Abraham Accords, Israel and the UAE signed a historic free-trade agreement removing or reducing 96 per cent of goods tariffs.¹⁵
- **A global stage:** Cooperation is resulting in regional leadership tackling the world's greatest challenge as two back-to-back Conference of the Parties (COP) climate-change summits are held in Egypt (2022) and the UAE (2023). Resource-rich economies are looking to switch course on energy production, with Saudi Arabia aiming to generate 50 per cent of its electricity from clean sources by 2030, while the UAE is pursuing a 50 per cent renewable-energy target by 2050.¹⁶

Wide-ranging institutional, social and economic transformations, as considered in this report, are resulting in the most significant changes to the Middle East since the end of the post-colonial era. Our polling reveals widespread support for change across all countries, genders and age groups. In the past, regional leadership has been cautious about moving too quickly, concerned that regressive forces would attempt to turn back the clock. While radical Islamism continues to be a very real threat, the vast majority of the population are aligned with their leadership's reform initiatives. From women's rights to protecting religious minorities, modernisation is popular and leaders have the backing of their people.

For too long, people desiring change in the region have been trapped between two unappealing options: the status quo or the real possibility instead of Islamist government. Progressive-minded populations who led the Arab Spring protests and young leaders of mass movements in the region today are demanding a third way. More than a decade on from the Arab Spring, a consensus is forming that is underpinning change in the New Middle East. This is a coalition between more pluralistic and progressive populations and modernising and reforming leaders.

The time has come for the West to recognise the enormous institutional, social and economic transformations underway in the region. Many of these changes reflect the very same values the West espouses and has attempted to disseminate around the world. Yet the progress achieved to date is also

fragile and the region has witnessed how quickly opportunistic and regressive forces can undermine change. President Biden is right to visit the Middle East this month, but is the West prepared to support a third way for progressive change in the region?

The View From the Street in the New Middle East

Today's Middle East is a tale of two regions. On the one hand, it remains afflicted by decades of war and conflict that left nearly 35,000 dead between 2016 and 2020 alone.¹⁷ The region continues to grapple with the toxic, destabilising influence of Islamist extremism, which has spread throughout the world, resulting in tens of thousands of deaths globally over the past decade. It is more vulnerable to the climate crisis than many other regions while socioeconomic challenges continue to threaten social cohesion. However, there is another story unfolding that is often missed by conventional narratives fixated on these challenges. New polling demonstrates that people in the Middle East are moving on from old prejudices and perspectives while governments are taking transformative steps to respond to progressive values and demands for pragmatic change. Despite continuing instability in many parts of the region, governments are modernising with the widespread support of their people. But have views in the West caught up with this New Middle East?

As President Biden visits the Middle East, we also tour the region to canvass the views of its people and to reveal the transformational changes characterising a different Middle East from the one currently understood by many people in the West. Our research demonstrates that the dynamic institutional, social and economic transformations underway in the region are widely supported by the people there, yet these increasingly progressive steps are going largely unnoticed in the West. What is also often unrecognised outside the Middle East is the modernising approach that has been adopted by many of the region's leaders and its people in line with their changing values and priorities. This report argues that the reform agendas undertaken by many governments are fundamentally changing the Middle East, backed by widespread support of the people.

Since the 9/11 attacks, there has been considerable interest in polling people in the Middle East. Much emphasis has been placed on the changing values and demands of young people – who comprise increasingly large shares of national populations in the region – and whose priorities involve jobs and government reform rather than religion. Yet our polling suggests it is not just young people who are generally in line with these perspectives – across age groups, there is broad consensus on these priorities. Since the Arab Spring, much attention has been paid to the political and economic dissatisfaction felt by the youth demographic. Our polling suggests the wider public similarly identify corruption and the need for economic reforms as the principal grievances behind popular movements, including more recent demonstrations. While other surveys have focused on dissatisfaction with government, our polling suggests people in the region are still much more supportive of services provided by governments than religious institutions.

Polling in recent decades has revealed consistent support for democracy, but our most recent surveys indicate a need to disaggregate what the region is calling for when it comes to political reforms and types of government representation. What has been captured less is how the region's people are responding to transformational modernising agendas aimed at addressing the structural challenges driving dissatisfaction.

Saudi Arabia's **modernisation programme** (see Figure 1) is the most comprehensive, regionally driven transformation agenda since the post-colonial period. From liberalising the country's laws and policies to diversifying the economy, 73 per cent of people polled across the region support these transformative steps, including 89 per cent of Saudis themselves. Beyond Saudi Arabia, other government-led initiatives aimed at fundamentally reforming states and societies are underway. These agendas are making substantial progress towards reducing the influence of religious authorities, advancing the role of women and investing in innovation to align with changing values and priorities.

These reforms are popular. Our polling indicates people in the Middle East support these **far-reaching institutional transformations**. The majority of people do not want to rely on religious or international organisations to be responsible for providing services; instead 78 per cent of Tunisians, 68 per cent of Iraqis, 67 per cent of Lebanese and Saudis, and 55 per cent of Egyptians feel government is the most responsive on the delivery of fundamental services. Their priorities reflect a desire for improved government delivery, with health care and education among the top three issues of concern. Educational reform and the role of religion are important among almost everyone polled, with 77 per cent of Iraqis, 73 per cent of Saudis, 71 per cent of Tunisians and 65 per cent of Lebanese all agreeing their country's religious education and practices require reform.

What is clear is that people want secular and pragmatic government, not leadership bound to outdated and destructive Islamist ideologies. Today, an overwhelming 75 per cent agree that politicised religious movements are damaging for the region, with this figure higher in Saudi Arabia, standing at 80 per cent. Any "return" to mythological and so-called periods of Islamic purity is far from the main grievance occupying the people of the region. Instead, the most popular grievances in the Middle East are similar to those in the rest of the world, including corruption, nepotism and weak responses to people's economic and social needs.

Figure 1 – Understanding Saudi's National Transformation Programme

Saudi's National Transformation Programme is popular at home and abroad, with **73%** across the region in support and **89%** of Saudis in favour of the liberalisation and reforms. But what is it, and what's driving support for it?



WHY SHOULD THE WEST SUPPORT IT?

Saudis look to the US as their global partner of choice, despite decades of Western assumptions that anti-Americanism is on the rise. Saudi respondents gave their most favourable country ratings to China, the US and the UK, but they would most like their government to partner with the US (**66%**).

Vision 2030 sets out to fundamentally change the country. As the kingdom and its people make strides in transforming society and the economy, now is the time for the US and its allies to invest in the country's future.

Reducing the influence of religious authorities

Saudis are breaking from tradition. Only **38%** would describe themselves as "very religious" today and **12%** say it plays very little role in their day-to-day lives. Saudi Arabia's authorities, lawmakers and religious scholars have worked to modernise women's rights, the judicial system and censorship laws and to lift social restrictions, including gender-segregation rules. Saudi Arabia plans to open more than 300 cinemas by 2030 while a new tourist-visa scheme means the world can see change for itself.

Investing in innovation

Modernising and diversifying the economy is a high priority for Saudis, with science, technology and innovation (**60%**) and tourism (**44%**) the preferred sectors for prospective employment. More favour teaching children technological skills over religious education.

As part of its Vision 2030, Saudi Arabia aims to unlock the potential of non-oil sectors. In 2021, the kingdom saw a **54%** increase in startup funding deals compared to 2020. There are now over 300,000 jobs in the Saudi tech sector, with the country spending \$33bn on ITC last year. The Global Entrepreneurship Congress recently ranked the kingdom first out of 45 countries in which to start a business.

Advancing women's rights

By a margin of two-to-one, Saudis agree that women should have the same employment rights as men in both public and private sectors. Saudi's Vision 2030 sets out to increase female labour-force participation to over **30%** by 2030. Women's economic participation in the kingdom grew from **19.4%** in 2017 to **33.2%** in 2020 while their participation in the tech sector is higher than the European average.

Source: TBI/Zogby Research Services

More and more people in the Middle East expect their governments to foster **pluralistic and progressive societies**. While 73 per cent of people polled in the West think it is likely that the Middle East will always be at war with itself, the majority of people in the region – 78 per cent of those polled – believe it is important their governments protect the rights of citizens of all faiths. Western publics are also behind the curve when it comes to the generational transformation underway for women in the Middle East, with only 12 per cent of respondents polled saying there has been an improvement in women's rights in the region. Yet the growth of women in the workforce and leadership roles tells another story, as does the consensus in the Middle East – on average, 70 per cent of people polled believe women should have the same rights as men to work in business and government. Alongside jobs and better services, advancing women's rights is a top priority for the region. Furthermore, in contrast to the doctrinal purity demanded by Islamist extremists, religion is no longer a driving force in the daily lives of people: 82 per cent of Egyptians, 81 per cent of Lebanese, 77 per cent of Tunisians, 67 per cent of Iraqis and 62 per cent of Saudis consider themselves only moderately religious or not religious at all.

Economic growth and the creation of jobs for the world's youngest population by region are at the heart of modernisation agendas, as is diversification of the Middle East's previously resource-dependent economies and civil service-dominated employment sectors. In every country polled in the region, creating more jobs is the number-one concern among people, including in Saudi Arabia where creating jobs is at least twice as important as any other issue. Despite this, the acceleration of innovative growth sectors is not acknowledged beyond the region and certainly not in the West, where only 12 per cent on average of those polled regard the Middle East as a major source of innovation. The people of the Middle East are entirely behind their governments' efforts to unleash entrepreneurship and innovation, and they see science, technology and innovation as sectors in which young people should aspire to work, this figure standing at 69 per cent on average compared to only 9 per cent for the civil service. When it comes to education and preparing for the jobs of the future, people across the region overwhelmingly support young people learning technological skills, including 94 per cent of Tunisians, 85 per cent of Saudis, 78 per cent of Egyptians and Iraqis, and 74 per cent of Lebanese.

These transformational agendas are attracting the backing of the people.

As President Biden arrives in the region, what is less clear is **whether the West can be counted on as a partner** at this critical time. Countries in the region are cooperating in ways not seen before for a more peaceful and prosperous Middle East, in opposition to Islamist authoritarianism and the Islamic Republic's destabilisation. Burgeoning entrepreneurship and greater economic integration are turning the Middle East into a critical growth region for international trade partnerships. And the region's people are more invested in the pluralistic and progressive values also espoused in the West. Despite this fast-evolving landscape, 46 per cent of those polled in the West believe the Middle East is generally unfriendly or even hostile towards Western countries, with nearly a quarter thinking the West should have less involvement in the region. These views do not stack up in the reverse, however, with Saudis (79 per cent), Egyptians

(75 per cent), Lebanese (73 per cent), Tunisians (71 per cent) and Iraqis (64 per cent) having a favourable view of the US, while a similar sentiment for the UK is noted among Iraqis (76 per cent), Saudis and Egyptians (73 per cent), Lebanese (67 per cent) and Tunisians (48 per cent). Far fewer view the likes of Russia and Iran positively.

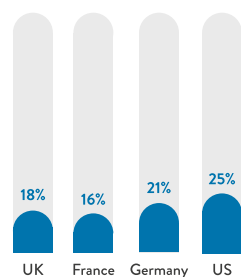
The region and its people are united in their desire for change and for a more peaceful and prosperous Middle East. Given the outdated views still held by the public in the West, will President Biden and other global leaders take steps to counter these misconceptions and intensify their support for the region's modernisation?

The New Middle East's Shared Vision for Change

Figure 2 – Polling in Western countries and in the Middle East reveal a disconnect on values and liberalising reforms

PERCEPTION: RESISTANCE TO MODERNISATION

On average, only **20%** of people in the West say they share the same values as people in the Middle East



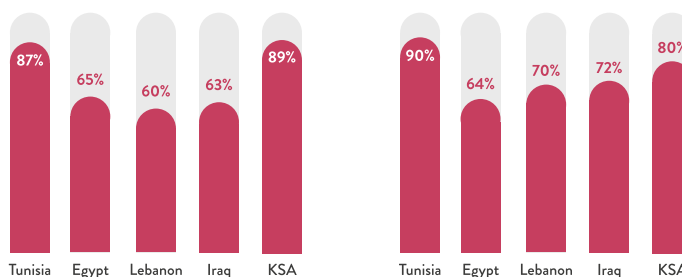
WESTERN POLLING BY YOUNG

Original question

To what extent do you think people in the Middle East share the same values as people in countries like yours?

REALITY: WIDESPREAD SUPPORT FOR LIBERALISING REFORMS

Across the Middle East, **73%** on average support Saudi Arabia's liberalising modernisation programme while **75%** believe politicised religious movements have a negative impact



MIDDLE EAST POLLING BY ZOGBY

Original question

Saudi Arabia is engaged in a programme to liberalise the country, allowing for greater social freedom and limiting the role of the religious police in the country. Do you **support** or **oppose** this programme?

Original question

When politicised religious movements and their supporters have taken power in the Middle East, in general have they had a **negative** or **positive** impact?

For most people in the West, the question of values is one that divides them from the people of the Middle East. Indeed, our polling reveals that only 20 per cent of those polled in Western countries feel that people in the Middle East share all or most of the same core values as them, whether a preference for secular and representative politics, or respect for difference and freedom of expression. While these are cornerstones of liberal democracies, people in the West are not unique in espousing them. Widespread support for modernising programmes suggests there is much more alignment on values than is perceived by people in the West.

Our Middle East polling shows that 73 per cent of people across the region support social reforms, such as the modernising ones underway in Saudi Arabia to liberalise society, increase women's agency and reduce the role of religious authorities. In addition, large majorities in the Middle East have indicated a preference for modernising governments, with 75 per cent of those polled saying that politicised religious movements had a negative impact when they took power. Alongside significant investments in arts and culture as championed by modernising leaders, the overall effect is the opposite of what has been experienced when Islamists have taken power.

It is only possible to understand the Arab Spring and other popular movements when there is a recognition of the increasing numbers of people in the Middle East who share similar values to those in the West.

Liberalising Populations Hungry for Change

The Saudi National Transformation Programme and other regional initiatives are seeking to meet the desires and needs of changing populations in the Middle East, including young people, resulting in an evolution of the region's traditional characteristics. There are an estimated 146 million people between the ages of 15 and 34, representing 34 per cent of the region's total population.¹⁸ It is to be expected then that the outlooks of young people are already shaping the values of the New Middle East.

According to Arab Barometer, growing numbers of people aged between 18 and 24 are describing themselves as “not religious”, including nearly half of young Tunisians and a third of young Libyans in 2019.¹⁹ Of course, religious outlooks vary across the region, as shown by the 2021 Arab Youth Survey, with young people in Algeria, Jordan and Sudan likely to see faith as central to their identity whereas those in Lebanon, Palestine and the UAE do not.²⁰ While there are nuances when it comes to defining secular society, a new generation is demanding reform of religious institutions, with more than two-thirds of youth wanting their religious institutions to reform as part of regional modernisation drives. Likely as a response to the destabilising role of religious extremists, half the region's youth consider religion to be a factor holding the Middle East back.²¹

In addition to the reform of religious institutions, another changing value is the desire to separate religion from politics. Over the past decade, there has been an increase in the belief that religious leaders should not interfere in politics, as confirmed by other Middle East polling. Between 2011 and 2020, support for this belief grew from 62 per cent to 78 per cent in Egypt, for example, and 75 per cent to 80 per cent in Turkey.²²

Hand in hand with changing outlooks and values comes a discernible sense of optimism, with six-in-ten young people believing their best days are ahead of them, according to the Arab Youth Survey.²³ This trend is most evident in Iraq, with 46 per cent of respondents agreeing with this statement in 2021 as opposed to only 20 per cent in 2020. Similar trends of optimism and agency can be detected across the region, even in fragile countries such as Libya, Palestine, Syria and Yemen. As generational change takes place through the liberalising of values and greater demand for more responsive politics, youth in the Middle East are finding reasons to be cautiously optimistic. Moreover, they do not share the pessimism about their region's future that has been detected in recent polling.

The priorities of young people are pragmatic and the underlying issues motivating civil-society movements are driven far more by lived experiences and grievances than by particular ideologies grounded in nationalism or religious identity. The top priorities for the new generation are political and civil rights; economic development and reducing unemployment; improving education and promoting technological advancement; resolving conflict and establishing peace; improving women's rights; and sponsoring arts and culture.²⁴ They are reflective of a pragmatic but visionary generation not constrained by the past, or the experiences of previous generations, or any illusion of apathy once – unfairly – associated with societies of the Middle East.

Popular Movements Reveal a Healthy Civil Society

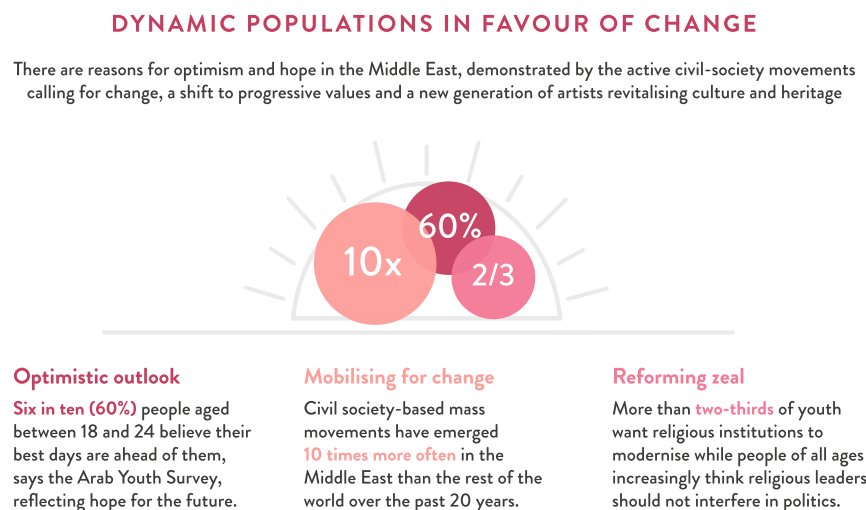
Mass movements and protests have emerged up to ten times more often in the Middle East than in the rest of the world over the past 20 years.²⁵ Alongside calls for economic reform, demands for secular politics and religious coexistence have been central issues driving recent popular mass movements across the Middle East. Our polling shows that 82 per cent of people in the Middle East believe the biggest motivating factor for protestors across the region is the demand to end corruption and nepotism, with 75 per cent identifying a lack of responsiveness to economic and social needs as the second one. Popular protest movements, often led by youth populations, have emerged with particular dynamism over the past five years in countries and cities as diverse as Algeria, Egypt, Gaza, Iran, Iraq, Jordan, Lebanon, Morocco, Sudan, Tunisia and Turkey. Over the past five years, Iran has been in a near-constant state of civil unrest, as the gap between the Iranian people and the Islamist regime has continued to widen. With secularisation and liberalisation occurring at the grassroots level in Iran, the clerical establishment has been responding by advancing processes of top-down Islamisation, which has resulted in protestors calling for the wholesale dismantling of the Islamic Republic.

During the “October” 2019 protests in Iraq and Lebanon, demonstrators vociferously criticised the sectarianism of politics and the endemic corruption of their governance systems, calling instead for a politics without the entrenched interests of religious leaders. Protestors campaigned against the polarising and regressive influence of Islamist parties working to take the region backwards. But far from alienating those from a religious background, protestors voiced their support for and exhibited tolerance of religious differences, attempting to carve out spaces for dialogue free from discrimination. In order to create an inclusive and responsive politics, protestors are recognising there must be coexistence within political movements themselves, which are becoming a microcosm of the vision that youth have for society as a whole.

When politicised religious movements have taken power in the region, the experience has been largely negative, partly explaining this shift to a more progressive, inclusive vision. Our polling demonstrates a dramatic fall in support for Islamist politics and theocratic governments, with 75 per cent of people

across the region saying that when politicised religious movements take power, they have a negative impact. Politicised Islamist movements, such as the Muslim Brotherhood in Egypt, Hamas in Gaza, Hizbullah in Lebanon and the Islamic Republic of Iran, not only repress women and minorities but also stifle cultural freedom and expression. This is one of the reasons that dissent across the Middle East has had to take many forms, with demonstrations, performances and art all being used to express the identities and desires of a new generation. Demonstrations in Iraq, Lebanon and Palestine have brought young Middle Eastern artists into the international spotlight, while young people occupying protest squares have immersed themselves in art and literature to express and formulate a rising sense of a multi-ethnic, inclusive nationalism – geared towards sovereignty and independence.

Figure 3 – Optimism, mobilisation and reforms are some of the cornerstones of the region’s shared vision for change



Source: TBI/Arab Youth Survey/Middle East Institute/MEVS

Art as Protest and a Symbol of Inclusivity

A 15-storey shell of a building adjacent to Baghdad’s Tahrir Square, known locally as the Turkish Restaurant, became the self-declared stronghold of the protestors behind the “Tishreen” (“October”) movement last year. Young people painted murals on the building as well as powerful messages to the government, security forces and outside world. The first five floors of the building have become one of many art venues that have sprung up around Baghdad since the protests as painters – professional and amateur – have turned walls, stairwells and parks into a vast canvas. ²⁶ The paintings, sculptures, photographs and shrines are dedicated to murdered protesters and symbolise a political art rarely seen in Iraq today.

It is notable that many of the paintings and murals feature Iraqi flags while few to none feature references to or promote anti-Western sentiment or anti-Americanism. It is also apparent how a much younger Iraqi generation has been influenced by the internet, where they have found and adopted images that resonate with them, giving them distinctively Iraqi touches: the feminist icon Rosie the Riveter has an Iraqi flag on her cheek while Van Gogh's *Starry Night* now features the Turkish Restaurant building in place of a cypress tree. Some paintings feature comic-book characters but wrapped in the Iraqi flag.

More than a dozen songs have been written for the protests and circulated on social media.

Personalities of the Iraqi arts scenes came together to record a tribute to the fallen protestors.²⁷ In and around Tahrir Square, book clubs, academic debates and informal lectures have been organised. These revitalised forms of expression underpin an effort among young Iraqis to redefine themselves as part of an inclusive vision for society, welcoming of religions, sects, ages and genders, and in opposition to the domineering sectarianism of government and traditional political parties.

Artistic Expression and Cultural Dynamism

The perception of the Middle East as a stale and traditional region with little interest in the creative sectors is not an accurate image today. Our polling suggests that people in the West are more likely to associate the region with conflict, terrorism and violent extremism than creativity and cultural expression.

As opposed to the repressive policies implemented by politicised religious movements, regional initiatives are prioritising arts and culture as part of wider plans for economic diversification. The ruler of Dubai, Sheikh Mohammed bin Rashid Al Maktoum, has said: "Our culture represents the identity of our generations. Our Emirati culture promotes the spirit of love, tolerance, and calls for openness to other cultures. The UAE's drive towards leadership of the future won't be realised unless we enhance our cultural heritage." His words reflect a modernising effort inextricably linked to the region's redefinition of its culture – one that symbolises a confident, inclusive and independent Middle East.

So-called Islamic art is a Western concept that aims to understand the artistic expression of Muslim civilisations within familiar parameters.²⁸ However, in recent years, countries in the Middle East have been playing with these boundaries and breaking them through the emergence of a new era of artistic creativity. Championed by the artists themselves, this transformation of arts and culture is organic, but governments are emphasising the importance of this revitalised sector too. In the once-conservative Saudi Arabia, the economic- and social-reform blueprint Vision 2030 prioritises cultural expression with three aims: promoting tolerance, professionalism, discipline, justice and transparency; preserving Saudi, Arab and Islamic cultural heritage and history; and preserving and promoting national identity in order to

pass it on to future generations. There are commercial implications as well: the Saudi Ministry of Commerce's first strategic objective is to develop an environment that stimulates cultural activities. Taking a global approach, Saudi Arabia is seeking international partners for its festivals, arts and museums, with the culture sector expected to generate \$20 billion, create 100,000 jobs and contribute 3 per cent of gross domestic product (GDP) by 2030.²⁹ The region is already attracting attention on the globe's cultural stage. Opened in 2017 through an investment of more than £1 billion, Louvre Abu Dhabi has become a flagship international arts and culture project for the region and a building block of this burgeoning infrastructure.

Traditionally the epicentre of arts and culture in the Middle East, Lebanon's music, painting, literature, theatre and dance all play a vital role in the country's cultural life, with vibrant live performances and festivals continuing despite the severe economic and political challenges on the ground. In recognition of this activity, UNESCO and the Arab League have named Tripoli as the 2023 Capital of Arab Culture, a title held by Beirut back in 1999. These titles have been awarded despite a civil war that endured for 15 years and today's economic crisis. In the wake of these economic woes, a global pandemic and the Beirut port explosion, the national arts and culture sector has suffered from a lack of investment, a fall in business and structural damage. Yet Lebanon's arts and cultural institutions have struggled on, supported by many who are committed to its historic arts scene. For example, Saleh Barakat, an expert in Arab contemporary art, is dedicated to developing a healthy commercial environment for creative expression in the Middle East. After founding the Agial Art Gallery in 1991 and the Maqam Art Gallery in 2008, he opened the eponymous Saleh Barakat Gallery in 2016, all in Beirut. Barakat considers Lebanon an incubator environment and so he has fused business and culture through the opening of his galleries, providing a space and community for Lebanese art and artists.

Literary events are also thriving in the region. Often overlooked by Western publishing houses, the Middle East has long been home to the largest book fair in the world. Cairo International Book Fair attracted 3.5 million visitors in 2020 while regional fairs in Beirut and Baghdad also draw hundreds of thousands of visitors. An old adage conveys how intrinsic literature is to Middle Eastern culture: "Cairo writes, Beirut publishes, Baghdad reads." The Gulf states too are starting to establish themselves on the region's literary circuit. Once lacking in freedom of expression, Abu Dhabi, Doha, Riyadh and Sharjah now hold increasingly popular book fairs. While societal restrictions remain, these fairs are indicative of the intellectual and cultural movements gaining greater social capital, with many of the works sold at them offering a lens into a diverse and modernising region. In particular, the Riyadh International Book Fair recently included works on taboo subjects such as homosexuality, secularism and magic. Saudi's Acting Media Minister Majid Al-Qasabi even claimed the books would be central to reform in the country.

There are investments in other forms of arts and culture too. Recently, the Moroccan Ministry of Youth, Culture and Communication launched an initiative to support projects that promote music, dance,

magazines and performing arts. The initiative offers a combination of private-sector and government investment to boost creative industries that attract Moroccan youth. A country historically associated with cinema and filmmaking where, at its peak during the 1980s, there were more than 240 movie theatres and 42 million tickets bought annually, Morocco's film industry was comparable to Europe's at the time. Meanwhile, once known as the Hollywood of the East, Egypt is still home to the oldest and only internationally accredited film festival in the Middle East. Cairo International Film Festival was launched in 1976 to ensure that Egypt played a role in the global world of filmmaking and to connect cultures through film. Egyptian producers, directors and actors are Oscar Academy members today while international festivals and awards ceremonies increasingly feature Middle Eastern films. [30](#)

Mohamed Hefzy, former president of the Cairo International Film Festival, has contributed greatly to the scene, writing and producing films that have challenged the status quo and inspired societal change. For example, Hefzy co-produced the first Arabic-language film with Netflix earlier this year – a remake of the Italian film *Perfect Strangers* directed by the Lebanese writer and director Wissam Smayra. Consistent with the original but set in Beirut, the film covers issues such as homosexuality and sex before marriage. While the remake received some backlash from conservatives and clerics across the region, sparking a morality debate, the film leapfrogged to number-one ranking in Egypt, Kuwait, Lebanon, Qatar, Saudi Arabia and the UAE during its first week on Netflix, and to number five on the site's top ten non-English films, showing the willingness of Middle Eastern viewers to engage with work about social transformation.

Satire Captures the Imagination in Iraq

Ahmed Albasheer, whose *Albasheer* show has more than 6.3 million followers on Instagram, takes a cue from *The Daily Show*, John Oliver and *The Mash Report* as a satirical news programme popular within Iraq and across the Iraqi diaspora. The show became a sensation soon after airing on Iraqi television stations in 2014 and is now in its sixth season despite being barred by the Iraqi Communications and Media Commission in 2017. In 2015, the show had a recorded audience of 19 million – more than half of the national population. Today, it can be viewed on the Arabic-language channel DW and is also available to livestream on YouTube. The no-holds-barred show pokes fun at Iraqi politics, society and culture, as well as corruption, sectarianism and terrorism in the country. One of the most influential shows in the entire country, it is said to have played a major role in the Iraqi protests between 2019 and 2021.

Music too is offering an expressive and political outlet in the region. The Levant and North Africa's burgeoning music and underground scene includes the pioneering Lebanese indie rock band, Mashrou' Leila, which began as a student band at the American University of Beirut; the Beirut Groove Collective, featuring DJs and artists; and Rastak in Iran, who play contemporary Iranian folk music to highlight the various dialects and musical traditions of the country's diverse ethnic communities. In the mainstream,

young and contemporary voices have emerged who combine music, acting and rap, borrowing from both Arabic and Western influences, with hits including Mohamed Ramadan's *Bum Bum* – a song that has racked up 280 million views on YouTube.

In Egypt, a popular form of youth music known locally as “mahraganat” (“electro shaabi” or “popular electro”) has gone mainstream in the past few years, with its artists challenging traditional and conservative values through provocative and taboo song subjects, lyrics and dance moves. In 2020, a mahraganat song called *Bint el Giran* or *The Girl Next Door* made regional headlines after it achieved record-high streaming figures on SoundCloud and YouTube, with controversial lyrics such as “I drink alcohol and smoke hashish”. The lyrics and popularity of the song led Egypt's Ministry of Culture to ban this genre from being played in public spaces but despite the efforts of authorities to curb its popularity and pull the plug, such music and lyrics are being used more and more to challenge conservatism, supported by a defiant fan base. During a last performance of the song before the ban, crowds demonstrated solidarity with the musicians by loudly singing along to the taboo lyrics – and streaming of the genre continues today.

Underground, youth-led radio stations are playing their part too and changing the way people in the Middle East consume music. Showcasing regional artists, these radio stations are forming transnational communities and connecting sub-cultural scenes across the region and beyond. For example, Root Radio in Istanbul came into being following a series of events that aimed to establish dancefloors where “artists, friends and music lovers can express their feelings freely and dance all together without sexism, racism, xenophobia and homophobia”. In order to keep this community together during the global pandemic, Root Radio was born.

The Middle East's popular-culture resurgence has been making its mark on global markets too. From international music-streaming giants to independent magazines, the international community is looking to invest in emerging markets in the Middle East. For instance, the Italian-language *ArabPop* magazine was founded as a voice for contemporary Arab artists and intellectuals, and to capture post-Arab Spring music and culture, countering misconceptions about the Middle East in the West.

Music festivals and international sporting events are capitalising on changes in the Middle East. Last year, the MDLBeast Soundstorm festival took place in a desert outside Riyadh, attracting a global audience of more than 700,000. The state-sponsored event witnessed young men and women openly mixing, wearing unconventional clothing and enjoying performances by popular Western musicians such as David Guetta – an appearance that caused great excitement among the Saudi youth. Sporting events, including Formula 1 and the FIFA World Cup, are also taking place across the Gulf this year, drawing in a global audience.

Securing Progressive Change and Artistic Expression

Social movements are proving to be a prominent feature of the region's changing political landscape, providing agency and independence to youth populations and women, who are calling for more progressive societies and representative government. All too often, however, these movements have resulted in instability that has only benefitted repressive, politicised religious groups which, as our polling has shown, the people of the region do not support. Political mobilisation needs to instead capitalise on the optimism of young people and work to crystallise these voices into the structures of conventional political parties.

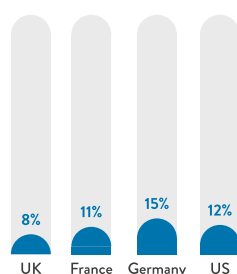
Often overlooked internationally, the Middle East is a rich and vibrant hub for artistic and cultural expression. Although Western governments have commissioned cultural programmes designed to preserve heritage sites in the Middle East, there needs to be a greater commitment to supporting the emerging arts scene and the mould-breaking artists of the region. Regional leaders rightly recognise arts and culture as an asset and are taking the steps to encourage and invest in this sector. To counter perceptions in the West of a conflict-ridden rather than creative and expressive region, the Middle East needs to work harder to secure a more global audience for its cultural output. The voices of the region's artists, musicians and entertainers are rarely heard by Western audiences. With a view to ensuring the region is seen differently, regional leaders should work with stakeholders in the West to expand the reach of this pool of Middle Eastern talent.

Sowing the Seeds of Growth in the New Middle East

Figure 4 – Polling in Western countries and in the Middle East highlights the difference in views about innovation in the region

PERCEPTION: ECONOMIC RIGIDITY AND STAGNATION

On average, only **12%** of people in Western countries believe the Middle East is innovative

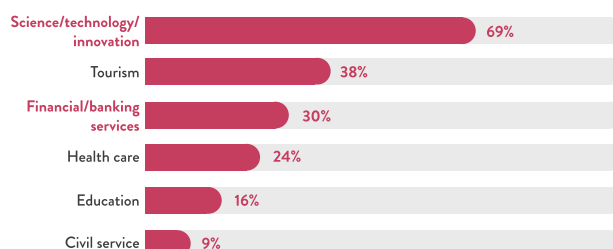


WESTERN POLLING BY YOUNGOV

Original question (and answer displayed in italics)
Which of the following best reflects your view?
The Middle East is a major source of innovation.

REALITY: AN INNOVATIVE OUTLOOK, WITH AN EYE ON THE FUTURE

Science and innovation is the great hope, with **69%** on average in the Middle East choosing this sector as the best career choice for young people



MIDDLE EAST POLLING BY ZOGBY

Original question
Looking forward to 10 years from now, in which of the following areas would you most recommend young people prepare for employment?

The Middle East is experiencing parallel demographic shifts and economic transformation. These dramatic changes are presenting structural challenges that collectively represent both extraordinary opportunities and potential threats set to define the Middle East in the coming decades. The region – where 34 per cent of the total population are aged between 15 and 34 – has the world's largest youth demographic.³¹ However, this is also a region where young people face the biggest struggle to find a job, with youth unemployment almost twice as high as the world average.³² Until recently, women in several Middle Eastern countries struggled to find work in any sectors and they still face barriers; unemployment among women is far higher than among men, with their participation in the labour force standing at 27 per cent across the region.

While hydrocarbons still account for 40 per cent of GDP in most Gulf countries, remaining critical for the region overall, the historic social contract under which rents from natural-resource sectors promised guaranteed jobs for young people no longer holds.³³ This is resulting in a generational policy shift towards youth inclusion and innovation in the region, but is the West recognising this forward-looking transition? As shown by our polling, countries in the Middle East are often considered by the public in Western countries to be backward looking, devoid of the ideas and dynamism that drive innovative

economies, and lacking in entrepreneurial energy. This perception is only amplified by the region's long-standing association with hydrocarbons. For example, only 8 per cent of UK respondents regard the Middle East as a source of innovation, a figure that marginally increases to 12 per cent among those polled in the US. Moreover, an average of 38 per cent of respondents across all countries surveyed responded with "don't know" when asked whether the Middle East is a source of innovation. Contrary to this misconception, the Middle East is one of the world's emerging hubs for innovation and entrepreneurship.

Unrecognised by many in the West, the economic reforms underway in the Middle East are aligned with the ambitions and priorities of its people. Our recent Middle East polling shows that the top priority by a long way in all countries is the creation of more jobs for the region's expanding youth population. A significant 69 per cent across the region recommend that youth prepare for employment in science, technology and innovation over any other sector including the civil service, which was only recommended by 9 per cent as a prospective career choice. To ensure young people are prepared, those polled now believe it is important to prioritise equipping them with the requisite skills: 94 per cent of Tunisians, 85 per cent of Saudis, 78 per cent of Egyptians and Iraqis, and 74 per cent of Lebanese support young people learning technological skills.

Over the past two decades, much of the region's leadership has recognised the need to reorientate their economies away from dependence on natural resources and public-sector employment. A recent Boston Consulting Group poll indicated that the Middle East was home to some of the most committed innovators in the world, ³⁴ defined as companies that make innovation a top priority and invest decisively with that ambition in mind.

Emerging as a "global sandbox", ³⁵ the Middle East's startup landscape is flourishing, with the number of early-stage firms having grown from 3,000 in 2017 to more than 21,000 in 2021. ³⁶ Innovation is increasingly being met with investment, with venture-capital funding reaching more than \$2.5 billion in 2021. ³⁷ Indeed, on the back of the recent Dubai Expo, rising oil prices, the 2022 World Cup and structural reforms, the Middle East is set to outpace global economic growth, with the World Bank predicting a growth rate of 5.2 per cent in 2022 under current conditions. ³⁸

Startups Drive Tunisia's Entrepreneurial Economy

Tunisia is a prime example of a state that recognises the potential of a buoyant startup economy, with the government putting in place policy mechanisms through which innovation is able to thrive. Across the region, young people in particular are facing challenges and uncertainty about their economic prospects as a result of the public sector's contraction combined with a still-nascent private sector, which has left youth unemployment in Tunisia hovering around the 34 per cent mark. ³⁹

As part of the wider Digital Tunisia 2020 strategy, the government introduced the Startup Act in 2018, turning the country into one of the most dynamic tech hubs on the African continent, with a global ranking of 57 in the 2021 Bloomberg Innovation Index. This groundbreaking legislation, aimed at creating an ecosystem conducive to innovation, works through three interrelated elements. First, a legal framework that simplifies the launch process for startups. Second, the creation of a \$200 million Fund of Funds available to specific business verticals and, third, an organisation called Smart Capital that interacts with government ministries to consolidate the ecosystem and country's hubs. As of 2020, 327 startups in Tunisia had received accreditation, entitling them to the aforementioned benefits.⁴⁰

Startups in Tunisia are exploring artificial intelligence (AI) and cybersecurity while the pandemic has stimulated demand for fintech, education and health-tech solutions. In January 2022, Tunisian AI startup InstaDeep raised \$100 million in a series-B financing round from investors such as Google, BioNTech and AI Capital. The government has also launched the \$17 million InnovaTech fund to enable co-investment with the private sector into small and medium enterprises (SMEs), with a specific focus on renewable energy and agri-businesses.⁴¹

To reinforce the government's forward-looking agenda, accelerator schemes are strategically positioned to encourage a culture of innovation. Accelerators are being drafted in both from within the region – take Flat6Labs, which has previously backed firms in Saudi Arabia and the UAE – and from further afield, with international companies including Orange Fab Tunisie, a branch of the global mobile-phone operator. International tech accelerators such as these illustrate increasing Western interest and involvement in the Middle East's growth economies. Multiple global institutions are weighing into the Tunisian tech scene, recognising its emerging potential thanks in part to the government's visionary programme. The World Bank has provided €66.9 million of funding to underpin Tunisia's startups while the EU signed a deal worth €9 million to strengthen the European Investment Bank's support for Tunisian micro-entrepreneurs.⁴²

In the midst of, and despite, significant economic, social and political challenges, Tunisia's tech and innovation sectors are looking to the future and working to stimulate an economy that is both international and entrepreneurial.

Although not reflected by public perceptions in Western countries, international investors are showing greater interest and more optimism about the region, with inbound investment starting to rival that of Silicon Valley.⁴³ Western venture-capital firms and investors are showing particular interest in West Asia's hybrid model of investment, with foreign direct investment (FDI) to this region, which includes several nations of the Middle East, jumping by 50 per cent in 2021 alone, from \$60 billion to \$90 billion.⁴⁴ This is not only critical for financing, but also for integrating the Middle East into global networks that provide ideas and external stimulation to economies in need of change. The UAE has

emerged as a competitive destination for global investment, with Dubai remaining in third place worldwide for FDI. ⁴⁵ Across the region, there was a 64 per cent increase in venture-capital funding in the first half of 2021, with the UAE, Egypt and Saudi Arabia accumulating 71 per cent of total capital invested during the period. ⁴⁶ Venture-capital funding reached \$2.57 billion in 2021, up 138 per cent on 2020. ⁴⁷

Despite these developments, to truly challenge the misconception that the Middle East is backward looking – currently only 19 per cent of those polled in Western countries think of the region as forward looking – it will be crucial to see the impact of innovation at a more grassroots level. It is not only the Gulf states prioritising innovation-driven growth, entrepreneurship and diversification; this pattern can also be detected in other MENA countries, across economies in different stages of growth.

Fintech Gives Bahrain a Competitive Edge

Innovative technologies are underpinning the globally competitive economic transformation taking place in the Middle East, grounded in high ambition that is stimulating more external investment. This is exemplified by Bahrain, which has positioned itself as a fintech leader in the region. Once the financial hub of the Middle East, the country has identified the fintech sector and cryptocurrencies as ways in which it can regain its momentum against regional competitors. ⁴⁸ It has developed a successful fintech ecosystem through the Bahrain FinTech Bay business hub, which brings together its Economic Development Board and Central Bank. A regulatory sandbox has been the first building block of this programme, allowing firms to test new ideas in a virtual space. In addition to a bespoke fintech and innovation unit, the programme has outlined clear guidelines covering everything from crowdfunding to services compliant with Islamic traditions. Furthermore, the region's first cross-border digital-innovation platform, the Central Bank of Bahrain's FinHub 972, encourages collaboration between financial institutions and startups. In 2021, the Bahrain FinTech Bay established a fintech talent programme open to Bahraini graduates interested in the sector. This has been reinforced by a sustainable venture-capital ecosystem, underpinned by the \$100 million Al Waha Fund of Funds.

Countries such as Bahrain are creating more regionwide partnerships, supporting startups to solve challenges facing communities in other parts of the world. In response to the fact that almost 70 per cent of the region's population do not have access to formal banking services, the Bahrain FinTech Bay and the FinTech Association of Israel have signed an agreement of cooperation following on from the Abraham Accords. ⁴⁹ The aim of this historic partnership is to support innovative solutions that integrate the region's population into global financial flows.

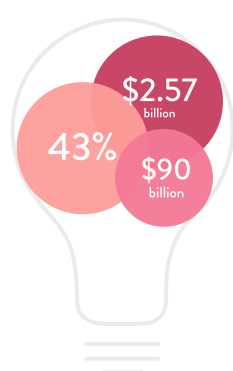
The Middle East's Emerging Entrepreneurs

Despite the misconception that people in the Middle East have little interest in working outside the public sector, polling shows that the region's youth are increasingly aspiring to become entrepreneurs. The 2021 Arab Youth Survey revealed that 43 per cent of young respondents intend to start their own business within the next five years, a rise on 40 per cent in 2020 and 31 per cent in 2019.⁵⁰ Young people are showing fresh interest in the private sector following on from the Arab Spring, which saw intense frustration expressed in response to the lack of job opportunities emerging from the public realm. Tellingly, a 2018 poll by INJAZ Al-Arab saw a 41 per cent increase in positivity about the private sector, with 78 per cent of young people seeing themselves working for a private company in the near future.⁵¹ This underpins a wider generational shift occurring across the region, as career expectations change in parallel with the retreat of more traditional job roles. Ideas of risk-taking and a culture of entrepreneurialism are beginning to take hold, which is challenging the traditional expectations of many who would have aspired to and expected to work in the public sector – once seen as more prestigious and financially secure.

Figure 5 – Investment, entrepreneurship among young people and the global appeal of the Middle East are driving business in the region

DIVERSIFIED BUSINESS SECTORS LIGHTING UP

Business is taking off in the region, supported by a new entrepreneurial generation and more investment



Investment on the up

Venture-capital funding reached **\$2.57 billion** in 2021.

Entrepreneurship runs deep

Middle East youth want to become entrepreneurs, with **43%** keen to start their own business.

Global appeal

Inflows of foreign direct investment jumped **50%** in 2021, from **\$60 billion** to **\$90 billion**.

Source: TBI/MAGNiTT/Arab Youth Survey/Lloyds Bank

While the growing number of startups and rising interest in entrepreneurialism will not be the cure-all for the region's profound economic challenges and high unemployment rates, they are a step in the right direction. The Arab Spring that started 12 years ago was as much an expression of resentment over inequality, economic stagnation and rising unemployment as it was a call for civil rights and liberty.

Young, often highly educated, populations in the Middle East were most impacted by the labour-market saturation in the public sector, with many smart graduates remaining unemployed or underemployed years after obtaining competitive degrees. An entrepreneurial spirit, if cultivated both financially and structurally, could help to relieve pressure on the region's public sector and empower young people to apply their skills to solutions for the future, therefore creating more dynamic environments.

Governments are recognising the significance of this shift. For instance, Sharakah is Oman's Fund for Development of Youth Projects, designed to fund and equip young Omanis who are interested in setting up SMEs. This is coupled with the Al Raffd Fund, which enables SMEs to gain access to early-stage funding, and the Wadi Accelerator, a \$15 million seed-funding programme also based in Oman.⁵² Egypt too has recognised the benefits of entrepreneurship and economic diversification: it is now cheaper and easier to establish businesses in the country because the government is creating a digital platform through which they can be registered, which eliminates many of the obstacles facing startups. This effort has been underpinned by two successful incubators, Bedaya and Fekretak Sherketak, launched by the government to provide funding and mentorship.⁵³ Additionally, in June 2020, the Ministry of International Cooperation launched the Generation Next forum, with the participation of more than 400 entrepreneurs and multilateral-development partners, to consult on how to improve the entrepreneurial ecosystem. This comes after the government hosted the Techne Summit in Alexandria last year, an investment and entrepreneurship event long regarded as the region's primary innovation conference. The burgeoning ecosystem is having an impact, with nearly 57 per cent of Egyptians who were not already entrepreneurs saying they are interested in setting up their own business today.⁵⁴

Education Opens Up New Horizons for Young Saudis

In Saudi Arabia, entrepreneurship is increasingly backed by development programmes at the national level. The country aims to stimulate its SMEs so that they make a 35 per cent contribution to GDP by 2030, representing an increase of 15 per cent. Saudi Arabia is already ranked the first out of 45 countries when it comes to starting a business, according to the Global Entrepreneurship Monitor.⁵⁵ The belief that entrepreneurship and innovation need to be ingrained early on in life has also resulted in the Saudi government reforming the education system.

Educational reforms are being used to underpin these labour-market objectives. The Human Capability Development Programme is designed to equip Saudis with the skills for a globalised workplace, from creative thinking, data analysis and technical abilities to emotional and social skills. Since October 2021, critical thinking and philosophy lessons have been taught in schools as a requirement, with a view to cultivating the next generation while also serving the kingdom's aim of becoming a global leader in philosophical education and thinking, as set out by the Minister of Culture. Saudi hosted a major international philosophy conference in Riyadh to promote free thinking, with the leading American philosopher Michael Sandel among a number of highly

respected academics who participated. Other initiatives include the Young Entrepreneurs Programme, which works with the leading Canadian learning-labs development company to teach seven to 15-year-olds in Saudi the fundamentals of business and problem solving.

For those about to enter the workforce more imminently, the Mohammed bin Salman Foundation has launched the \$10 million Misk Grand Challenge Initiative for the empowerment of young Saudis who are seeking to bring about change in their communities for a better future. Research grants of up to \$100,000 are available for projects that address urgent global challenges. With a view to supporting young entrepreneurs and innovators, the foundation also runs a number of other initiatives to connect advances in science and technology with jobs growth. ⁵⁶

Young women are the principal target demographic for the region's leadership when it comes to encouraging entrepreneurship and filling gaps in the private-sector labour market. Recognising the need to include women in economic transformation, programmes are being introduced to overcome the "MENA paradox": a mismatch between higher education rates among women and their low employment rates. However, as more women use digital platforms and enter entrepreneurial sectors, the number of women in professional and technical jobs is on track to more than double by 2030. ⁵⁷ Female inclusion could increase GDP in a country as large as Egypt by 34 per cent. ⁵⁸ In Saudi Arabia, the increasing recognition that women need to be integrated into the labour market is playing a critical role in economic-growth plans, with the share of women in the jobs market increasing by 64 per cent in just two years between 2018 and 2020. ⁵⁹ To this end, Saudi Arabia has become a global leader in female entrepreneurship, with the kingdom home to the third-highest percentage of women holding such business roles, according to the Global Entrepreneurship Monitor. ⁶⁰

Saudi's leadership is also using educational institutions to channel female entrepreneurship. For example, the Badir Programme for Technology Incubators and Accelerators, an initiative of the King Abdulaziz City for Science and Technology, promotes an entrepreneurial culture through workshops and training programmes for female university students. ⁶¹ This is reinforced through partnerships with universities abroad, including the University of Texas at Austin's Global Innovation Lab, which is hosting the Empowering Saudi Women Through Entrepreneurship programme in partnership with the KAUST Entrepreneurship Centre at King Abdullah University of Science and Technology.

Women are progressively assuming a greater role in the region's economic transformation. In 2017, a study found that 33 per cent of women-run enterprises in the UAE generated revenues in excess of \$100,000, compared to only 13 per cent of women-run enterprises – a much smaller share responsible for generating the same amount in the more developed US market. ⁶² In Tunisia, which is facing parallel climate and economic crises, cooperatives and small businesses have emerged in an attempt to create sustainable livelihoods, with women the forefront of these initiatives. ⁶³

The exponential growth of digital technology is creating new opportunities for female entrepreneurs, especially in the e-commerce sector. With enabled access to new markets, women-led businesses are connecting to the rest of the world. The digital economy is a transformational opportunity because it provides women with the flexibility to plan work around family life, allowing them to run a business from home while choosing the hours they want to work. Online platforms and remote-learning services are helping to develop women's skills, accelerating human-capital growth across the region. Remote work platforms such as Fiverr and Upwork are allowing skilled women to secure an income stream no matter where they are located, reducing their financial dependence, while remote working helps to overcome the safety issues still facing women in the region. Closing the skills gap by training women in leadership and developing women's business skills will further stimulate startups and generate thousands of jobs, transforming the economy of the region.

The world's most innovative ecosystem for feminist-led tech solutions can now be found in the region, as a result of a drive for digital inclusion intersecting with social challenges. Across the Middle East, the issue of sexual assault had been considered too taboo to talk about in public, with many victims left isolated and too afraid to report these crimes to authorities, a situation exacerbated by the lack of support. Following a rise in sexual-assault rates, governments, civil-society organisations and social entrepreneurs have started to develop apps aimed at combating this crime which also offer support to survivors and hold criminals accountable. In Egypt, German University in Cairo graduates Salma Medhat Shaaban and Ahmed Rihan launched the mobile app Matkhafeesh in 2020. Translating as "Don't be scared", it tackles gender-based violence with advanced features that provide social, psychological and legal support, and which help to combat the trauma of sexual harassment whether verbal, physical or online. Concurrently, the Tunisian women's organisation, the Center of Arab Women for Training and Research, launched an app to protect women from sexual harassment. Called SafeNess, it is available to download in Tunisia and Morocco, enables women to share details of their journey home with five trusted people and includes an easily accessible SOS button for calling friends or the police if in danger.

Securing a Future Driven by Innovation for the New Middle East

The view that the Middle East is a backward region with limited potential for innovation, one that is devoid of new ideas, is an inaccurate perception. Not long ago, innovation was constrained by excessive bureaucratic hurdles. Today, government initiatives are catalysing rather than stifling innovation, with increased access to venture capital opening up new possibilities. A community fuelled by innovation is growing rapidly, but it requires support. Emerging startup and technology sectors are gaining ground throughout the region, not just in more affluent countries, while entrepreneurship is increasingly becoming the most desirable profession, particularly among youth. The Middle East is evolving into a global leader in recognising that women's participation in entrepreneurship is critical, while in some other more advanced economies, women continue to lag behind men in this sector.

While there is much progress to commend as the region emerges to be the world's "sandbox", there still remains a need to accelerate innovative solutions to keep pace with the rest of the world. International investment to support growth sectors in less affluent Middle Eastern countries is essential for scaling potential ideas into innovations that can be exported. In line with greater global private-sector involvement, the products developed, even in wealthier Middle East states, also require access to international markets if they are to scale successfully. International support for both finance and product development should be on the agenda for the region's leadership. The Middle East is actively taking steps to bring growth opportunities to traditionally disconnected populations, whether women or youth in rural areas. As the region seeks to engage and mobilise its youth demographic, policies must prioritise connecting innovators from all backgrounds to capital, mentors and markets.

Western governments have recognised the need for support, with development programmes such as the EU's JEUN'ESS aiming to create decent private-sector jobs in disadvantaged areas of Tunisia by strengthening collective entrepreneurship.⁶⁴ Equally, the ELIFE Project, led by the Tunisian Foundation for Development and supported by the French Development Agency, trains unemployed graduates in digital professions to help curb unemployment and contribute to Tunisia's goal of becoming a digital hub in Africa. The US-Middle East Partnership Initiative (MEPI) funds similar projects; for instance, Al-Rawabet in Morocco endorses the growth of high-potential innovation companies while providing opportunities for young entrepreneurs to develop their own businesses.⁶⁵

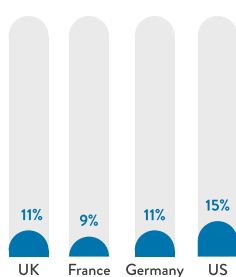
While these development projects are taking the right steps in supporting growth sectors, they need to be amplified to collectively become force multipliers and evolve into full-scale commercial businesses – rather than continuing to take a humanitarian approach. As countries in the region take steps towards deepening peaceful relations with traditionally hostile neighbours, integration with a focus on connecting innovators and entrepreneurs will be transformative, enabling the development of world-leading products and a diffusion of ideas and solutions for the future.

Women Taking the Helm in the New Middle East

Figure 6 – On women's rights, there are stark differences between the perspectives of Western and Middle Eastern respondents

PERCEPTION: NO WOMEN'S RIGHTS

On average, only **12%** say there has been an improvement in women's rights in the Middle East



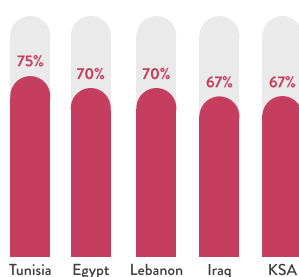
WESTERN POLLING BY YOUNG

Original question

Do you think women's rights in the Middle East have been **improving** or worsening in recent years, or has there been no real difference?

REALITY: SUPPORTING WOMEN'S INDEPENDENCE

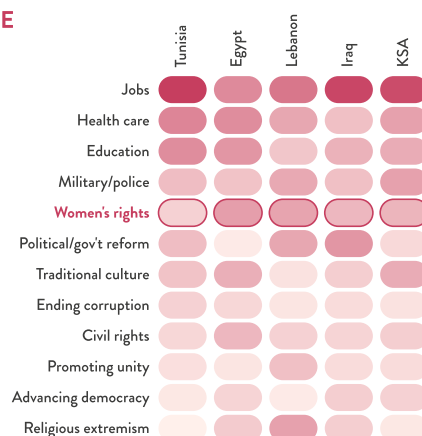
Women's rights are a priority from the government level through to jobs, with **70%** in the Middle East agreeing, for example, on equal employment rights



MIDDLE EAST POLLING BY ZOGBY

Original question

Do you **agree** or **disagree** with the following statement? *Women should have the same rights as men to apply for employment at all levels in government or business.*



Original question

(the issue below is one of 12 provided to respondents)
As you look to the future, which of the following issues are the **most important** for your government to prioritise?
Doing more to advance equal rights for women.

The Middle East remains a challenging environment for women in many aspects of life. They are disproportionately affected by deprivation, crises and Islamist extremism. With a female workforce-participation rate of 19 per cent ⁶⁶ – the lowest of any region – women are also underrepresented in political institutions, with the region's figure of 17.8 per cent well below the global average of 26.5 per cent. ⁶⁷ In some countries, women's legal rights are still not on equal footing with those of men. In Iran, men have legal authority over their spouses, with women requiring permission to travel and divorce, and child custody favouring men. ⁶⁸

In many other countries, though, and across sectors, women in the Middle East are breaking down barriers and advancing to new positions in education, the workforce and politics. Often the drivers of progressive and modernising change, Middle Eastern women have been pushing back against the regressive and misogynistic forces of the region – and this must be recognised. Our polling suggests that Western publics remain unaware of women-led initiatives and the progress being steered by them across the Middle East. Only 12 per cent of people polled in Western countries believe there has been an improvement in women's rights in the Middle East. Although women's advancement is not consistent

across the region, the West must recognise the generational progress now being made and support this trajectory of advancement.

Across the Middle East, there is widespread support for female leadership and gender equality. Our recent polling in the Middle East shows that 70 per cent of people across all countries believe that women should have the same employment rights as men at all levels of business and government. With little or no variation between men's and women's responses, both genders agree that women should have these equal employment rights. Those in support of this statement cited inequities in the home, religious beliefs and socially conservative attitudes as the top barriers to equal employment rights for women. Our polling also shows that all demographics prioritise women's advancement, including men and those who are most religious, with the issue coming in as a top priority in countries such as Egypt, Lebanon and Iraq after jobs, health care and education. Obstacles to female empowerment are being tackled daily by women in the Middle East. The regional desire for the advancement of gender equality and female leadership is today reflected in the successes of Middle Eastern women in education, employment and politics.

Women's Access to Education

The belief that higher education should be a priority for men over women is disappearing. For instance, the percentage of Iraqi people who felt that boys' university education should be prioritised fell from 46 per cent in 2004 to 22 per cent in 2018.⁶⁹ In recent decades, there has been impressive investment in the education of women across the region – resulting in comparable education levels between men and women. According to the Global Gender Gap Report 2020, multiple countries in the Middle East – including Bahrain, Jordan, Kuwait, Qatar, Saudi Arabia and the UAE – are close to reaching gender parity in educational attainment, which takes into account primary, secondary and tertiary enrolment, in addition to literacy rates. Levels of gender equality in education are equal to and, in some cases, surpass those of the West. In fact, girls have been outperforming boys when it comes to learning outcomes across the region. In some Middle Eastern countries, gender gaps have reversed. In Kuwait and Qatar, for example, there are 40.3 per cent and 47.9 per cent more girls enrolled in university than boys respectively.⁷⁰ Arab states are leading when it comes to the number of women taking up science and technology subjects. UNESCO research has found that between 34 and 57 per cent of STEM graduates in Arab countries are women, much higher than in universities in the US or Europe.⁷¹ Arab states are scoring higher than the collective figure for North America and Western Europe in the percentage of female STEM researchers – 41.5 per cent compared to 32.7 per cent as of 2016.⁷²

Smashing the Glass Ceiling Through Science

For decades, the UAE has focused on educating both men and women in its quest to create a knowledge economy. In 1975, the rate of adult literacy was 54 per cent among men and 31 per cent among women. Today, the rates for both genders are close to 95 per cent,⁷³ with Emirati women comprising 70 per cent of all university graduates. In fact, a UNESCO survey has shown that the UAE boasts a remarkably high level – 61 per cent – of female university STEM students, more than the highest average rate across the region. These achievements mean the UAE has become a global leader in gender equality within STEM education, leading to significant contributions to the scientific world. An example of this is the Emirates Mars Mission, which involved the launch of the Hope Probe from Dubai in 2020. Smashing through the glass ceiling, women made up 80 per cent of the science team while the UAE Space Agency is chaired by the female scientist Sarah Bint Yousif Al Amiri.⁷⁴

Women's Leadership At Work

Women's participation in the workforce is gradually increasing across the region and across sectors. For example, 34 per cent of the Middle East's tech startups have female founders.⁷⁵ Not only are women advancing in the STEM sectors, but they are also establishing themselves in more traditional and male-centric sectors such as law and finance. This gradual rise coincides with a decline in the belief that men have more right to a job than women, one that has diminished most notably over the past decade. In Turkey, for example, support for this belief dropped from 56 per cent in 2011 to 34 per cent in 2020, and from 62 per cent to 36 per cent in Egypt.⁷⁶ It is important therefore that we recognise the pioneering women who are striving for female empowerment, despite the remaining societal and practical barriers preventing them from entering the workplace.

Female lawyers were scarce in the Middle East a few decades ago. Today, hundreds of Middle Eastern women are fighting to change the legal system that has historically repressed them. For example, Bayan Mahmoud Al-Zahrani, who was the first practising female lawyer in Saudi Arabia, opened her own all-female law firm in 2014, which has focused on standing up for Saudi women and providing their viewpoint in the historically male-dominated courts. Another pioneering female lawyer in the region is Ihsan Zuhdi Barakat. After studying law at the University of Jordan in 1964, Barakat set up her own law firm in 1988, was appointed a judge in 2002, served as the director of international relations at the Jordanian Ministry of Justice in 2004, became the country's first female attorney general in 2010 and was finally appointed to the Supreme Court in 2017 – making her the first woman to achieve the highest position in the country's judiciary. These two professionals and others have been paving the way for young women across the Middle East who want to become lawyers. In fact, we are witnessing an increase

in female lawyers: in Bahrain today, 35 per cent of all lawyers are women and in the UAE, the number jumped from 13 per cent in 2021 to 19 per cent in 2022. ⁷⁷

Globally, women are underrepresented as leaders in financial institutions. While the Middle East has historically been the most challenging region for female leadership in finance, there have nevertheless been more women taking influential roles in banks, investment firms, financial law and consulting companies. For example, Rola Abu Manneh was named the CEO of Standard Chartered UAE in 2018, becoming the first Emirati woman to lead a bank in the country. According to the recent OMFIF Gender Balance Index, ⁷⁸ the Central Bank of Tunisia was ranked sixth out of 144 central banks globally for gender equality. Having established a three-year strategic plan between 2018 and 2021 to achieve a good gender balance, with women promoted to senior positions, the bank appointed a female vice-governor in 2018 and, for the first time in its history, its executive board is today predominantly made up of women. While financial services in the Middle East are moving gradually towards gender equality, women remain underrepresented, particularly at a senior level. As a result, the Dubai International Finance Centre (DIFC) has partnered with Aurora50, a women-led social enterprise advancing gender equality in boardrooms, to mandate that all Emirati-listed firms appoint at least one woman to their boards. Ultimately, pioneering Middle Eastern women and women-led initiatives are driving positive change and equality in a traditionally male-dominated global sector.

While there has been a steady rise in female participation in the workforce, there are still several challenges that Middle Eastern women have to contend with, including limited access to affordable and high-quality childcare services. Recognising this, there should be additional support and advocacy for accessible childcare centres across the region, which would ultimately empower Middle Eastern women in the workplace.

Women's Leadership in Politics

The prevailing view held by many in the West is that the Middle East's leaders are averse to change and little progress is being made towards inclusion and equal rights, but this does not reflect the reality in many countries. Middle Eastern governments are showing a real appetite for meaningful change, making institutions more inclusive and taking gradual steps towards empowering women to fill political-leadership roles. Women's representation in parliaments has increased gradually from 4.3 per cent in 1995 to 17.8 per cent in 2021. However, significant divergence still exists, with Kuwait on one end of the spectrum not seeing any women taking up seats in parliament prior to 2020 and, on the other, Egypt enjoying a record-high number of female parliamentarians. ⁷⁹

In the UAE, Dr Amal Al Qubaisi made history by becoming the first woman speaker of parliament in 2015. A 2019 presidential decree established a mandatory quota stating that 50 per cent of the seats in

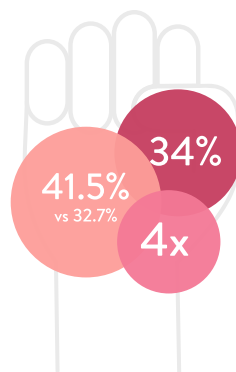
parliament should be held by women, resulting in an increase from seven to 20 in the national parliament, with seven seats filled by elected women representatives and 13 appointed. In the country's diplomatic corps, too, women are making strides, now representing 20 per cent of officials. The UAE's Ministry of Foreign Affairs and International Cooperation has appointed seven Emirati women as ambassadors to represent the country internationally.

Egypt's parliament implemented a gender quota for seats in 2020, which means 25 per cent of lower-chamber seats and 10 per cent of upper-chamber seats are now reserved for women.⁸⁰ The election of 2020 surpassed this quota, with women occupying 27.7 per cent of parliamentary seats today. This is equal to the percentage of women in the US House of Representatives.⁸¹ In Iraq's elections last year, women also surpassed the gender quota, making up almost 30 per cent of parliamentarians (they won 97 of 329 seats in the Council of Representatives of Iraq). Even in Lebanon, which has been facing political and economic crises for years, women's political participation is increasing, with a record 118 women running for seats in the spring 2022 election. This represents a 37 per cent increase compared to the previous election.⁸²

Figure 7 – Women are taking leadership roles in the region's flourishing startups and the science and innovation sector

WOMEN'S EDUCATION AND PARTICIPATION ON THE RISE

Steeped in expertise and startup culture, rooted in representation, women are among the region's most dynamic leaders and mentors today



Starting up

A significant **34%** of Middle Eastern tech startups have female founders, with Bahrain home to the highest share in the world.

Bright minds

Arab states score higher (**41.5%**) than North America or Western Europe (32.7%) for their proportion of female STEM graduates.

A seat in the house

Across the region, women's representation in parliaments rose from 4.3% in 1995 to **17.8%** in 2021.

Source: TBI/Entrepreneur Middle East/Startup Genome

While such progress warrants commendation and can be seen as grounds for encouragement, it is important to question the degree of independent agency for female politicians in what are still transitioning political institutions. Giving political representatives the autonomy to speak out unimpeded on issues of popular concern should go hand-in-hand with empowering female representatives – a further step towards enhancing political responsiveness in the region.

Women's Leadership in Mass Movements and Protests

Many progressive and modernising movements for political change in the Middle East have been led by women and youth populations. When women have felt unrepresented and unheard by their governments, they have taken to the streets to protest against government corruption and misogyny. While the region is often regarded as one characterised by sectarian division, Middle Eastern women from all backgrounds have been coming together to confront political stagnation and traditional stances, and agitating for change for the benefit of all.

Against a backdrop of deteriorating economic conditions and a rapidly depreciating currency in 2019, 500,000 Lebanese protestors from all backgrounds took to the streets. The protest movement, which became known as Lebanon's "October" revolution, involved women at unprecedented levels. Their demands for social, economic and political rights have gradually gained momentum since the beginning of the protests, and range from a just civil code for the judiciary to better economic compensation and citizenship rights passing from Lebanese mothers down to their children. In terms of political representation, 2020 saw six women appointed to the cabinet under former Prime Minister Hassan Diab, including Zeina Akar Adra, who held the role of both defence minister and deputy prime minister – an appointment unprecedented in the Arab world.

Algerian women have been prominent in protest movements for years but in 2019's "Revolution of Smiles", their participation was historically high. Nationwide dissent was sparked by then-President Abdelaziz Bouteflika's decision to run for a fifth term, with protestors calling for freedom, democracy, dignity, government transparency and an end to corruption. Bouteflika has since stepped down but women have continued to protest, pushing back against veiling and efforts made by Islamists to monitor the length of women's skirts.⁸³ Moreover, hundreds of Algerian women protested against the family code – a law that targets female minors but not their male counterparts – on International Women's Day last year. With many considering the law to be repressive and demeaning, protestors fought for its abolition and equal rights for women.

Women have also been central to continuing civil unrest in the Islamic Republic of Iran where protestors have been fighting against the clerical regime's accelerated Islamisation. Iranian women have taken to the streets to fight back against the compulsory hijab and other gendered laws imposed on them by the clerical leadership. Beyond the republic's borders, Iranian women have taken part in anti-regime protest movements on social media. For instance, the famous Iranian activist Masih Alinejad has led international campaigns called #WhiteWednesdays and #LetUsTalk, which fight against the misogynistic laws of the Islamic Republic. Female protestors across the Middle East are not only part of larger social-mobilisation movements occurring domestically, but they are often fighting specifically against wider patriarchal leadership and gender inequality.

In February 2020, Iraq's streets erupted in the "pink and purple" protests that began in response to misogynistic comments made by the prominent Iraqi cleric Muqtada al-Sadr, precipitating a women-led popular movement demanding rights and greater political representation. The pink and purple protests were organised within the context of the broader "Tishreen" ("October") movement that erupted in October 2019 – one of the largest popular movements in recent memory, drawing participants from all religious, ethnic and regional backgrounds. Women were prominent leaders of the movement and the wearing of gender-coded colours highlighted their demands, with signs reading: "Your voice is a revolution, not an indecent act". Campaigning for women's rights, including the implementation of laws against domestic violence, this movement is a progressive and future-facing force organised to combat the regressive and exclusionary.

In 2021, Turkey's President Recep Tayyip Erdogan abandoned an international accord designed to protect women, resulting in nationwide female-led protests. Ten years earlier, Turkey had signed the Council of Europe Convention on preventing and combating violence against women and domestic violence at its launch in Istanbul. Since then, Turkish conservatives have started to consider its principles of gender equality and non-discrimination on the grounds of sexual orientation as equivalent to the promotion of homosexuality and undermining of family values. The withdrawal in July last year caused 5,000 women to march in public in Istanbul and Ankara. Their slogans read, "Enforce the Istanbul Convention. Let's put an end to femicide" and "Turkey is a giant cemetery for women". Demonstrations by feminists and LGBTQ+ activists in Turkey have become increasingly prominent since President Erdogan took his Islamist and conservative turn over a decade ago.

When Rights Become a Matter of Life and Death

Since the Taliban takeover of Afghanistan last August, the rights of women have drastically worsened. Women have lost their jobs, girls no longer receive secondary education and, most recently, women are being forced to wear the burqa and completely veil in public. In response, women and girls have been risking their lives and taking to the streets to protest their vanishing rights and freedoms. The resilience of these women and girls, who are taking huge risks to fight for their education, employment and livelihoods, reveals their dedication to a liberated, modern and prosperous future. In addition to these protests, Afghan women have created a female-led and oriented newsroom called Rukhshana Media, which focuses on the stories and experiences of Afghan women, especially regarding reproductive health, domestic and sexual violence, and gender discrimination. Despite the life-threatening danger – female journalists are known to have been assassinated by the Taliban – the newsroom is committed to exposing the truth about life under the Taliban, and to standing up for women's rights by inviting women from across Afghanistan to write about the current challenges they are facing.⁸⁴

Securing Women's Leadership in the New Middle East

Along with calls for economic and political grievances to be resolved, many popular movements in the Middle East are demanding social change, and inclusion for women and minorities. Contrary to the view in Western countries that says the Middle East does not want progress or modernisation, movements in the region, led by women, are some of the most determined and passionate forces for inclusion in the world. There is also evidence the region is changing to meet these demands.

While there is noteworthy progress that must be better understood in Western countries, the West must equally be proactive in supporting women's leadership. Ongoing projects include LEAD, an initiative commissioned by the German Federal Ministry for Economic Cooperation and Development, which empowers women in decision-making processes and supports meaningful political participation in Jordan, Lebanon and Palestine.⁸⁵ The Arab Women's Enterprise Fund (AWEF) run by the Foreign, Commonwealth and Development Office (FCDO) similarly invests in the empowerment of women, but instead focuses on market-system reform and the economy. AWEF has financially supported actors and institutions committed to gender equality and better working conditions for women, improved their financial literacy in the region, and generated networks for women-owned, home-based businesses to amplify their economic opportunities.⁸⁶

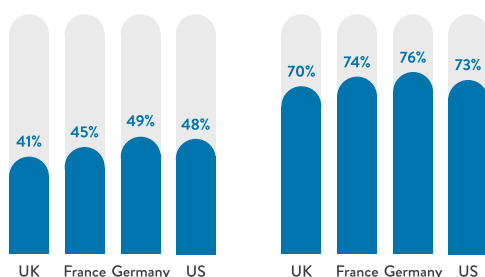
In the West, significant women's inclusion in the sectors specified above is also relatively recent. This is why more should be done to connect women's advancement champions from the West with their counterparts in the Middle East. Much of the region's leadership recognises the need to ensure that the economic transition currently underway is inclusive, while investment decision-making in the West should take into account how resources will empower women of the region on the global stage.

Partnerships for Prosperity and Peace in the New Middle East

Figure 8 – People in the West and in the Middle East diverge significantly on matters of peaceful coexistence and stability in the region

PERCEPTION: A HOSTILE AND UNSTABLE REGION

On average, **46%** regard the Middle East as hostile or unfriendly towards the West while **73%** say conflict will always be likely in the region



WESTERN POLLING BY YOGOV

Original question

(and answer displayed in *italics*)

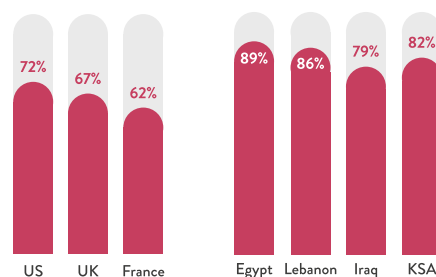
Thinking about the Middle East and its attitude towards Western countries, which of the following best reflects your view? *Middle East is hostile or generally unfriendly towards countries in the West.*

Original question

Thinking about the Middle East and its attitude towards Western countries, which of the following best reflects your view? *It is likely there will always be conflict in the Middle East.*

REALITY: A YES TO THE WEST AND PEACEFUL COEXISTENCE

In the Middle East, public opinion of the US and the UK is riding high, on average **72%** and **67%** in favour respectively, while there's a broad consensus that governments should protect citizens of all faiths equally



MIDDLE EAST POLLING BY ZOGBY

Original question

Is your opinion of each of the following countries **favourable** or **unfavourable**?

Original question

How **important** is it that governments do not favour the rights of citizens of one faith but act to protect the equal rights of citizens or residents of all faiths?

The Middle East remains one of the world's most violent regions in terms of ongoing conflicts. Yemen's civil war is considered one of the world's worst humanitarian crises, with at least 233,000 people having died as a result of the conflict since 2015.⁸⁷ In Syria, the United Nations estimates that more than 350,000 civilians and combatants died in the civil war between 2011 and 2021, with more than 17 million people requiring humanitarian assistance.^{88 89} The Israeli-Palestinian conflict continues to flare up, including in wars between Israel and the Gaza-based group Hamas. The conflict of spring 2021 claimed the lives of 13 people in Israel as a result of rocket fire, with at least 248 Palestinians killed in Gaza.⁹⁰

Despite these ongoing conflicts, there has been significant progress towards ending war in the region as Middle Eastern leaders have taken steps to build a cooperative and peaceful future. However, the prevailing view among Western publics is that the Middle East is more often a source of problems than solutions. In response to the question of whether there will always be conflict in the Middle East, 70 per

cent of people polled in the UK responded in the affirmative. As exemplified by the “forever wars” narrative, Western publics and politicians adhere to an outdated, fatalistic assumption that the Middle East will forever be beset by conflict and violent extremism, with little – if any – hope for the region becoming a peaceful and prosperous place, free of the warfare that has plagued it for decades. In addition to widespread pessimism about the inevitability of conflict in the Middle East, Western publics tend to be wary about relations with the region. Our recent polling showed that 46 per cent of respondents in the West believe the Middle East is hostile or generally unfriendly towards their countries. There is still a significant portion of Western populations who view the Middle East as an antagonistic region with little potential for greater partnerships.

In spite of this, people in the Middle East and much of its leadership desire regional peace and partnerships with Western nations. First and foremost, unity and coexistence are top priorities for the majority of people in the Middle East. Our recent polling in the region shows a desire for intercommunal unity: 78 per cent believe it is important for their governments to uphold the rights of citizens of all faiths. Much of the leadership and populations of the Middle East do not want conflict and division, and recent historic peace agreements counter these Western misconceptions and offer hope for the future. Contrary to the West’s belief that people in the Middle East are hostile towards them, the region is in fact looking to the West: 72 per cent look favourably on the US, while the figure for the UK is 67 per cent and for France 61 per cent. This debilitating disconnect is precluding stronger partnerships between the peoples of the Middle East and the West.

As a consequence of viewing the Middle East as a “problem region”, Western publics have little confidence in it offering solutions to today’s most pressing global challenges, including achieving peace between states. Only 23 per cent of those polled in Western countries can envision a future where the world looks to the Middle East for global leadership. However, the Middle East is emerging as an influential hub for confronting humanity’s collective problems, demonstrating that the region is fast becoming a future source of global leadership and solutions.

Leadership for Peace in the New Middle East

In August 2020, arguably one of the most momentous peace treaties of the 21st century to date was signed: the Abraham Accords. Stewarded by the US and long in the making, Israel normalised ties with the UAE and Bahrain. While neither country had ever been at war with Israel, neither had these states ever enjoyed diplomatic relations. Many observers downplayed its significance as a strategic “marriage of convenience” in the face of a common threat from Iran. However, what has emerged over the past two years is an altogether more robust and fulfilling relationship: a “warm peace”. Greeted with a muted backlash in some corners and effusive praise in others, the accords saw Morocco and Sudan soon following suit.

The warm-peace commitment is evident in the two pillars of the treaty. One is idealistic, with the Abraham Accords signalling to the people of the region, as well as to the world, that politics and old prejudices are giving way to opportunity and that now is the time to establish lasting regional stability and prosperity. A traditionally sceptical Middle Eastern public is daring to hope that such steps are possible and permanent, as polling suggests increasing support among populations for the deal. In December 2020, the Bahraini and Emirati publics largely supported the decision at 45 per cent and 47 per cent respectively, whereas when polled in 2018, a similar proportion of the Emirati population strongly disagreed with the proposition that Arab states should work with Israel.⁹¹ Meanwhile, in non-signatory Saudi Arabia, 41 per cent of the public backed the accords and 37 per cent supported business- and sports-related contact between Saudi Arabia and Israel, a sharp rise from June 2020 when only 9 per cent of Saudis supported such contact.⁹²

The treaty has an equally pragmatic pillar: one that focuses on regional economic growth. Some projections indicate the Abraham Accords could create as many as 4 million jobs and generate as much as \$1 trillion in economic activity.⁹³ Through rapid steps towards trade liberalisation, bilateral trade between Israel and the UAE is expected to grow by as much as \$6.5 billion in both goods and services.⁹⁴ Earlier this year, Israel and the UAE signed a historic free-trade agreement that removes or reduces 96 per cent of tariffs on goods traded between the nations.⁹⁵ Observers are projecting robust bilateral private investment, including Emirati investment in Israeli gas fields and joint Arab-Israeli businesses, and Israeli investment in Emirati fintech and digital banking. Significant deals have included the UAE's establishment of a \$10 billion fund aimed at investing in specific sectors in Israel; and the Bahrain Electricity and Water Authority has signed an agreement with Israel's national water company, Mekorot.^{96 97}

Equally important to the Abraham Accords' warm peace are the interpersonal opportunities for dialogue and collaboration, which are flourishing through a range of agreements between institutions. Israel's University of Haifa and Dubai's Zayed University signed an academic-collaboration agreement focusing on food and water security. Israel's Bar-Ilan University signed an agreement with the UAE's Gulf Medical University to promote medical research and improve public health throughout the Middle East, while Sheba Hospital in Israel signed a first-of-its-kind agreement with Bahrain's Salmaniya Medical Complex and King Hamad University Hospital to strengthen cooperation.⁹⁸ Meanwhile, the National School of Business and Management in Casablanca and Tel Aviv University's School of Management signed an agreement to cooperate on enhancing education and job opportunities for Israeli and Moroccan students.

The Dahan Center for Culture, Society and Education in Sephardic Heritage at Bar-Ilan University and the Centre for Studies and Research on Hebrew Law in Essaouira, Morocco signed a memorandum of understanding (MOU) on wide-ranging cooperation. The National Archives of the UAE and the

National Library of Israel also signed an MOU committing the two organisations “to work together in support of mutual goals and for the benefit of the international cultural- and documentary-heritage sector”. With regards to cultural exchange, Emirati and Israeli artists collaborated to create an exhibition in Jerusalem featuring calligraphy in Hebrew and Arabic and, last year, the Jerusalem Symphony Orchestra performed in Dubai for the first time.^{99 100} At the 2020 Expo in Dubai, held between 2021 and 2022, Israel inaugurated both its pavilion and the first official interfaith delegation from Israel to the UAE to mark the start of Tolerance Week, which was aimed at reimagining how social spaces, physical environments and storytelling could foster multiculturalism and peaceful coexistence.¹⁰¹ At the 2020 Expo, Israel announced that 250,000 Israelis had visited the UAE since the accords were announced, despite the pandemic, with observers expecting an increase in Muslim tourists to Israel – by as many as 10,000 a month – thanks to the agreement.¹⁰²

Building Peace Between Religions

The Jordanian Interfaith Coexistence Research Centre (JICRC) was established in 2003 in Amman. In the wake of terrorism and the US war on terror, this regional initiative considered it paramount to encourage positive and peaceful dialogue between Christian and Muslim communities. To this day, the JICRC assists governments, organisations and individuals on religious-based peacebuilding in Jordan and in the region more generally. Their work is focused around three coexistence programmes that are designed to reach crucial members of society invested in peace and understanding – namely, imams, women and youth. “Imams for Coexistence” presents moderate voices of the Muslim world to the West, showcasing the imams working for harmony, tolerance and moderation. Additionally, the programme encourages interfaith dialogue and deepens cultural ties between the West and the Middle East. “Women for Coexistence” organises workshops and conferences for women in the region, providing a forum that celebrates interfaith values such as harmony, gender equality and peace. “Youth for Coexistence” puts on events for Muslim and Christian youth to engage in dialogue and to build relationships based on respect and understanding. They then go on to lead peaceful coexistence initiatives in their communities.

Conflict-resolution and coexistence programmes are becoming cornerstones of Middle East governments’ foreign policies, in particular for countries such as Oman, which acts as a diplomatic broker for regional agreements. Rather than turning to other international actors, Middle East leaders are demonstrating increasing resolve to mediate the region’s political challenges and conflicts themselves, as witnessed in Egypt’s long-standing and active role in calming tensions and brokering peace between Israel and Hamas. There are historic precedents for these peace-making efforts, such as the Arab Peace Initiative, otherwise known as the Saudi initiative, which was spearheaded by then-Crown Prince Abdullah of Saudi Arabia two decades ago. It remains a “live” proposal to end the Arab-Israeli conflict, having been first endorsed by the Arab League in 2002. Other regional peace-building initiatives include

the Pan Arab Electricity Market, advised by the World Bank, and the Blue Peace Middle East Initiative to transform water management into a catalyst for economic development and peace.

Alongside these high-level diplomatic efforts, countries in the region are working to increase person-to-person exchange and collaboration. A new generation in the Middle East is demanding governments work towards regional cooperation, with a lack of regional unity considered the third-largest obstacle facing the Middle East by recently surveyed youth, after the rising cost of living and unemployment.¹⁰³ Political leaders are responding to this desire for unity, establishing regional initiatives aimed at encouraging coexistence between religions, cultures and nationalities, not only within the region but beyond. For instance, as part of its “cultural transformation”, Saudi Arabia has introduced a new visa scheme to encourage international artists to visit, alongside a new residency programme allowing artists to settle permanently. The aim is to increase freedom for cultural exchange and to underpin the kingdom’s plans to accelerate the arts and culture sector.¹⁰⁴

The Middle East was the region in which tariffs decreased the most during the global financial crisis, especially on manufactured goods. Average uniform tariff rates (ad valorem and specific) for the region fell from nearly 15 per cent in 2002 to 5 per cent in 2011.¹⁰⁵ Progress is being made in improving transport infrastructure: the implementation of the Mashreq Corridor Program, which aims to remove cross-border constraints, is expected to increase trade by about \$25 billion a year by 2030. It is also set to create a large number of permanent jobs, mostly in export-oriented light-manufacturing industries, which typically have a higher-than-average share of female employees. Economic integration in the power sector is at an early stage of development. Major initiatives, such as the North Africa/Middle East/European power pool, are taking shape, although much remains to be done to introduce competition in the sector. Last year, Israel and Jordan, with support from the UAE, agreed to expand cooperation in energy and water.¹⁰⁶ This agreement also committed to expand trade with Palestine.

Scientific integration is increasing too, with Israelis and Arabs working together at Synchrotron-light for Experimental Science and Applications in the Middle East (SESAME). This project, co-founded by the European Commission, aims to expand exploration in areas such as materials science, chemistry, biology, archaeology and other fields. Opening up new possibilities, SESAME could lead to findings that uncover what the “frankincense” mentioned in the Bible was made of or could reveal how structures at Jordan’s Petra archaeological site were decorated.

Global Leadership on Climate Change

According to popular public opinion in Western countries, there are low expectations of the Middle East when it comes to global leadership. At variance with this perception is the reality that the Middle East is exhibiting considerable leadership on global challenges. With regards to the Covid-19 pandemic, regional

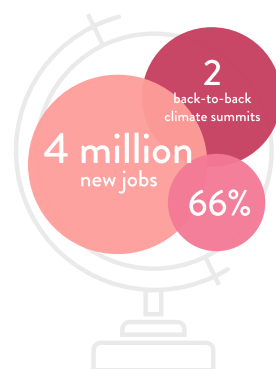
responses varied between countries, as in other regions, but many Middle Eastern countries acted more rapidly and efficiently than Western governments. The Organisation for Economic Co-operation and Development lauded countries such as Jordan for its crisis management, the UAE and other Gulf countries for their rapid use of advanced technologies and Morocco for its testing regime.¹⁰⁷ In part due to the region's young population, hospitalisation and mortality rates have been lower than in other regions.¹⁰⁸ However, while individual nations demonstrated individual leadership during the pandemic, regional organisations were less active.

Climate change is a global challenge that has spurred the region's nations to come together, as well as to take substantive action individually. The next decade will witness the Middle East emerge as a major convenor for global leadership on climate change. Back-to-back COP climate-change summits will be held in the Middle East, first in Egypt in 2022 and then in the UAE's Dubai the following year. Governments in the Middle East are aiming to demonstrate problem-solving leadership on the world's most pressing challenge through action, with Saudi Arabia having hosted an international summit driven by its Middle East Green Initiative (MEGI) in 2021. The same year, the UAE hosted the Regional Dialogue for Climate Action Summit with leaders such as US Special Presidential Envoy for Climate John Kerry and COP President Alok Sharma attending. The region has also established a Middle East and North Africa Climate Week (MENACW) for 2022 and, under the umbrella of the Arab League and in partnership with the private sector, the UAE launched the Arab Youth Council for Climate Change (AYCCC) initiative on International Youth Day in 2021.

Figure 9 – With trade barriers disappearing and the region becoming a global stage, the Middle East is forging partnerships for prosperity and to solve the world's greatest challenges

DIPLOMACY ACCELERATING PROSPERITY AND LEADERSHIP

Regional leadership has been instrumental in convening the world to combat climate change while cooperation has been agreed between countries without a history of diplomatic relations



A global stage

The world will turn to the Middle East for leadership on climate change as **Egypt and the UAE host the 2022 and 2023 COP summit.**

Pioneering peace

The 2020 Abraham Accords could create as many as **4 million jobs**, generating up to \$1 trillion in economic activity.

Removing blocks to prosperity

Trade barriers, such as average uniform tariffs, have declined exponentially **by 66%.**

Source: TBI/Abraham Accords Peace Institute/Middle East Institute

The region's pressing need to diversify its economy and move away from extraction-intensive industries is leading to some of the world's most ambitious climate targets as well as investment in clean technology. The Middle East is more ambitious than much of the rest of the world when it comes to renewable-energy targets, with Saudi Arabia aiming to generate 50 per cent of its electricity from clean sources by 2030 and to reach net zero by 2060, while also announcing \$340 billion in net-zero investments to realise its ambition of a "carbon circular economy" alongside the UAE. ¹⁰⁹ The UAE is similarly planning to generate 50 per cent of its energy from renewable sources by 2050, with a 70 per cent reduction in emissions from energy production overall. ¹¹⁰ These targets are in line with the US, which is on track to provide between 35 and 50 per cent of its energy through clean methods by 2030.

Global leadership and the need to address the climate crisis is also generating regional cooperation. The 2019 establishment of the Regional Collaboration Centre (RCC) MENA and SA was made possible with the signing of an MOU between UN Climate Change and the World Green Economy Organization, with the support of the UAE Ministry of Climate Change and Environment. RCC MENA is dedicated to the objectives of the UN Framework Convention on Climate Change, the Kyoto Protocol and the Paris Agreement. The centre helps channel local, regional and global resources towards climate action and facilitates the implementation of countries' Nationally Determined Contributions (NDCs) to the Paris Agreement.

Securing a Peaceful and Global Future for the New Middle East

While there is much progress to celebrate following the Abraham Accords and other initiatives, there remains a great deal of work to be done to bring countries and communities together. The Israeli-Palestinian conflict continues to flare up, most recently with the escalation of terrorist attacks in Israel and unrest in the West Bank. Palestinian politics is becoming increasingly unstable, and Palestine's economic conditions remain perilous. Existing responses from Western governments include the FCDO's Middle East Peace Process (MEPP), which is designed to build effective and accountable Palestinian institutions; support Palestinians by working towards peace and a two-state solution; and protect vulnerable communities by upholding international humanitarian law. The US's Middle East Partnership for Peace Act (MEPPA), passed in 2020, is a \$250 million programme that identifies building economic, social and political relations between Israelis and Palestinians as the best way to promote peace and coexistence. Together, Western governments must prioritise facilitating a permanent-status agreement, perhaps via partnerships with other countries in the region.

In addition to the Israeli-Palestinian conflict, ending the spread of Islamist extremism is part and parcel of ending regional conflict. As well as designating and sanctioning Islamist groups, the West must provide support to progressive modernisers in the region to defeat these extremist ideologies where they have taken root, including through offering a more compelling, progressive path for the region's youth.

To support greater integration, the regional leadership could take steps towards the harmonisation of education systems, of standards in goods and services – in particular, in emerging areas such as digital technologies – and the new economy, including taxation. Greater freedom of movement should be a priority, including making it easier to acquire travel and short-stay visas with a sectoral focus, such as visas for graduate students, entrepreneurs and those working in creative fields. The region should also seek to limit the impact of political tensions on trade, indicating to international investors that disagreements will not inhibit economic growth. There are recent precedents for this including between Israel and Turkey, as well as Egypt and Turkey. [111](#) [112](#)

In addition to fostering peace and further integration within the region, the Middle East is gradually taking a lead on the global stage. With many countries in the Middle East being lauded for their response to the pandemic, the region is continuing to confront the perception that it is not a source of leadership on global challenges by hosting back-to-back COP summits to tackle climate change. In anticipation of these upcoming summits in Egypt and the UAE, regional leaders have hosted a number of preliminary summits, including some giving a voice to young people. They are also adopting some of the world's most ambitious targets, investing heavily in renewable energy and cooperating to confront the inherently borderless challenge of climate change. As the Middle East convenes the world, the next two years will be critical to addressing the climate crisis.

Conclusion

Contrary to the views of many in the West, the Middle East and its people are forward looking and increasingly optimistic, showing widespread support for transformational modernisation programmes, such as the one in Saudi Arabia. Equally, they have an aversion towards politicised religious movements. Whereas the West fails to see the region as a source of innovation, the vast majority of people in the Middle East regard science and technology as the future. From North Africa to the Gulf, and even in those suffering conflict, the transition to innovative and entrepreneurial economies is turning countries of the Middle East into startup nations.

People in the West believe there has been no progress for women in the Middle East, yet a broad consensus is emerging in support of women's rights and leadership across the region. As demonstrated by this report, women are excelling in education and emerging as leaders in business and politics. In some cases, opportunities for advancement are surpassing those available to women elsewhere. Women are also at the forefront of social change, leading popular reform campaigns for a more inclusive future.

Those polled in the West are getting it wrong when they think the Middle East will always be at war with itself or will remain hostile towards Western countries. The majority of people in the region are pluralistic and want their governments to protect the rights of minorities. The Abraham Accords have unleashed decades of pent-up potential and goodwill towards people of other faiths, demonstrating to an initially doubtful public the real dividends of peace. Finally, people in the Middle East are far from hostile towards the West, with the region additionally taking steps to convene the world on its most pressing challenges in the years ahead.

However, this progress is fragile and requires the constructive cooperation of the international community and, in particular, a reluctant West. A sizeable proportion of people in the West believe their own countries should have less involvement in the Middle East, and there is little ambition to do more to support the region. It was less than a decade ago that the brutal Islamic State ruled over large territories in the Levant and it remains a regional and global threat today. The Islamic Republic of Iran is not only accelerating repression of its own people even as they demand freedom, it is also expanding its destructive ideology and influence beyond its borders to destabilise the region. Quasi-state Islamist terrorist groups, such as Hamas and Hizbullah, are holding their people hostage to the past while the tragic fall of Kabul to the Taliban demonstrates that progress is swiftly and shockingly reversible. The destructive ideologies underpinning these regressive extremists have a global reach, as witnessed by the international spread of Islamist extremism. The West therefore has a vested interest in supporting the forces of progressive modernisation, as highlighted in this report. Given the history of Western colonialism in the Middle East, it also has an obligation.

The gap between Western and Middle Eastern understanding needs to be bridged, as the priorities of prosperity and peace are shared by both peoples, with movements in both regions calling for action on climate change, more accountable governments and improved economic opportunities. It is in these common causes that the West can deepen its international ties and intercultural understanding of the Middle East. The Tony Blair Institute for Global Change's New Middle East programme is grounded in the optimism of the region's people yet understands the urgency for action, given the threat of regressive extremists. It is both this optimism and urgency that have led us to set out this pragmatic, inclusive and progressive path to the West's constructive involvement in this dynamic region.

About James Zogby – Polling Partner

James Zogby co-founded the Arab American Institute – a Washington, DC-based organisation that serves as the political and policy-research arm of the Arab American community – in 1985 and he continues to serve as its president today. He is director of Zogby Research Services, a firm that has conducted groundbreaking surveys across the Middle East.

In September 2013, President Obama appointed Dr Zogby to the United States Commission on International Religious Freedom. He was reappointed to a second term in 2015 and concluded his service in May 2017. He was twice elected vice chair.

He is featured frequently on national and international media as an expert on Middle East affairs. Since 1992, he has written a weekly column published in 12 countries. In 2010, Zogby published the highly acclaimed book *Arab Voices*. His 2013 e-books, *Looking at Iran: The Rise and Fall of Iran in Arab Public Opinion* and *20 Years After Oslo*, are drawn from his extensive polling across the Middle East with Zogby Research Services. His most recent book, *The Tumultuous Decade: Arab, Turkish, and Iranian Public Opinion - 2010-2019*, analyses the fascinating transformations taking place across the Middle East region following the US withdrawal from Iraq and the Arab Spring.

Dr Zogby has also been personally active in US politics for many years; in 1984 and 1988 he served as deputy campaign manager and senior advisor to the Jesse Jackson presidential campaign. In 1988, he led the first ever debate on Palestinian statehood at that year's Democratic convention in Atlanta. In 2000, 2008 and 2016, he served as an advisor to the Gore, Obama and Sanders presidential campaigns.

For the past three decades, he has served in leadership roles in the Democratic National Committee. He currently serves as chair of the DNC Ethnic Council, an umbrella organisation of Democratic Party leaders of European and Mediterranean descent. He served on the DNC's Executive Committee between 2000 and 2017, and for more than a decade served as co-chair of the party's Resolutions Committee.

In 1975, he received his doctorate from Temple University's Department of Religion where he studied under the Islamic scholar Dr Ismail al-Faruqi. He was a national endowment for the humanities post-doctoral fellow at Princeton University in 1976 and is the recipient of a number of honorary doctorate degrees.

Polling Methodology and Annex

This report draws on two distinct polling commissions: one conducted in Western countries (France, Germany, the United Kingdom and the United States) by YouGov on behalf of the Tony Blair Institute for Global Change in March 2022; and a second in Middle East countries (Egypt, Iraq, Lebanon, Saudi Arabia and Tunisia) conducted by Zogby Research Services on behalf of the Institute between March and April 2022.

Aggregate data and averages for both “the West” and “the Middle East” are drawn exclusively from the samples derived from these two polls.

Raw data of the survey results are available on request.

YouGov Polling in Western Countries

Polling in Western countries was carried out by YouGov between 18 and 28 March 2022. YouGov surveyed 6,268 adults in four countries: France: 1,065; Germany: 2,005; the United Kingdom: 1,780; and the United States: 1,418. All figures have been weighted and are representative of all adults (aged 18+) in the respective country. All surveys were carried out online.

	UK	US	Germany	France
To what extent do you think people in the Middle East share the same values as people in countries like yours?				
People in the Middle East share all of the same values	2	4	4	4
People in the Middle East share most of the same values	16	21	17	12
Total share all of/most of the same values	18	25	21	16

	UK	US	Germany	France
People in the Middle East don't share many of the same values	41	37	33	28
People in the Middle East share none of the same values	14	14	26	38
Total don't share many/share none of the same values	55	51	59	66
Don't know	28	24	19	19

Generally speaking, do you think people in the Middle East are backward looking or forward looking?

Very backward looking	15	14	14	26
Fairly backward looking	27	25	34	32
Total backward looking	42	39	48	58
Fairly forward looking	14	19	19	9
Very forward looking	2	4	4	3
Total forward-looking	16	23	23	12
Don't know	42	38	28	30

Which of the following best reflects your view?

The Middle East is a major source of innovation	8	12	15	11
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	UK	US	Germany	France
The Middle East is a minor source of innovation	26	27	30	25
The Middle East is not a source of innovation at all	22	23	23	26
Don't know	44	38	32	39

Do you think women's rights in the Middle East have been improving or worsening in recent years, or has there been no real difference?

They have generally been improving	11	15	11	9
No real difference – women's rights in the Middle East were and still are good	8	10	14	14
They have generally been worsening	10	14	15	17
No real difference – women's rights in the Middle East were and still are bad	49	39	44	41
Don't know	23	22	17	19

Thinking about the Middle East and its attitude towards Western countries, which of the following best reflects your view?

The Middle East is generally a friend and ally to countries in the West	5	7	6	4
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	UK	US	Germany	France
The Middle East is generally a friendly rival to countries in the West	17	18	18	23
Total friend and ally/friendly rival	22	25	24	27
The Middle East is generally unfriendly towards countries in the West	32	34	38	33
The Middle East is generally a hostile threat towards countries in the West	9	14	11	12
Total unfriendly/hostile rival	41	48	49	45
Don't know	37	27	27	28

Thinking about the situation in the Middle East, how likely, if at all, do you think it is that there will always be conflict in the Middle East?

Very likely	21	35	30	28
Fairly likely	49	38	46	46
Total likely	70	73	76	74
Fairly unlikely	7	8	8	6
Very unlikely	1	3	4	2
Total unlikely	8	11	12	8
Don't know	22	16	13	18

	UK	US	Germany	France
When it comes to tackling global challenges (e.g., climate change, pandemic), which of the following best reflects your view?				
The Middle East is a global leader in facing global challenges	1	4	4	14
The Middle East is an emerging global leader in facing global challenges	9	12	18	31
Total a global leader	10	16	22	45
The Middle East is not really leading on a global level when facing global challenges	27	24	23	21
The Middle East is not a global leader at all in facing global challenges	24	27	26	5
Total not a global leader	51	51	49	26
Don't know	40	33	30	29
Generally speaking, do you think it is in the interest of your country to be more or less involved in the Middle East, or do you think the current level is about right?				
Less involved	27	30	18	22
Current level is about right	36	35	44	45
More involved	7	13	17	7
Don't know	30	21	21	26

Zogby Research Services Polling in Middle East Countries

Face-to-face polling in the Middle East was carried out by Zogby Research Services between 17 March and 7 April 2022. Zogby Research Services surveyed 4,856 adults in five Arab countries: Egypt: 1,043; Iraq: 1,044; Lebanon: 857; Saudi Arabia: 1,043; and Tunisia: 869. Polling was conducted with regional representation in mind.

	Tunisia	Egypt	Lebanon	Iraq	Saudi Arabia
Saudi Arabia [in KSA “Your country”] is engaged in a programme to liberalise the country, allowing for greater social freedom and limiting the role of the religious police in the country. Do you support or oppose this programme?					
Support	87	65	60	63	89
Oppose	13	35	40	37	11
Do you agree or disagree with the following statement? Religion as it is currently taught and practiced in my community conflicts with the modern world and needs to be changed and reformed.					
Agree	71	37	65	77	73
Disagree	29	63	35	23	27
Which has been the most responsive to delivering social-welfare services, educational services and health-related services: government agencies, religious organisations or international organisations?					
Government agencies	78	55	67	68	67
Religious organisations	15	29	25	25	17
International organisations	7	10	7	7	11

	Tunisia	Egypt	Lebanon	Iraq	Saudi Arabia
Not sure	0	6	1	0	5
When politicised religious movements and their supporters have taken power in the Middle East, in general have they had a positive or negative impact?					
Positive impact	10	36	30	28	20
Negative impact	90	64	70	72	80
How important is it that governments not favour the rights of citizens of one faith but act to protect the equal rights of citizens or residents of all faiths?					
Important	55	89	86	79	82
Not important	45	11	14	21	18
Do you agree or disagree with the following statement? Women should have the same rights as men to apply for employment at all levels in government or business.					
Agree	75	70	70	67	67
Disagree	25	30	30	33	33
Which of the following statements comes closest to describing the role religion plays in your personal life?					
I am a very religious person. My faith directs my daily activities.	23	18	20	33	38

	Tunisia	Egypt	Lebanon	Iraq	Saudi Arabia
I am a moderately religious person. I try to balance the requirements of my faith with the pressures and requirements of my daily activities.	59	59	45	40	50
Religion plays very little role in most of my daily activities.	18	23	36	27	12
Looking forward to ten years from now, in which of the following areas would you most recommend young people prepare for employment? [Select all that apply]					
Civil service	3	7	11	7	16
Financial/banking services	29	24	30	31	34
Science/technology/innovation	87	74	57	66	60
Health care	43	22	8	22	27
Tourism	54	32	33	29	44
Education	8	24	10	22	15
Is your opinion of each of the following favourable or unfavourable?					
US					
Favourable	71	75	73	64	79
Unfavourable	29	25	27	36	21

	Tunisia	Egypt	Lebanon	Iraq	Saudi Arabia
UK					
Favourable	48	73	67	76	73
Unfavourable	52	27	33	24	27
France					
Favorable	77	57	76	56	42
Unfavourable	23	43	24	44	58
China					
Favourable	79	80	74	90	87
Unfavourable	21	20	26	10	13

When popular uprisings have occurred in several Arab countries, in your opinion, how important have each of the following been in creating the dissatisfaction that spurred them?

Government's lack of responsiveness to economic and social needs	75	75	69	75	79
Corruption and nepotism	82	84	81	79	83
Foreign intervention	41	45	51	37	74
Religious extremism and sectarianism	30	38	61	68	68

Percentages are an aggregate of responses of “very important” and “somewhat important” for each factor

Tunisia	Egypt	Lebanon	Iraq	Saudi Arabia
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Although there are a number of qualities that people feel children should learn, every person thinks that some are more important than others. On a scale of 1 to 5, where 1 is “most important” and 5 is “not important at all”, please rate each of the following based on how important it is for children to learn.

Religious education so that young people can be grounded in their tradition and faith	53	66	73	69	78
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Becoming equipped with technological skills so that young people can better compete in the economy of the future	94	78	74	78	85
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Percentages are an aggregate of responses of “1” and “2” for each quality

With which of the following countries would you most like your government to partner? [Select up to three]

1	China (53)	US (55)	US (50)	China (74)	US (66)
2	US (52)	China (41)	China (42)	US (37)	China (63)

Rank 1 and 2 shown

	Tunisia	Egypt	Lebanon	Iraq	Saudi Arabia
As you look to the future, which of the following issues are the most important for your government to prioritise?					
1	Jobs (69)	Jobs (42)	Jobs (49)	Jobs (66)	Jobs (64)
2	Health care (44)	Health care (41)	Religious extremism (34)	Political/ gov reform (38)	Health care (34)
3	Education (41)	Education (38)	Women's rights (33)	Education (28)	Military/ police (34)
4	Military/ police (24)	Women's rights (35)	Political/ gov reform (32)	Women's rights (26)	Traditional culture (30)
5	Political/ gov reform (24)	Traditional culture (29)	Health care (32)	Military/ police (23)	Education (30)
6	Traditional culture (22)	Civil rights (26)	Military/ police (31)	Health care (23)	Women's rights (27)
7	Women's rights (17)	Military/ police (22)	Promoting unity (23)	Religious extremism (18)	Civil rights (18)

	Tunisia	Egypt	Lebanon	Iraq	Saudi Arabia
8	Ending corruption (17)	Religious extremism (19)	Education (21)	Advancing democracy (18)	Advancing democracy (17)
9	Civil rights (15)	Advancing democracy (16)	Civil rights (17)	Traditional culture (18)	Political/ gov reform (14)
10	Promoting unity (12)	Ending corruption (15)	Traditional culture (11)	Civil rights (16)	Promoting unity (13)
11	Advancing democracy (9)	Promoting unity (10)	Ending corruption (10)	Ending corruption (13)	Ending corruption (11)
12	Religious extremism (6)	Political/ gov reform (8)	Advancing democracy (8)	Promoting unity (13)	Religious extremism (9)

Footnotes

1. ^ Sample size: 1,418 adults in the US (fieldwork: 22 to 23 March 2022); sample size: 1,780 adults in the UK (fieldwork: 18 to 20th March 2022); sample size: 1,065 adults in France (fieldwork: 25 to 28 March 2022); sample size: 2,005 adults in Germany (fieldwork: 22 to 24 March 2022).
 2. ^ Between 17 March and 7 April 2022, Zogby Research Services surveyed 4,856 adults in five Arab countries (Tunisia: 869; Egypt: 1,043; Lebanon: 857; Iraq: 1,044; and Saudi Arabia: 1,043).
 3. ^ Tony Blair Institute, Changing Values in the Middle East, Secular Swings and Liberal Leanings, September 2021_0.pdf
 4. ^ AYS-2021-WP_English-14-Oct-21-ABS-FINAL.pdf (arabyouthsurvey.com)
 5. ^ MAGNiTT – The Startup Data Platform for Emerging Venture MarketsMAGNiTT – The Startup Data Platform for Emerging Venture MarketsMAGNiTT – The Startup Data Platform for Emerging Venture Markets MAGNiTT – The Startup Data Platform for Emerging Venture Markets
 6. ^ Global Entrepreneurship MonitorAdult Population Survey Data
<https://www.gemconsortium.org/data/key-aps> Percentage of 18-64 population aged between 18 and 64 who agree with the statement that in their country, most people consider starting a business as a desirable career choice (Egypt, Morocco, Oman, Qatar, Saudi Arabia, Turkey and the United Arab Emirates).
 7. ^ <https://www.lloydsbanktrade.com/en/market-potential/bahrain/investment#:~:text=FDI%20inflows%20to%20West%20Asia,GDP%20ratios%20in%20the%20region>.
 8. ^ <https://www.weforum.org/agenda/2018/07/start-up-middle-east-arab-women-transforming-entrepreneurship/>
 9. ^ fs55-women-in-science-2019-en.pdf (unesco.org)
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