



Transatlantic Trends

Key Findings 2013

G | M | F

The German Marshall Fund
of the United States

STRENGTHENING TRANSATLANTIC COOPERATION



TRANSATLANTIC TRENDS

Transatlantic Trends 2013 Partners



LUSO-AMERICAN
FOUNDATION

Fundación **BBVA**



communitas
foundation





TABLE OF CONTENTS

<i>Foreword</i>	<i>iii</i>
<i>Executive Summary</i>	1
<i>Methodology</i>	8
<i>Section One: Transatlantic Relationship and Global Views</i>	9
Box: Europeans Less Confident in EU Economic Policy, Still Support Global Leadership	12
<i>Section Two: Economic Crisis, Europe, and Trade</i>	19
Box: Most Want to Cut Spending in General, Waver on Specifics	22
<i>Section Three: Transatlantic Security</i>	27
Box: Why is NATO Essential — And Why Not?	29
Box: Allies Divided on Whether to Maintain Troops in Afghanistan	34
Box: Sweden and NATO	36
<i>Section Four: Mobility, Migration, and Integration</i>	37
Box: Mediterranean Countries have Mixed Feelings on Immigration	43
<i>Section Five: Turkey</i>	45



Foreword

This is the 12th *Transatlantic Trends* survey; it started in 2002 as *World Views*. Over more than a decade, *Transatlantic Trends* has become the preeminent source of U.S. and European public opinion on a host of transatlantic issues, including foreign policy challenges, support for NATO, the economy, and the rise of other world powers. The data provided by the survey have become an invaluable tool for policymakers, the media, think tanks, and academics. In addition to producing original research, the survey's goal is also to foster debate on the strategic policy goals, objectives, and values of the United States and Europe as members of the transatlantic community.

The 12 years reflected by our polls have been tumultuous for both Europe and the United States, shaped for a long time by a marked divide about the U.S. intervention in Iraq, the alliance's role in Afghanistan,

and the global economic crisis. Increasingly, the poll also shows a deepening North-South divide within Europe — at a time when publics on both sides of the Atlantic appear to be drawing closer together again.

A chapter on mobility, migration, and integration was added to the survey this year, based on a previous survey, *Transatlantic Trends: Immigration*. As you will see in the data, it makes a compelling addition to the sections on foreign, security, and economic policy. It adds depth and diversity to the survey during a time of heightened interest in transatlantic relations in a globalized world.



Craig Kennedy

President, German Marshall Fund of the United States



Executive Summary

Over the past year, policymakers on both sides of the Atlantic have had to face grave economic and foreign policy challenges, heightened in a number of countries by the prospect of upcoming national elections. These challenges include the impact of more than half a decade of economic turmoil, concerns about the future of political revolutions in the Middle East and North Africa, Iran's nuclear program, preparations for NATO winding down its Afghan mission by 2014, and a steadily worsening civil war in Syria. *Transatlantic Trends* paints a picture of a complex relationship between the United States and Europe, and how each responds to global challenges.¹

In this context, the survey uncovered some significant findings. Four stand out particularly:

- Europeans expressed growing dissatisfaction with the European Union and the euro;
- widening divides emerged in Europe between successful and still-troubled economies;
- NATO's primary significance stemmed from its character as an alliance of democratic countries; and
- Turkey continues its steady shift towards foreign policy unilateralism.

Transatlantic Relations: As in previous years, majorities on both sides of the Atlantic held favorable views

of each other and felt positively about strong EU and U.S. leadership in world affairs. U.S. and European respondents also agreed that neither Russian nor Chinese leadership was desirable, and that China presents an economic threat to the transatlantic community. Americans and Europeans have also grown closer in their preferred responses to the threat posed by Iran. However, while European respondents said that the United States was more important to their national interests than Asia — as they have since 2011 — U.S. respondents described Asia as more important.

United States: Half of U.S. respondents approved of President Barack Obama's international policies, but disapproved of the government's handling of the economy. The majority of Americans still say that they have been personally affected by the economic crisis. At the same time, a stable majority favors further spending cuts.

European Union: While member states have remained supportive of the EU as a whole — strong majorities in Europe expressed favorable opinions of the EU and wanted it to play a significant role in global affairs — European respondents displayed a significantly reduced confidence in European economic governance. Large and growing majorities in Europe opposed EU control over member states' economic and budgetary policies, while respondents expressed growing negative feelings over the role the euro has played.

Leaders' Approval: Opinion of U.S. President Barack Obama remained high in Europe, despite significant drops in France and Spain, and almost

¹ This year's survey includes the United States, Turkey, and 11 European Union member states: France, Germany, Italy, the Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden, and the United Kingdom.

evenly divided in the United States. Many Europeans reported significantly more negative views of their own governments, however, particularly in France, Italy, Portugal, and Spain. German Chancellor Angela Merkel was less popular in Europe than last year, though still considerably more popular in her handling of the economic crisis in Europe than most domestic governments.

Economic Policy: Growing majorities on both sides of the Atlantic expressed dissatisfaction with their governments' economic policies, and said that their economic systems favored the interests of the few over basic fairness. While there was general support for cutting government spending, majorities wanted to maintain or increase spending on most individual domestic priorities.

Security Policy: Majorities in the United States and EU expressed their continued belief in the necessity of NATO, saying that its importance stemmed from its character as a community of democracies rather than its facilitation of burden-sharing or its role in protecting against military threats. Turkish respondents were still ambivalent, with many preferring to act alone in the future. There was a convergence, however, on how to address the challenge posed by Iran, with pluralities in the United States, EU, and Turkey favoring economic sanctions over other strategies. The transatlantic community was divided on drones: U.S. respondents strongly favored their use, while European and Turkish respondents were opposed.

Afghanistan and Syria: Majorities in the United States and EU — particularly in France, Germany, and Sweden — approved of their country contributing to a mission to train Afghan soldiers and police officers, though respondents in Turkey sharply disagreed. Respondents had no appetite for intervention in Syria, however; even more so than last year, the international consensus is against any sort of intervention.

Russia: Growing majorities on both sides of the Atlantic continue to find Russian leadership in international affairs undesirable, though U.S. respondents

were more divided. This coincided with an increasingly unfavorable view of Russia itself.

China/Asia: Asked for the first time whether they found Chinese leadership in global affairs desirable, majorities in the United States and Europe demurred. Again, this matched an increasingly less favorable opinion of China itself. Asked whether they thought “countries of Asia, such as China, Japan, and South Korea” were more important to their national interests than Europe, Americans were evenly split, while two-in-three Europeans preferred the United States. However, when given the choice between Europe and China, a majority of U.S. respondents chose Europe over China, while three-in-four Europeans chose the United States over China. As in previous years, respondents on both sides of the Atlantic saw China as an economic threat, while only Americans saw it as a military threat as well. Other rising powers like India, Brazil, and Indonesia were seen by majorities or pluralities as an economic opportunity rather than a threat.

Immigration: Concern over immigration was colored by concern over economic impact. Respondents in some (but only some) of the countries hit hardest by the crisis were generally more likely to say that they were worried about the role immigration plays in their societies. At the same time, majorities generally agreed that immigrants were integrating well, and that they only rarely detracted from a country's economy and culture.

Turkey: Turkish approval of U.S. and European leadership dropped last year, and majorities continue to view the United States and Europe unfavorably. Turks were ambivalent about their own government, but increasingly confident about their country's international stance.

Sweden: Sweden's third year in the survey revealed, as before, that the country's public opinion stood apart from other EU countries on a number of issues. Sweden remained more favorably disposed towards trade and foreign intervention, and Swedes expressed

less — though increased — pessimism about their economic position.

KEY FINDINGS OF THE SURVEY

Transatlantic Relations and Global Views

- A little more than half of EU respondents (55%) said it was desirable that the United States exert strong leadership in world affairs, almost unchanged from last year. Nearly three-in-four Europeans (70%) continued to hold favorable views of the United States, but views across Europe varied widely. Favorable opinion of the United States rose in Poland from 65% to 72%, but dropped several percentage points elsewhere in Europe — in Spain, for example, it dropped ten percentage points to 62%. Opinion of the United States remained low in Turkey, with unfavorable views going up seven percentage points to 64%.
- Fifty-seven percent of Americans (down six percentage points from last year) said it was desirable for the European Union to exercise strong leadership as well. Within the EU, support for EU leadership went up in the U.K. (by five percentage points to 60%), but down in France (by eight percentage points to 68%) and Spain (by 11 percentage points to 56%). Favorable opinion of the EU remained stable at 50% in the United States and 66% in Europe. Sixty-three percent of Turks felt EU leadership to be undesirable; 60% held an unfavorable view of the EU itself.
- A plurality of Americans (46%) viewed Russian global leadership as undesirable, as did two-in-three Europeans (65%) and 67% of Turkish respondents. Negative views of Russia were held by 59% of Americans, 62% of Europeans (up seven percentage points from 2012), and 68% of Turks.
- Asked for the first time about Chinese global leadership, a plurality of Americans (47%) said they found it undesirable, as did 65% of Europeans and 72% of Turks. Similarly, 58% of

U.S. respondents reported an unfavorable view of China, with 60% of Europeans and 63% of Turks agreeing.

- Asked whether they thought “countries of Asia, such as China, Japan, and South Korea” were more important to their national interests than Europe, Americans were evenly split (Asia: 45%; Europe: 44%). This was a reversal from last year, and a return to attitudes expressed in 2011. Meanwhile, two-in-three Europeans (64%) preferred the United States. However, when given the choice between Europe and China alone, a majority of U.S. respondents (53%) chose Europe over China, while three-in-four Europeans (71%) chose the United States over China. A plurality of Turks (39%), when asked to choose between the United States and “countries of Asia,” chose the latter; 27% chose the United States. When given a choice between the United States and China, however, 41% chose the United States, and 34% chose China.
- As in previous years, respondents on both sides of the Atlantic (United States: 62%; EU: 46%; Turkey: 41%) agreed that China is more of an economic threat than an opportunity. Forty-one percent of Europeans described China as an economic opportunity, with 28% of Americans and 31% of Turks agreeing. Only Americans (a plurality of 49%) see China as a military threat as well; a majority of Europeans (56%) and two-in-three Turks (60%) disagreed.
- Respondents were more optimistic about potential economic cooperation with rising non-Western powers. Sixty-four percent of Europeans thought that countries like India, Brazil, and Indonesia presented an economic opportunity — as did pluralities in the United States (48%) and Turkey (31%). The most enthusiastic support for cooperation was found in the Netherlands (73%), as well as in Spain, Germany, and Sweden (all 71%).

Economic Crisis, Europe, and Trade

- People continue to feel hurt by the economy. Stable majorities of Europeans (65%) and Americans (75%) continued to report that they were personally affected by the crisis. Numbers rose most sharply in France (up 12 percentage points to 65%), and in Poland (up seven percentage points to 60%).
- Four-in-five Europeans (82%), 68% of Americans, and 69% of Turks said that most of the benefits of their economic systems go to a few. Only 25% of Americans, 15% of Europeans, and 23% of Turks said that their system worked fairly for everyone. The highest degrees of perceived unfairness were registered in Italy (93%), Portugal (92%), Spain (91%), and Slovakia (88%).
- A majority of U.S. respondents (58%) supported government spending cuts to reduce debt; a plurality of Europeans (45%) agreed. Responses in Europe varied widely, however. Seventy percent in Portugal wanted to cut spending, while pluralities in Sweden (47%), Germany (43%), Poland (36%), the United Kingdom (38%), and Turkey (39%) wanted to maintain current spending. Only minorities wanted to increase government spending.
- However, faced with specific spending cut choices, respondents often preferred to maintain current spending or even increase it. Americans and Europeans were most open to defense cuts, with 46% on both sides of the Atlantic in support of maintaining current levels; 26% of Americans and 38% of Europeans were in favor of defense cuts. But majorities or pluralities in Europe wanted to increase spending on welfare; science, technology and education; and transportation and infrastructure, while majorities or pluralities in the United States wanted to maintain welfare and transportation and infrastructure spending while increasing science, technology, and education spending. Turkish respondents were the most in favor of ambitious government spending; a majority (50%) supported increased defense spending.
- Increasing majorities on both sides of the Atlantic (Americans: up 12 percentage points since 2012 to 64%; Europeans: up five percentage points since 2012 to 62%) disapproved of their governments' handling of economic policy. The increase in disapproval was sharpest in France (up 17 percentage points to 74%). Even in the two countries where majorities approved, rates dropped sharply: in Sweden by 15 percentage points to 74%, and in Germany by 12 percentage points to 56%. In Turkey, 52% disapproved of their governments' economic policy, a reversal from 2012.
- Europeans felt that German Chancellor Angela Merkel (47% approval) did a better job of handling the economic crisis than the EU (43% approval, with a plurality of 49% disapproving). The EU countries most affected by the crisis tended to register the highest disapproval rates of the EU's crisis management (Spain: 75%; France, Portugal, United Kingdom: 55%; Italy: 49%). But Merkel's disapproval ratings also rose sharply in the troubled economies — up to highs of 65% in Portugal and 82% in Spain.
- A majority of EU respondents (57%) considered membership in the EU to have been beneficial to their economies. But there were sharp differences across Europe, from Germany (71%) to the United Kingdom (40%), and some dramatic drops (down 20 percentage points in Portugal to 49%).
- Majorities in all but three European countries surveyed (EU average: 60%) said the euro had been (or, in non-member countries, would have been) bad for their economies. Only in Germany, Romania, and Slovakia did majorities or pluralities believe the euro had been good for their economies.

- However, few want to leave the euro. When asked whether their country should leave the eurozone, only minorities (the largest in Spain, at 30%) said they wanted to leave.
- Increasing majorities in Europe (68%, up 11 percentage points since last year) disapprove of EU control over national budgets; only 26% thought otherwise. In Germany, the only country where a majority wanted greater EU control over national budgets last year, that number dropped to 37% this year; 60% of Germans want member states to retain national control.
- Fifty-six percent of respondents in the EU and 49% of respondents in the United States said that increased transatlantic trade and investment would help their economies grow. Thirty-two percent in the EU and 39% in the United States said that increased trade and investment would render national economies more vulnerable. Turks were more skeptical, with a plurality (43%) saying this would make their economy more vulnerable.

Transatlantic Security

- Pluralities of Americans (33%), Europeans (42%), and Turks (40%) felt that their side of the transatlantic partnership in security and diplomatic affairs should take a more independent approach.
- NATO was seen as “still essential” by 58% of EU respondents and 55% of Americans.
- *Within the majority that felt NATO was still essential*, a majority in Europe (56%, 32% of the total sample) and a plurality in the United States (46%, 25% of the total sample) agreed that it remains essential because it is “an alliance of democratic countries that should act together.” Thirty percent of Turks, 12% of the total sample, agreed. Twenty-four percent of Americans, 13% of the total sample, said there are still major military threats endangering the United States; only 15% of Europeans, 9% of the total sample, and 23% of Turks, 9% of the total sample, agreed. Fifteen percent of Americans, 8% of the total sample, felt NATO helps share the costs of military action; 12% of Europeans (7% of the total) and 27% of Turks (11% of the total) agreed. Only 9% of Americans (5% of the total) agreed with the statement that “military actions are only legitimate if NATO supports them”; 13% of Europeans (7% of the total) and 15% of Turks (6% of the total) agreed.
- *Among the minority of respondents who no longer considered NATO to be essential for their country’s security*, a majority in the United States (52%, 17% of the total sample) and a plurality in Europe (35%, 12% of the total sample) said their own country “should be able to make its own military decisions.” Seventy percent of Turks, 27% of the total sample, agreed. Thirty-four percent of Europeans (11% of the total sample) said the EU should have its own defense organization. Thirty-two percent of Americans (10% of the total sample) agreed with the statement that Europe should take care of its own security. Ten percent of Americans (3% of the total) and 26% of Europeans (9% of the total) said that there were no major military threats endangering their own country. In Turkey, 21% — 8% of the total sample — agreed.
- NATO will end its combat mission in Afghanistan in 2014, but some troops may remain to train Afghan national army and police forces. When asked whether they approved of their own country contributing to such an effort, 54% of Americans said they did and 53% of Europeans agreed. A majority (51%) of Turks said they would disapprove of Turkey contributing troops.
- Asked whether they approved of unmanned aircraft (drones) being used to find and kill suspected enemies in places like Afghanistan

and Pakistan, 71% of U.S. respondents said they approved, while 53% of Europeans disagreed. In Turkey, 60% of respondents disapproved, while only 29% approved.

- When asked about defense spending, pluralities in the United States and Europe (both 46%) wanted to maintain current spending. Thirty-eight percent of Europeans wanted to decrease spending, as opposed to only 26% of Americans. In Turkey, a majority (50%) supported increasing defense spending, while 32% supported maintaining current spending levels.
- Regarding the Arab rebellions in the Middle East and North Africa, majorities in Europe (58%) and Turkey (57%) and a plurality in the United States (47%) preferred democracy over stability.
- Asked about the desirability of intervention in Syria, majorities in the EU (up 13 percentage points since 2012 to 72%), the United States (up seven percentage points to 62%), and Turkey (up 15 percentage points to 72%) said their countries should stay out of the Syria conflict completely.
- Transatlantic opinions about how best to prevent Iran from acquiring nuclear weapons have converged. A plurality of Americans (29%) preferred imposing economic sanctions. A plurality of Europeans (32%, up four percentage points) and Turks (27%, up 11 percentage points) agreed, a shift from previous years, when only the Europeans had tended to prefer offering economic incentives.
- *Transatlantic Trends* asked respondents for the first time how they wanted their country to address the existing North Korean nuclear program. Pluralities in America (30%) and Europe (29%) preferred the imposition of economic sanctions to any other option.
- On the general question of whether war is sometimes necessary to obtain justice, 68% of

Americans said that it is, while only 31% of Europeans agreed. This was a continuation of a well-established trend.

- The Swedes were evenly split on participating in NATO operations, with 47% supporting such operations and 49% against. However, when asked next how they felt if an operation was carried out with a mandate from the United Nations, 62% of Swedes said they would be in favor.

Mobility, Migration, and Integration

- When asked whether immigration is a problem or an opportunity, Americans were evenly split (problem: 47%, but down six percentage points from 2011; opportunity: 46%). Forty-four percent of Europeans saw immigration as more of a problem, with 41% seeing it as an opportunity. Fifty-four percent of Turks saw immigration as more of a problem; only 18% saw it as an opportunity.
- Majorities in the United States (73%, down from 82% in 2011) and Europe (69%) agreed that they were not worried about legal immigration. In contrast, 60% of Turks stated that they were worried about legal immigration.
- Sixty-one percent of Americans said they were worried about illegal immigration, joined by 71% of Europeans, and 69% of Turks.
- Almost all respondents overestimated the percentage share of immigrants in their countries.
- A plurality of Americans (41%) said there were “too many” immigrants in their country; 33% of Europeans agreed. A plurality of Europeans (39%) said there were “a lot but not too many” immigrants in their country; 39% of Americans concurred. In Turkey, a plurality of respondents (35%) said there were “not many” immigrants in their country.

- Majorities in the United States (61%) and Europe (52%) stated that first-generation immigrants were integrating well; however, majorities in Turkey (74%), Sweden (61%), and France (53%, up six percentage points from 2011), as well as a plurality in Germany (48%), said these immigrants were integrating poorly.
- Feelings about second-generation immigrants were much more positive. Sixty-eight percent of Americans thought they were integrating well, with 59% of Europeans concurring. Fifty-six percent of Turkish respondents thought that second-generation immigrants were integrating poorly.
- Publics on both sides of the Atlantic — 68% of Americans, 58% of Europeans, and 61% of Turks — were unhappy with their governments' management of immigration policy.
- Majorities in Turkey (70%) and the United States (50%) agreed that *"immigrants take jobs away from native born."* A majority in Europe (62%) disagreed.
- Two-thirds majorities in the United States (69%) and Europe (66%) agreed that *"immigrants generally help to fill jobs where there are shortages of workers."* Turkish views were more equally divided (agree: 52%; disagree: 43%).
- A majority of Americans (54%) and a plurality of Europeans (49%) agreed that *"immigrants help create jobs as they set up new businesses."*
- Majorities in the United States (57%) and Europe (50%) said that *"immigrants are a burden on social*

services." When asked whether *"immigrants are a threat to our national culture,"* however, two-thirds majorities in Europe (69%) and the United States (64%) disagreed.

- Asked whether *"immigrants enrich our culture,"* two-thirds majorities in the United States (69%) and Europe (60%) said that they do. Sixty-one percent of Turkish respondents disagreed.
- Two-thirds of U.S. respondents said emigration was not a problem for their country; 57% of Europeans said it was. Turks were evenly split between those who saw emigration as a problem (46%) and those who disagreed (45%).

Turkey

- Forty-four percent (down from 73% in 2004) of Turkish respondents still favored joining the European Union; 34% (up from 9% in 2004), said that it would be bad.
- Twenty percent of EU respondents said that Turkey's accession to the EU would be a good thing; 33% said it would be bad; 37% said it would be neither good nor bad.
- Thirty-eight percent of Turkish respondents said that Turkey should act independently on international matters; 21% said Turkey should cooperate with the EU.

METHODOLOGY

TNS Opinion was commissioned to conduct the survey using Computer Assisted Telephone Interviews in all countries except Poland, Slovakia, Romania, and Turkey, where lower telephone penetration necessitated the use of face-to-face interviews.

In all countries, a random sample of approximately 1,000 men and women, 18 years of age and older, was interviewed. Interviews were conducted primarily between June 3 and June 27, 2013; they were suspended for a week in Turkey, then resumed and were completed by July 2.

For results based on the national samples in each of the 13 countries surveyed, one can say with 95% confidence that the maximum margin of error attributable to sampling and other random effects is plus or minus three percentage points. For results based on the total European sample, the margin of error is plus or minus one percentage point. In addition to sampling error, question wording and practical difficulties in conducting surveys can also introduce error or bias into the findings of public opinion polls.

For trended questions first asked before 2010, averages were weighted on the basis of the size of the adult population in each country to maintain consistency with previous years' reports. For questions that started in 2010 or later, the results were also weighted so that the sample matches certain population characteristics, including age, gender, education, and region.

When processing is complete, data from the survey are deposited with the Inter-University Consortium for Political and Social Research at the University of Michigan (ICPSR), the Roper Center for Public Opinion Research at the University of Connecticut, and the GESIS-Leibniz Institute for the Social Sciences, and are available to scholars and other interested parties.

For more detailed methodology and topline data, as well as the full text of questions, please visit www.transatlantictrends.org.

Note on European Averages

Over time, additional European countries have been added to the survey. While the addition of new countries has affected the Europe-wide average, the impact has usually not been statistically significant. Therefore, for ease of presentation, we have treated several different averages as if they were part of one average. When the EU average is reported for previous years, this is based on the EU-7 average from 2002-2003, the EU-9 average from 2004-2006, the EU-10 average from 2007-2010, and the EU-11 average from 2011.

European Averages Reported

EU7	2002-2003	U.K., France, Germany, the Netherlands, Italy, Poland, and (2003) Portugal
EU9	2004-2006	EU7 countries plus Slovakia and Spain
EU11	2007-2010	EU9 countries plus Bulgaria and Romania
EU12	2011-2012	EU11 countries plus Sweden

Total Coverage

YEAR	TOTAL COVERAGE	EUROPEAN COVERAGE
2002	U.S. + E6	France, Germany, Italy, the Netherlands, Poland, U.K.
2003	U.S. + E7	France, Germany, Italy, the Netherlands, Poland, U.K., Portugal
2004-2005	U.S. + E10	France, Germany, Italy, the Netherlands, Poland, U.K., Portugal, Turkey, Slovakia, Spain
2006-2010	U.S. + E12	France, Germany, Italy, the Netherlands, Poland, U.K., Portugal, Turkey, Slovakia, Spain, Bulgaria, Romania
2011	U.S. + E13	France, Germany, Italy, the Netherlands, Poland, U.K., Portugal, Turkey, Slovakia, Spain, Bulgaria, Romania, Sweden
2012	U.S. + E13 + Russia	France, Germany, Italy, the Netherlands, Poland, U.K., Portugal, Turkey, Slovakia, Spain, Bulgaria, Romania, Sweden
2013	U.S. + E12	France, Germany, Italy, the Netherlands, Poland, U.K., Portugal, Turkey, Slovakia, Spain, Romania, Sweden



Section One: *Transatlantic Relationship and Global Views*

The continuing economic crisis on both sides of the Atlantic has not affected the stability of the connections linking the transatlantic community. It has continued to reinforce appreciation of the need for both U.S. and European leadership in the face of difficult global policy questions. The United States remains popular internationally, buoyed by continued European support for President Barack Obama, while Germany's leadership has earned admiration within the European Union. At the same time, the divergent responses of European countries that have been most affected by the crisis illustrate the growing tensions within Europe.

Americans and Europeans likewise find themselves challenged by the rise of non-Western powers. While the United States can afford to engage selectively with Russia, Europe, also increasingly skeptical of the Putin regime, has to engage more broadly. At the same time, the rise of China presents the transatlantic community with a continued challenge, and it remains unclear whether other rising powers like India, Brazil, and Indonesia, will work with the United States and Europe to address the challenges of global governance.

SUPPORT FOR UNITED STATES LEADERSHIP REMAINS STABLE...

International support for U.S. leadership remained stable, with 55% of Europeans and 77% of Americans describing a strong U.S. role as very or somewhat desirable (see Chart 1). While U.S. support for its own leadership decreased slightly from last year — dropping five percentage points from 82% — it still represents an overwhelming majority. Within Europe,

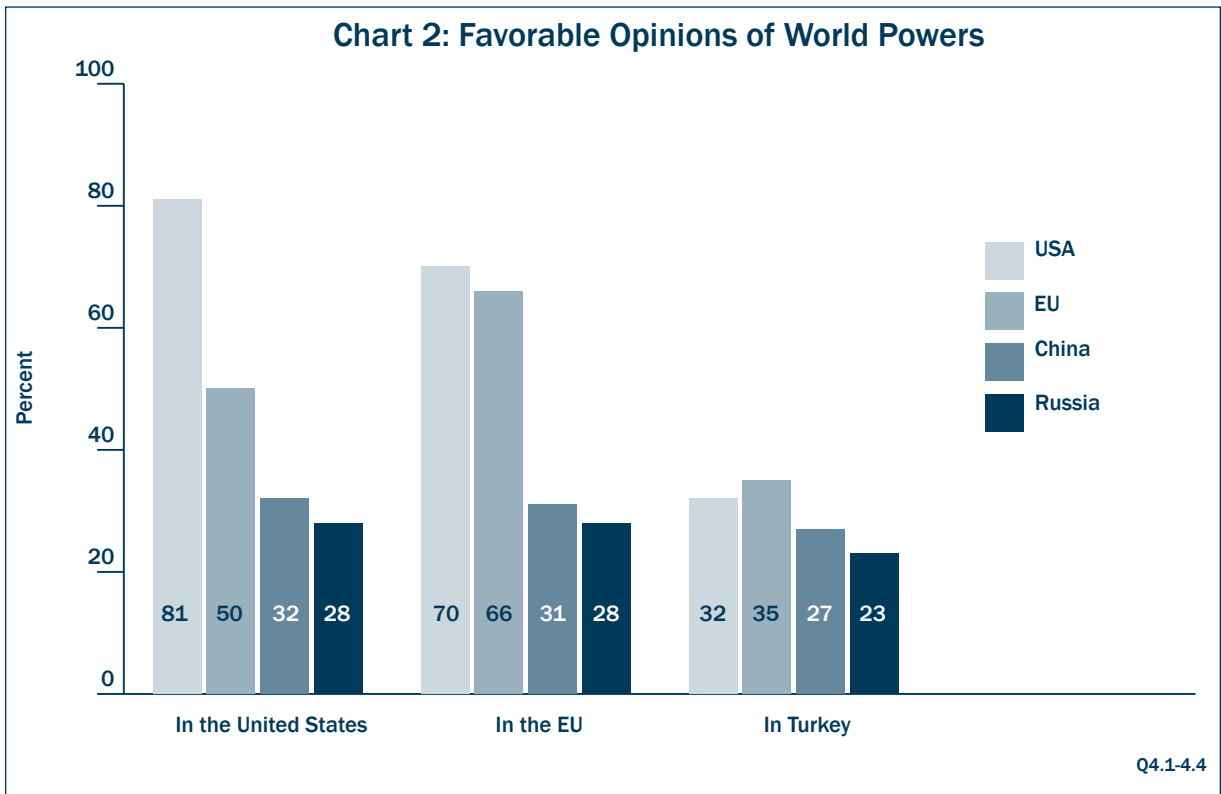
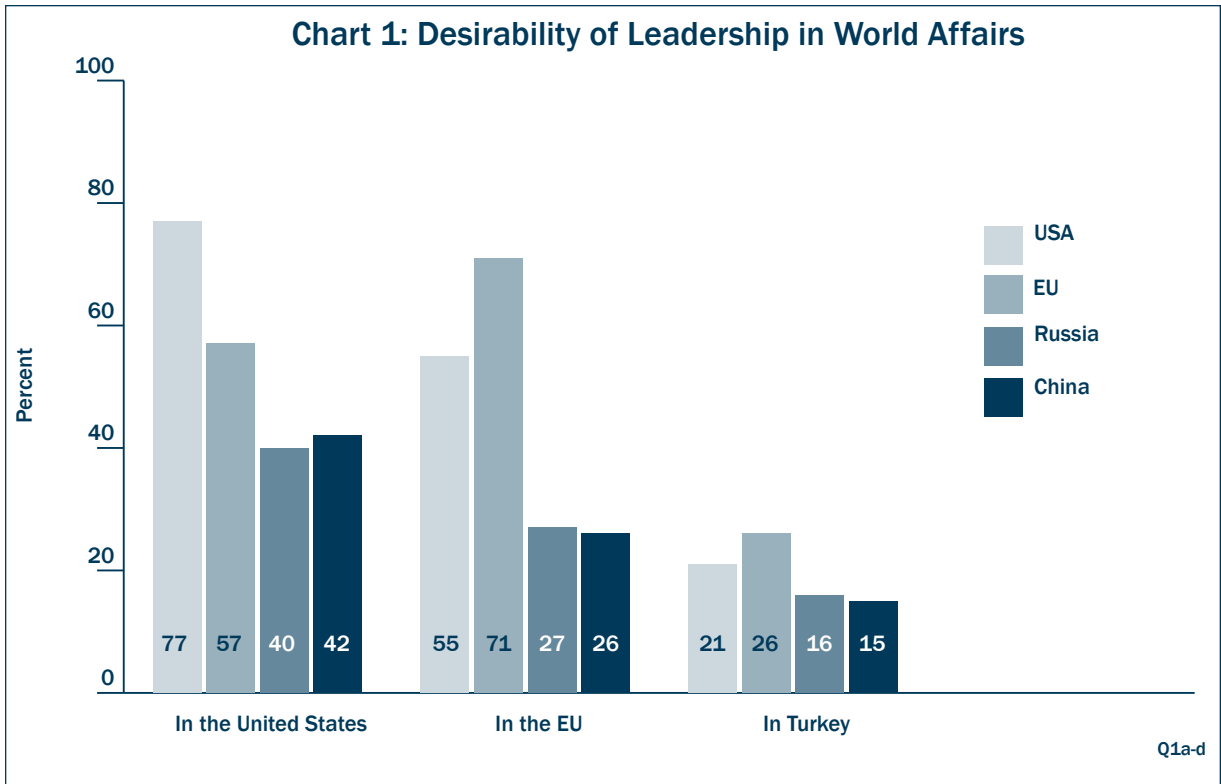
the only countries to shift significantly were Italy, Poland, and Spain, with support for U.S. leadership gaining in the first two (from 49% to 56% in Italy and 38% to 50% in Poland) and dropping in the third (from 39% to 30%). Spanish and Slovak respondents were the most likely in Europe to describe U.S. leadership as somewhat or very undesirable — 67% in Spain, up eight percentage points since last year, and 52% in Slovakia, down one percentage point since last year.

Turkish support for U.S. leadership dropped from an existing low. Twenty-one percent of Turks, down five percentage points from 2012, described strong U.S. leadership as very or somewhat desirable, while 69%, up ten percentage points from 2012, described it as somewhat or very undesirable.

... AS DOES FAVORABLE OPINION OF THE UNITED STATES

International favorability of the United States remained similarly stable. Seventy percent of respondents in the EU, down four percentage points from 2012, described their opinion of the United States as very or somewhat favorable, while 26%, up four percentage points since 2012, described their opinion of the country as somewhat or very unfavorable (see Chart 2). Positive opinion of the United States increased significantly in Poland (from 65% to 72%), while dropping in the Netherlands (from 78% to 69%), Romania (from 84% to 77%), Sweden (from 67% to 57%), Spain (from 72% to 62%), and the United Kingdom (from 76% to 67%).

Meanwhile, opinion of the United States remained low in Turkey, with the percent of Turks describing



the United States favorably declining from 34% to 32%, while those with unfavorable opinions rising from 57% to 64%.

SUPPORT FOR EU LEADERSHIP STRONG...

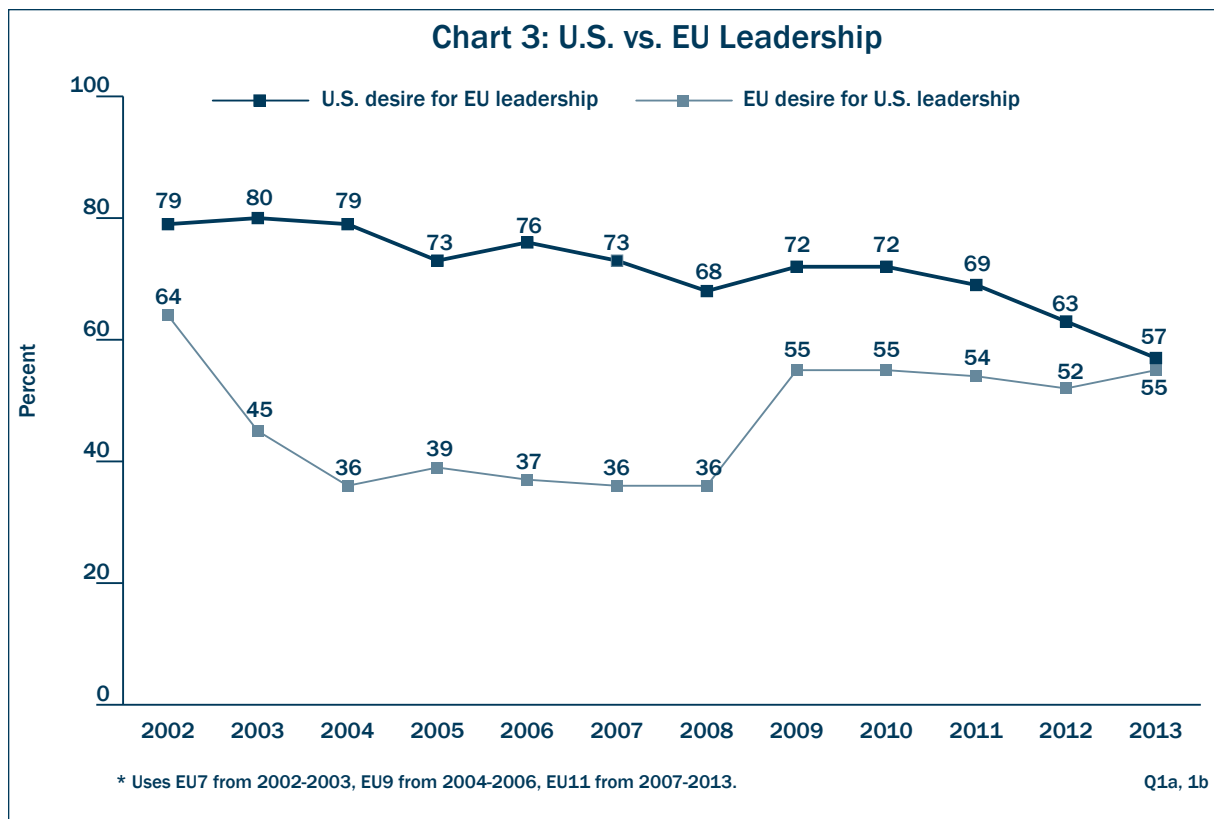
At the same time, support for EU leadership in world affairs remained strong. In the United States, 57% of respondents described strong EU leadership as very or somewhat desirable, down from 63% last year; 71% of Europeans responded similarly (see Chart 3). Within the EU, support for EU leadership went down in France (from 76% to 68%) and Spain (from 67% to 56%), while increasing in the U.K. (from 55% to 60%). The Spanish, British, and French were most likely to describe EU leadership as undesirable (42%, 31%, and 30%, respectively).

Turkish opinion differed here as well. Twenty-six percent of Turks described EU leadership as somewhat or very desirable, while 63%, up eight percentage points

from last year, described EU leadership as somewhat or very undesirable.

... AND OPINIONS OF THE EU ARE FAVORABLE

Respondents generally viewed the EU favorably. In Europe, 66% of respondents, down one percentage point from last year, viewed the EU very or somewhat favorably. The lowest favorability ratings were found in the U.K. (50%, up from 46% last year) and Spain (59%, down from 64% last year), while the highest were in Romania (77%, down from 84% in 2012), Poland (76%, up from 68%) and Germany (75%, unchanged since last year). British respondents were the most likely to view the EU unfavorably, with 44% (down from 49% in 2012) reporting that they viewed the EU somewhat or very unfavorably. Fifty percent of respondents in the United States, down from 57% last year, saw the EU favorably, while 33%, up from 31% last year, saw the EU unfavorably.



EUROPEANS LESS CONFIDENT IN EU ECONOMIC POLICY, STILL SUPPORT GLOBAL LEADERSHIP

While Europeans did not express greater concern about the economic crisis this year than they had in the past – 65% of respondents in the EU said they had been personally affected by the crisis, compared to 66% last year, while 34% said they had not been, compared to 33% last year – their confidence in EU economic governance was significantly diminished. Twenty-six percent of European respondents, down from 37% last year, said that the EU should have more authority over member states' economic and budgetary policy, while 68%, up from 57% last year, said that each member state should retain this authority for itself.

There were even greater shifts in individual countries. Twenty-one percent of Spanish respondents, down from 42% last year, wanted EU authority over national economic policy, as did 28% of Italian respondents (down 15 percentage points since 2012), 29% of French respondents (down 11 percentage points since 2012) and 37% of German respondents (down 16 percentage points since 2012). Europeans were also more likely to say that EU membership had been bad for their national economies, especially in the countries most affected by the crisis. Thirty-six percent of French respondents, up from 25% last year, said that their country's membership in the European Union had had a negative effect on their economy, as did 44% of Spanish respondents (up from 38% last year) and 42% of Portuguese respondents (up from 25% last year).

Despite diminished confidence in European economic governance, European respondents continued to take a positive view of Europe's role in global affairs. Seventy-one percent of European respondents said strong European leadership in world affairs was desirable (down only 5 percentage points since 2006). Europeans also retained a broadly favorable opinion of the EU, with 66% of respondents (down from 72% in 2009) describing the EU favorably.

Thirty-five percent of Turks saw the EU favorably, while 60%, up from 53% in 2012, saw the EU unfavorably.

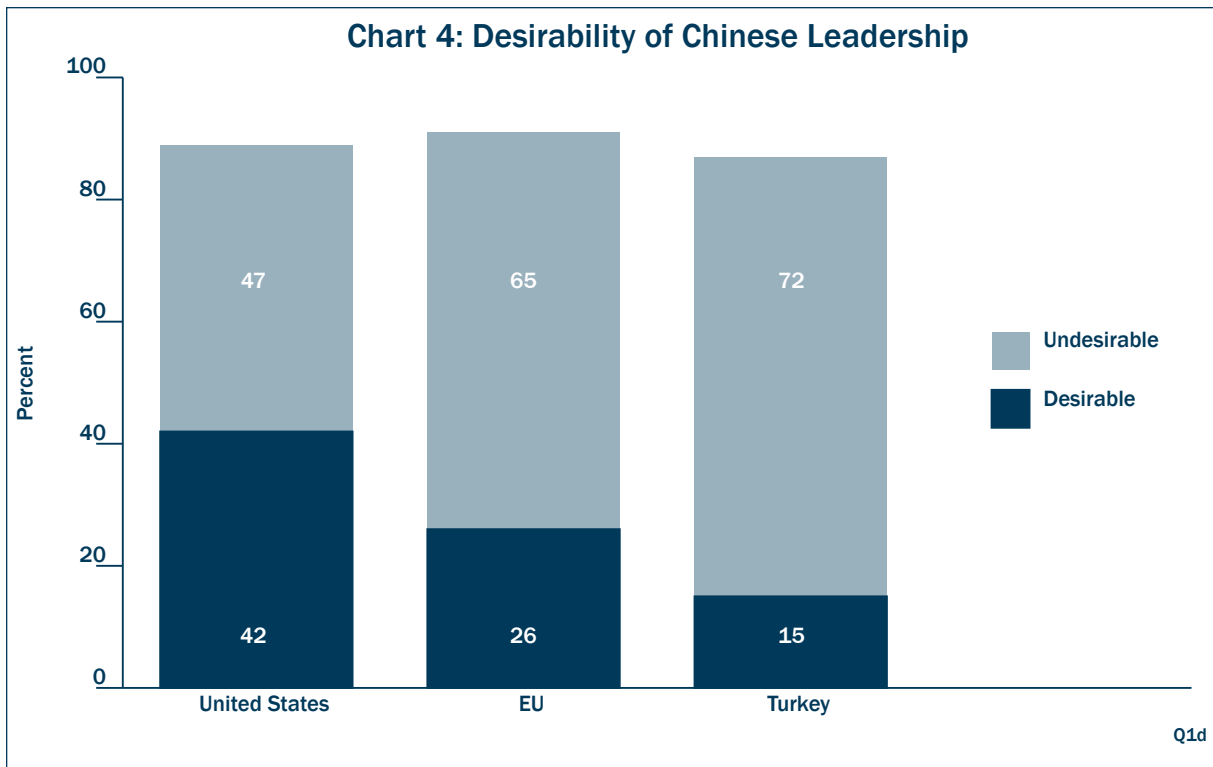
LITTLE APPETITE FOR RUSSIAN LEADERSHIP...

When asked about their feelings on Russia, 40% of U.S. respondents, down from 45% last year, viewed Russian leadership in world affairs as desirable, while 46% found it undesirable. Europeans were less divided. In the EU, 27% of respondents found Russian leadership desirable, compared to 25% in 2012. Sixty-five percent described it as undesirable. Here Turkey agreed. Sixteen percent of Turks described Russian leadership as desirable, while 67% described it as undesirable. Slovakia and the U.K. were the most likely to describe Russian leadership as desirable (39% and 38%, respectively), while Spain and Poland were most likely to describe it as undesirable (81% and 75%, respectively).

... AND UNFAVORABLE VIEWS OF RUSSIA ITSELF

Similarly, most countries polled had negative views of Russia in general. Twenty-eight percent of respondents in the EU, down from 37% last year, expressed favorable feelings about Russia, while 62%, up from 55% last year, expressed unfavorable feelings. Slovaks were the most likely to view Russia favorably (58%, down six percentage points since 2012), while Sweden and Germany were most likely to view Russia unfavorably (76% and 74%, respectively). U.S. results were almost identical. Twenty-eight percent of Americans, down fourteen percentage points from last year, expressed favorable views of Russia, while 59%, up eleven percentage points from last year, expressed unfavorable views.

Turks agreed here as well. Twenty-three percent of Turks, down from 32% in 2012, viewed Russia favorably, while 68%, up from 53% in 2012, viewed Russia unfavorably.



FEW WANT CHINESE LEADERSHIP...

Respondents expressed similar views when asked about China. Forty-two percent of Americans found Chinese leadership in world affairs desirable, while 47% found it undesirable. In the EU, 26% of respondents found Chinese leadership desirable, while 65% found it undesirable (see Chart 4). The U.K. was the most likely to look positively on Chinese leadership, generally resembling U.S. opinion: 42% of British respondents found Chinese leadership desirable, while 43% found it undesirable. Spain, Slovakia, Italy, and France were the most likely to find Chinese leadership undesirable (83%, 77%, 71% and 71%, respectively).

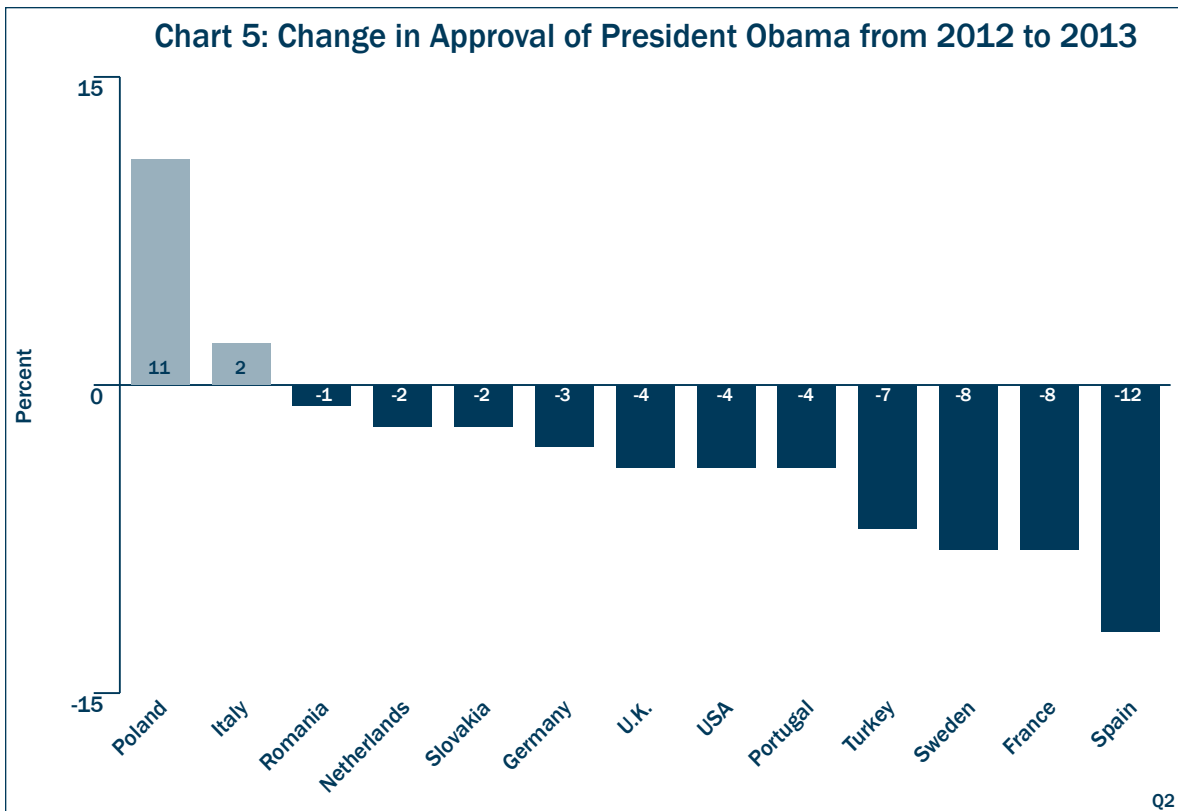
Turkey viewed Chinese leadership even more negatively than did Europe: 15% of Turks found Chinese leadership desirable, while 72% found it undesirable.

... MATCHING UNFAVORABLE VIEWS OF CHINA ITSELF

Thirty-one percent of Europeans, down ten percentage points from last year, viewed China very or

somewhat favorably, while 60%, up from 50% last year, viewed China very or somewhat unfavorably. Within Europe, some shifts were even more dramatic. Opinion of China dropped 17 percentage points in Romania, with 62% reporting favorable views last year and 45% this year; 15 percentage points in Portugal, from 48% to 33%; and 14 percentage points in Spain (from 48% to 34%) and the Netherlands (from 50% to 36%). German and Italian respondents were most likely to report somewhat or very unfavorable opinions of China, at 71% and 70%, respectively. In the United States, 32% of respondents, down nine percentage points since 2012, reported favorable views of China, while 58% of respondents, up six percentage points since 2012, reported unfavorable views.

In Turkey, 27% of respondents, down 12 percentage points since 2012, reported favorable views; 63%, up 18 percentage points since last year, reported unfavorable views.



PRESIDENT OBAMA REMAINS MORE POPULAR ABROAD THAN AT HOME

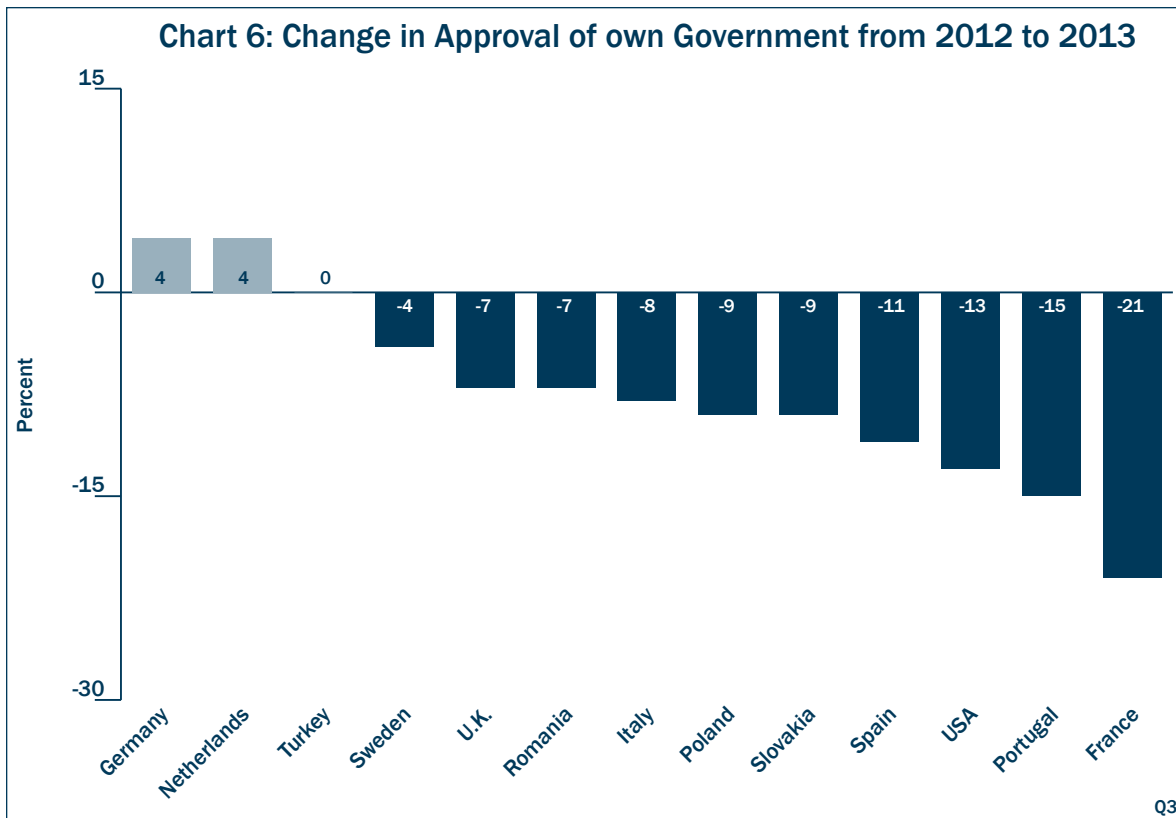
President Barack Obama’s support in the United States remained steady, if lukewarm: 50% of respondents approved of his international policies, down four percentage points from last year and seven percentage points from 2009. Forty-four percent disapproved, two percentage points higher than last year and nine percentage points higher than in 2009. Meanwhile, in Europe, 69% of respondents approved of his international policies, down two percentage points from last year and 14 percentage points from 2009 (see Chart 5). Twenty-one percent disapproved, down one point from last year but up 13 percentage points since 2009. Within Europe, the Netherlands, Italy, and Germany were the most enthusiastic in their support, with 77%, 76%, and 76%, respectively, expressing approval. Disapproval was highest in Spain (31%), Slovakia (31%), and Sweden (27%).

In Turkey, 35% of respondents approved of Obama’s international policies, down seven percentage points

from last year but up seven points from a low in 2010. Fifty-three percent disapproved, up ten percentage points from last year but down five percentage points since 2010.

ENTHUSIASM FOR DOMESTIC GOVERNMENTS SAGS

In the meantime, many in Europe had mixed feelings with regard to their own governments’ handling of international policies. Fifty percent approved, down seven percentage points from last year, while 45% disapproved, up seven percentage points from last year (see Chart 6). German, Swedish, and Dutch respondents were most likely to approve of their governments’ handling of international policies, at 77%, 70%, and 61%, respectively; Spanish and Polish respondents were the least likely, at 27% and 38%, respectively. Spanish respondents were also the most likely to express disapproval: 70% of Spaniards, up 11 percentage points from last year, said that they disap-



proved somewhat or very much of their governments' handling of international policies.

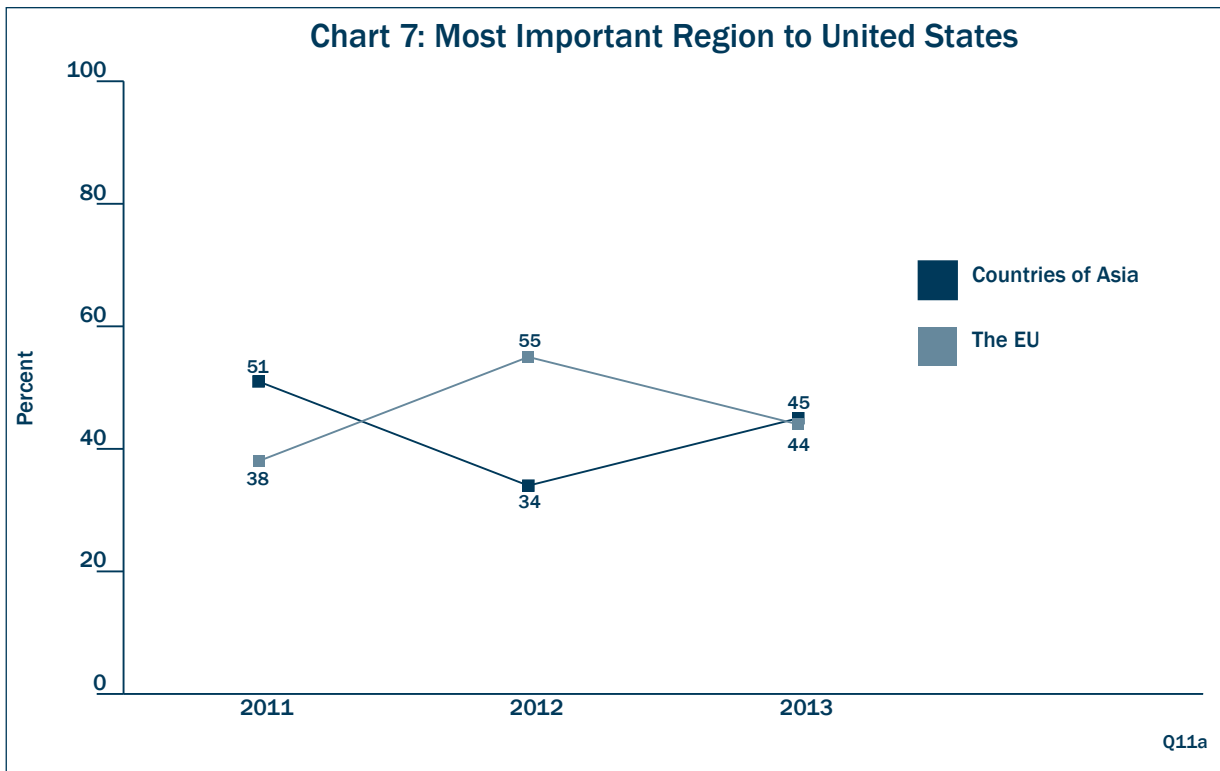
In Turkey, 51% of respondents approved of their government's handling of international policies, as they did in 2012; 42%, up three percentage points from last year, disapproved.

UNITED STATES LOOKS TO ASIA (AGAIN), EUROPE LOOKS TO UNITED STATES

In a shift, respondents in the United States said that they viewed Asia — defined as “countries...such as China, Japan, and South Korea” — as more important to U.S. national interests than countries of the European Union, a reversal of last year's result and a return to attitudes first expressed in the 2011 survey. Forty-five percent described Asia as more important, up 11 percentage points from last year, while 44%, down 11 percentage points from last year, described Europe as more important (see Chart 7).

At the same time, Europe remained firm in its emphasis on the United States over Asia: 64% of Europeans, up three percentage points since last year, described the United States as more important, while 27%, down two percentage points since last year, described Asia as more important. Within Europe, countries most likely to describe the United States as more important were the U.K. (70%), France (69%), and Romania (69%). Forty-one percent of Spanish respondents described Asia as more important, as did 37% of Swedish respondents.

Twenty-seven percent of respondents in Turkey, down two percentage points from last year, described the United States as more important. Thirty-nine percent described Asia as more important, down seven percentage points from last year.



...BUT WHEN ASIA FOCUS IS ON CHINA ALONE, UNITED STATES AND EUROPE PREFER EACH OTHER

When the question was phrased differently, however, and respondents were asked if China — as opposed to “the countries of Asia, such as China, Japan, and South Korea” — was more important, responses shifted dramatically. Americans said that countries of the European Union were more important than China (53%), while Europeans became even more likely to describe their relationship with the United States as more important (71%). Within Europe, Germany and the U.K. were the most likely to describe the United States as more important (82% and 75%, respectively); Portugal and Spain were the least (52% and 60%, respectively).

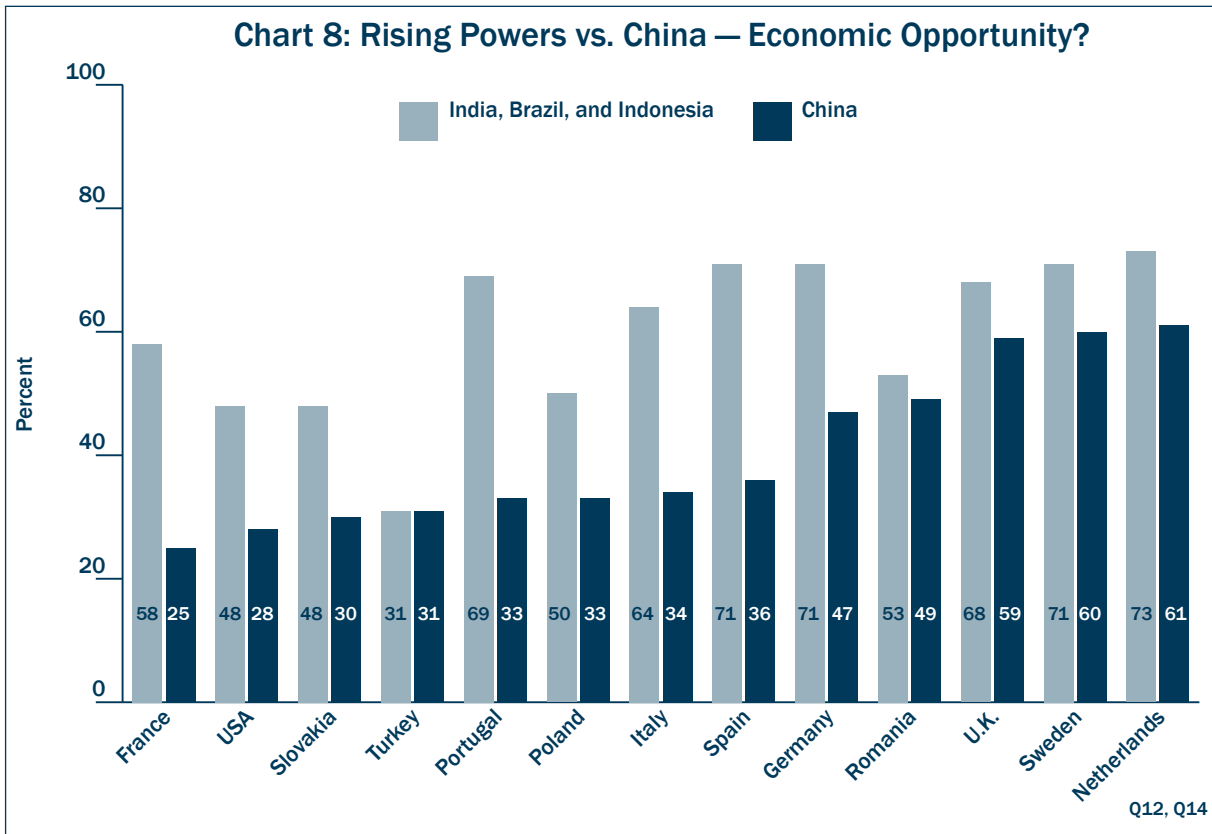
Turkish respondents were almost evenly divided when asked to choose between China and the United States. Forty-one percent described the United States as more important, while 34% described China as more important.

BOTH SIDES OF THE ATLANTIC VIEW CHINA AS ECONOMIC THREAT, BUT ONLY THE UNITED STATES ALSO SEES A MILITARY THREAT

Europeans, Americans, and Turks agreed (though to varying extents) that China represented more of an economic threat than an economic opportunity, a response that has remained relatively stable for the past three years. Forty-six percent of Europeans, up one point from last year, described China as more of an economic threat, as did 62% of Americans, up from 59% in 2012, and 41% of Turks, up from 39%. Forty-one percent of Europeans described China as an economic opportunity, as in 2012, while 28% of Americans (down two percentage points since 2012) and 31% of Turks (down one percentage point since 2012) agreed.

However, responses varied within Europe, often breaking along an increasingly stark North-South divide. While majorities in France, Portugal, and Spain — 65%, 56%, and 56%, respectively — described China as more of an economic threat, 61% of respondents in the Netherlands, 60% of respon-

Chart 8: Rising Powers vs. China — Economic Opportunity?



dents in Sweden, and 59% of respondents in the U.K. described China as more of an economic opportunity.

When asked if China posed a military threat, the transatlantic community was more divided. While a plurality of Americans (49%, down from 51% in 2012) described China as a military threat, a majority of Europeans (56%, up from 53% in 2012) disagreed. Further, while intensity of opinion varied between European nations, there was no country where a majority or plurality disagreed with the European consensus: Romania and the Netherlands were the most likely to say that China did not pose a military threat (66% and 64%, respectively), while Poland was the least (43%, versus 41% who disagreed). In Turkey, 60% of respondents said that China did not pose a military threat (up five percentage points since last year), while 21% said that it did (down three percentage points since last year).

TRANSATLANTIC COMMUNITY SEES ECONOMIC OPPORTUNITY IN OTHER RISING NATIONS

In contrast to their anxiety about the economic threat posed by China, respondents were optimistic about potential economic cooperation with other rising powers. When asked whether countries like India, Brazil, and Indonesia pose more of an opportunity for new markets and investment or more of a threat to our jobs and prosperity, two-in-three Europeans (64%) said that they presented more of an opportunity, while 23% of Europeans disagreed. Within Europe, some countries were even more enthusiastic. Seventy-three percent of respondents in the Netherlands and 71% in Spain, Germany, and Sweden said that rising powers presented an opportunity (see Chart 8). French respondents were the most likely in Europe to say that rising powers presented more of a threat (32%).

U.S. and Turkish respondents were less enthusiastic. Forty-eight percent of U.S. respondents said that

the rising powers present an opportunity, while 43% said they represent a threat. Turkish respondents were even less certain. Thirty-one percent said that the rising powers present an opportunity, while 27% disagreed.



Section Two: Economic Crisis, Europe, and Trade

The economic crisis in the United States and Europe, despite some green shoots in the United States and several cases of successful austerity reform in Europe, continues to threaten economic stability on both sides of the Atlantic. It has led to a transatlantic dialogue on the role of governments and the future of the European project, and forced questions of spending, social priorities, and international cooperation to the forefront. Greece, Portugal, Italy, and Spain have remained the epicenters of the crisis in Europe, while dissatisfaction with Europe in Great Britain is clearly on the rise.

This year's survey probed attitudes towards spending, austerity, European cooperation, and equality, and asked respondents for their first impressions of a potential transatlantic trade initiative.

STABLE MAJORITIES AFFECTED BY ECONOMIC CRISIS

When asked if they had been personally affected by the economic crisis, Europeans and Americans overwhelmingly reported that they had. Sixty-five percent in Europe, down from 66% in 2012 but up from 55% in 2009, said that they or their families had been greatly or somewhat affected, while 75% in the United States — down from 79% in 2012 but almost unchanged since 2009 (74%) — responded similarly (see Chart 9). Further, while responses in some countries remained virtually unchanged (90% reported having been affected in Portugal, up from 89% last year; 89% had been affected in Romania, up from 88% last year; 82% had been affected in Spain, up from 80% last year), others shifted dramatically. Sixty-five percent of French respondents reported

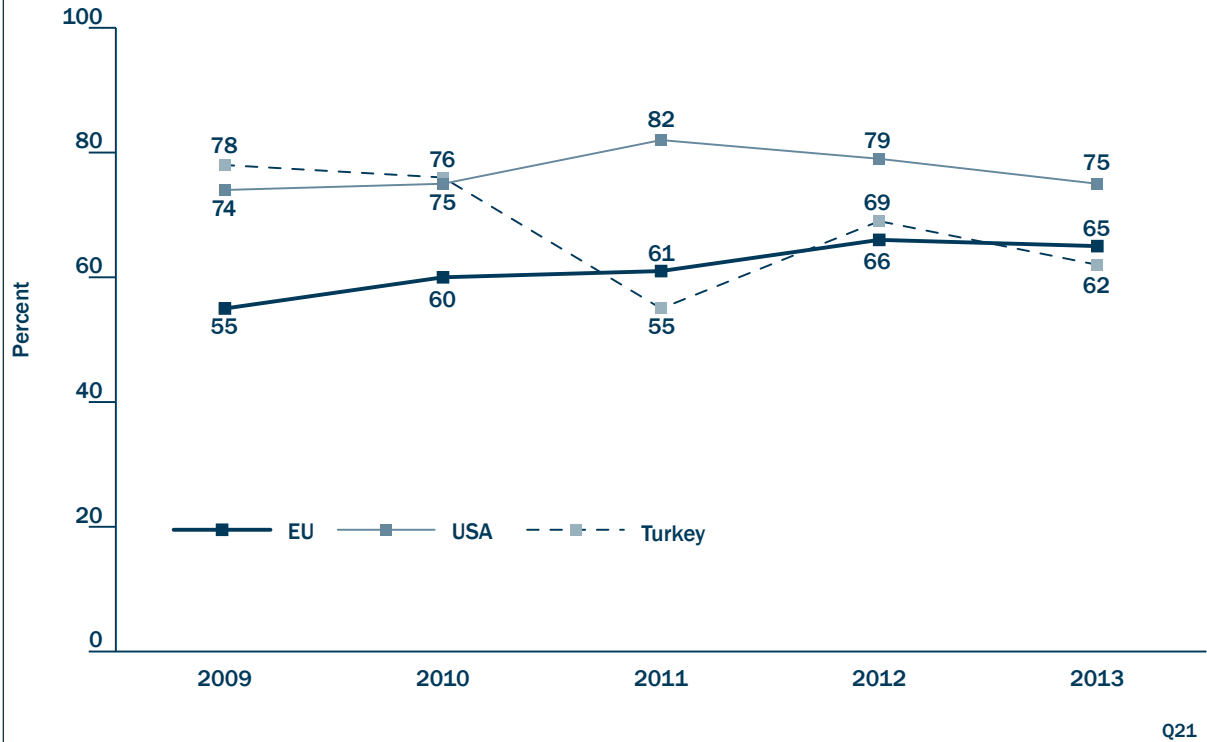
having been affected, up from 53% last year, as did 60% of Polish respondents, up from 53% last year. The only country in which significantly fewer respondents reported having been affected was Sweden, where 29% of respondents, down seven percentage points since last year, were greatly or somewhat affected. Swedish and German respondents were most likely to say that they had not really been affected or not affected at all (70% and 56%, respectively).

Turkey's response, as in previous years, hovered around the European average. Sixty-two percent of Turks, down seven percentage points since 2012, reported having been greatly or somewhat affected, while 33% of respondents, up six percentage points since 2012, said they had not been affected.

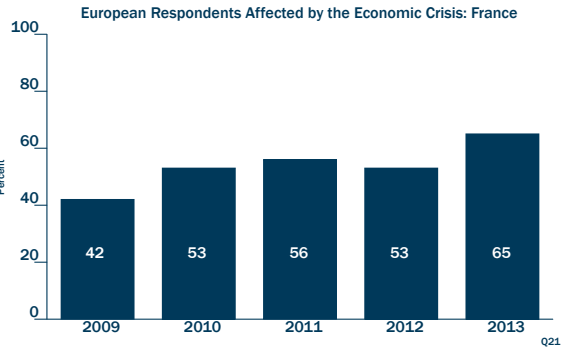
OVERWHELMING MAJORITIES LOSE FAITH IN ECONOMIC FAIRNESS

In Europe, the United States, and Turkey, large majorities believe that their economic system disproportionately rewards the few at the expense of the many. Sixty-eight percent of Americans, 82% of Europeans, and 69% of Turks said that most of the benefits of their economic system go to a few, while 25% of Americans, 15% of Europeans, and 23% of Turks said that their economic system works fairly for everybody. Within Europe, a number of countries approached unanimity. Ninety-three percent of respondents in Italy, up from 89% in 2012, said that their economic system rewards the few, as did 92% in Portugal (up from 90% in 2012), 91% in Spain (up from 82% in 2012), and 88% in Slovakia (up from 85% in 2012) (see Chart 10). The respondents most likely to believe that their system worked fairly for

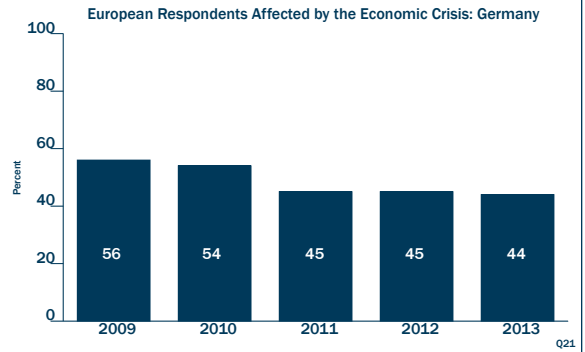
Chart 9: Respondents Affected by the Economic Crisis



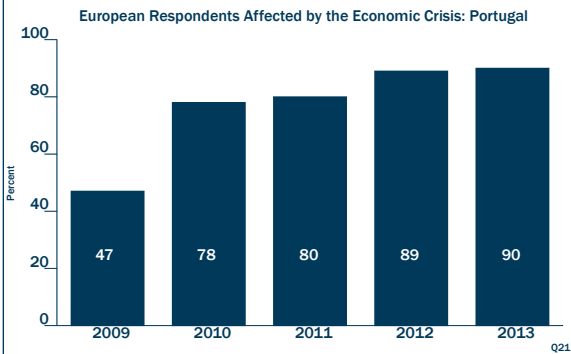
Q21



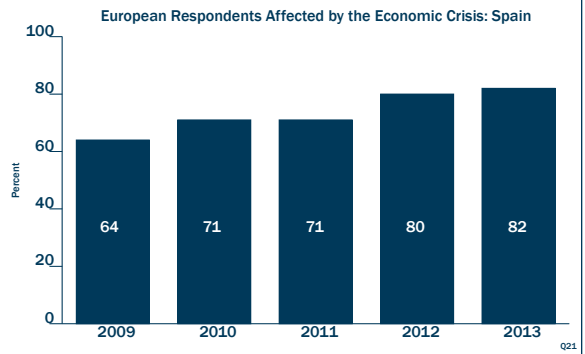
Q21



Q21



Q21



Q21

everyone were Dutch (35%), Swedish (34%), and American (25%).

Turkey was the only country in which a significantly greater number of people believed in the fairness of their system this year. Twenty-three percent of Turks responded that their system was basically fair, versus 16% in 2012.

INCREASING DISAPPROVAL OF GOVERNMENTS' ECONOMIC POLICY

Nearly every country surveyed reported broad disapproval of its government's handling of the economy, with most expressing even greater dissatisfaction than last year. In Europe, 34% of respondents approved of their government's handling of the economy, down from 41% in 2012, while 62% disapproved, up from 57% in 2012. Individual countries saw even sharper drops. Seventy-four percent of French respondents, up from 57% last year, disapproved of their government's handling of the economy, as did 66% of Dutch

respondents (up from 52% last year) and 75% of Polish respondents (up from 65% last year). Spanish, Polish, and French respondents were the least likely to approve of their government's handling of the economy, at 18%, 23%, and 23%, respectively (see Chart 12).

In the United States, 32% (down 14 percentage points) of respondents were satisfied with their government's handling of the economy while 64% (up 12 percentage points) were dissatisfied.

German respondents expressed mixed approval, with 56% saying that they approved of their government's handling of economic policy (down from 68% in 2012) and 41% saying they disapproved (up from 31% in 2012), while 59% of Swedish respondents approved (down from 74% in 2012) and 38% disapproved (up from 24% in 2012).

In Turkey, 43% of respondents approved of their government's handling of the economy, while 52%

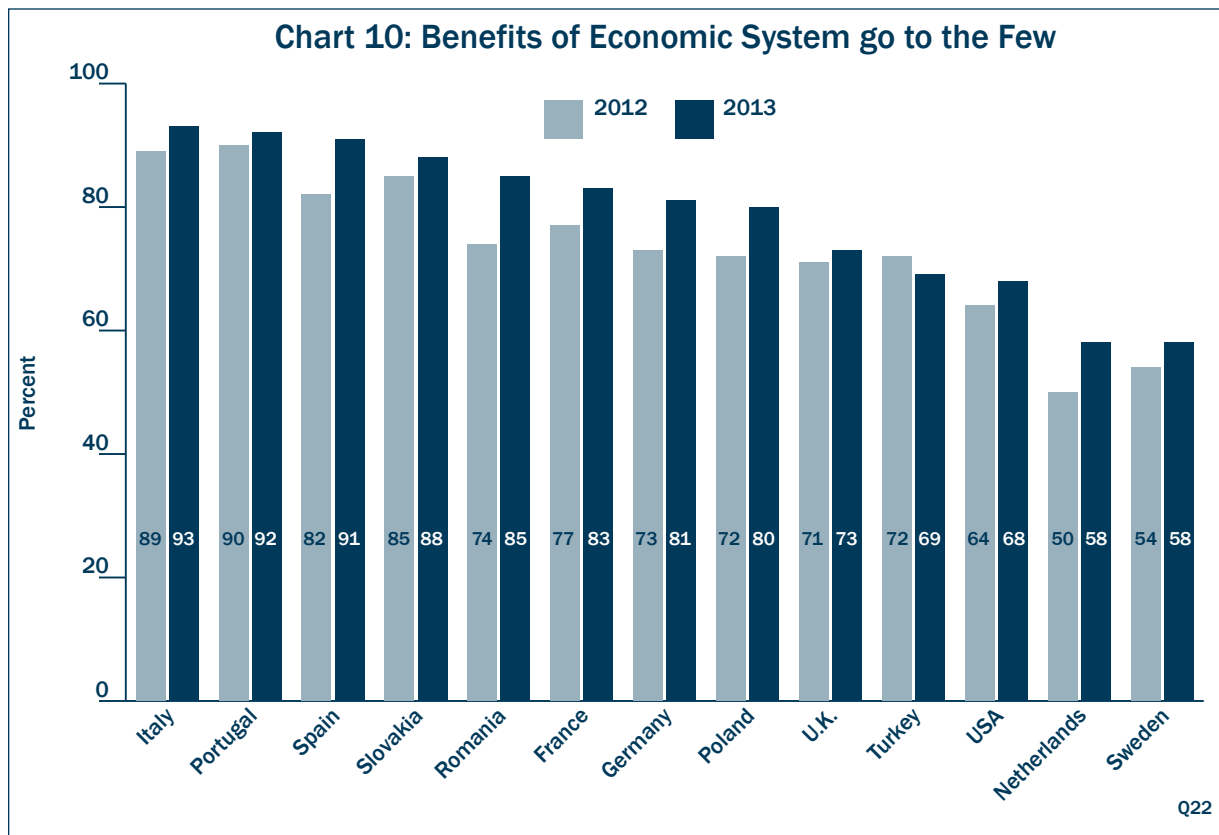
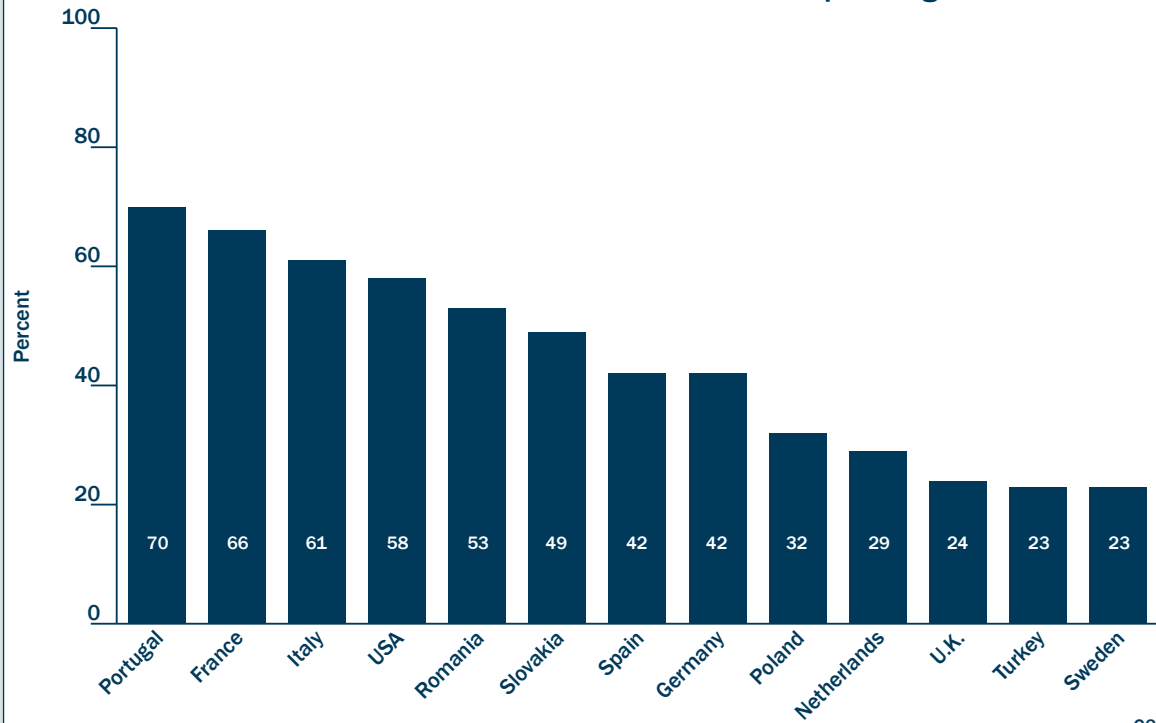


Chart 11: Decrease Government Spending



Q24

MOST WANT TO CUT SPENDING IN GENERAL, WAVER ON SPECIFICS

Fifty-eight percent of Americans, unchanged since last year, wanted to cut government spending to reduce debt, versus 22% who wanted to maintain current levels and 15% who wanted to increase spending. Europeans responded similarly: a plurality (45%, down five percentage points since last year) wanted to cut spending, while 30% wanted to maintain current levels and 19% wanted increases.

However, within Europe, national responses varied widely. Seventy percent of respondents in Portugal, 66% in France, and 61% in Italy wanted to cut spending, while pluralities in Sweden (47%), Germany (43%), the Netherlands (37%), Poland (36%), and the United Kingdom (38%) wanted to maintain current levels, and significant minorities in the United Kingdom (34%), the Netherlands (30%), and Spain (28%) wanted to increase government spending (see Chart 11).

Turkish respondents shifted most dramatically. While the plurality wanted to maintain current spending levels (39%, down six percentage points since 2012), those in favor of increasing spending grew 16 percentage points from 2012, going from 11% to 27% and outnumbering those in favoring of cutting (23%).

When asked about specific cuts to defense spending, welfare state programs, science and education and infrastructure, though, respondents supported much more modest pruning, often preferring, in fact, to maintain or increase spending on individual programs.

Americans and Europeans were most amenable to defense cuts. In both the United States and the European Union, 46% of respondents supported maintaining spending, while 26% of U.S. respondents and 38%

of European respondents supported cutting. Only 25% and 14% of respondents, respectively, supported increasing spending.

Majorities or pluralities wanted to increase or maintain spending in nearly every other area. Forty-three percent of European respondents wanted to increase welfare spending, while 46% of U.S. respondents wanted to maintain the current level of welfare spending.¹ Sixty-eight percent of European respondents and 61% of U.S. respondents wanted to increase spending on science, technology, and education. Forty-three percent of European respondents and 39% of U.S. respondents wanted to increase spending on transportation and infrastructure, versus 41% and 40%, respectively, who wanted to maintain current levels.

Turkey stands out here as the exception. While Turkish respondents viewed science and technology spending similarly to their U.S. and European counterparts – 66% wanted to increase spending, versus 23% who would maintain current levels and 7% who would cut – they wanted much more ambitious spending in other areas. Fifty-nine percent of Turkish respondents wanted to increase spending on welfare state programs, while 62% of Turkish respondents wanted to increase spending on transportation and infrastructure. Perhaps most notably, 50% of Turkish respondents wanted increased defense spending, versus 32% who wanted to maintain current levels and 15% who wanted cuts.



1 The wording used in the U.S. survey was “social security and medicare.”

disapproved — a reversal from 2012, when 55% approved and 38% disapproved.

CHANCELLOR MERKEL HANDLED ECONOMIC CRISIS BETTER THAN EU, MAJORITIES SAY

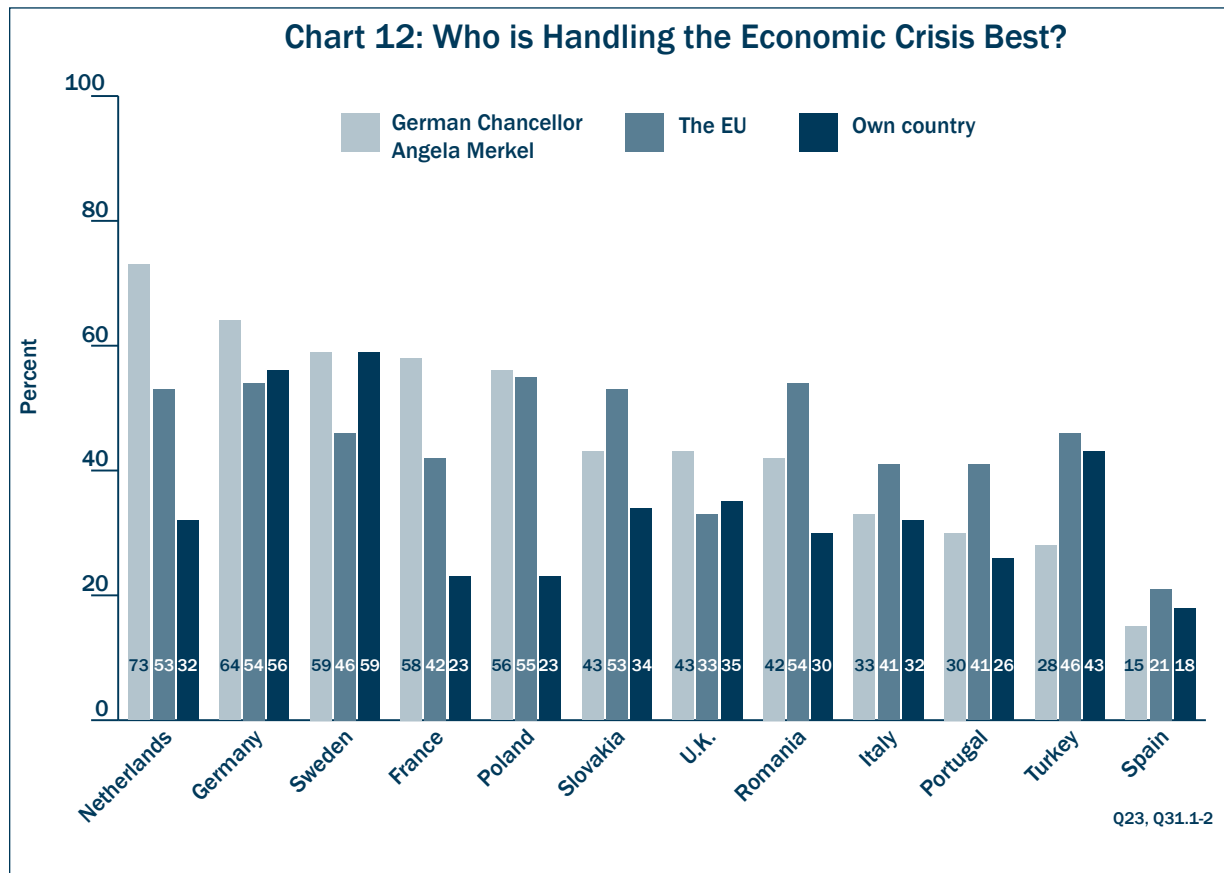
When asked their opinion of the EU’s handling of the economic crisis, 43% of European respondents approved, while 49% disapproved. The countries least affected by the crisis were most positive: majorities in Germany (54%), the Netherlands (53%), and Poland (55%) approved, while majorities or pluralities in France (55%), Italy (49%), Portugal (55%), and Spain (75%) disapproved. In the United Kingdom, 33% approved while 55% disapproved.

Europeans were more confident in the leadership of German Chancellor Angela Merkel, with 47% saying that they approved of her handling of the economic crisis while 42% disapproved. However, these numbers varied drastically between countries:

in the Netherlands, Germany, Sweden, and France, broad majorities approved (73%, 64%, 59%, and 58%, respectively), while the three countries most affected by the crisis — Spain, Portugal, and Italy — voiced strong disapproval (82%, 65%, and 58%, respectively) (see Chart 12).

MOST STILL BELIEVE EU MEMBERSHIP HAS BEEN BENEFICIAL; FEWER BELIEVE IN BENEFITS OF EURO

Fifty-seven percent (down four percentage points since 2012, but down ten since 2011) of European respondents, said that, overall, EU membership had been good for their economy, while 34% (up three percentage points since 2012), said that it had been bad. Again, a few countries diverged sharply from the average. While 71% of Germans, 66% of Poles, 62% of Slovaks, and 61% of Romanians said that it has been good, only 40% of British respondents, 48% of



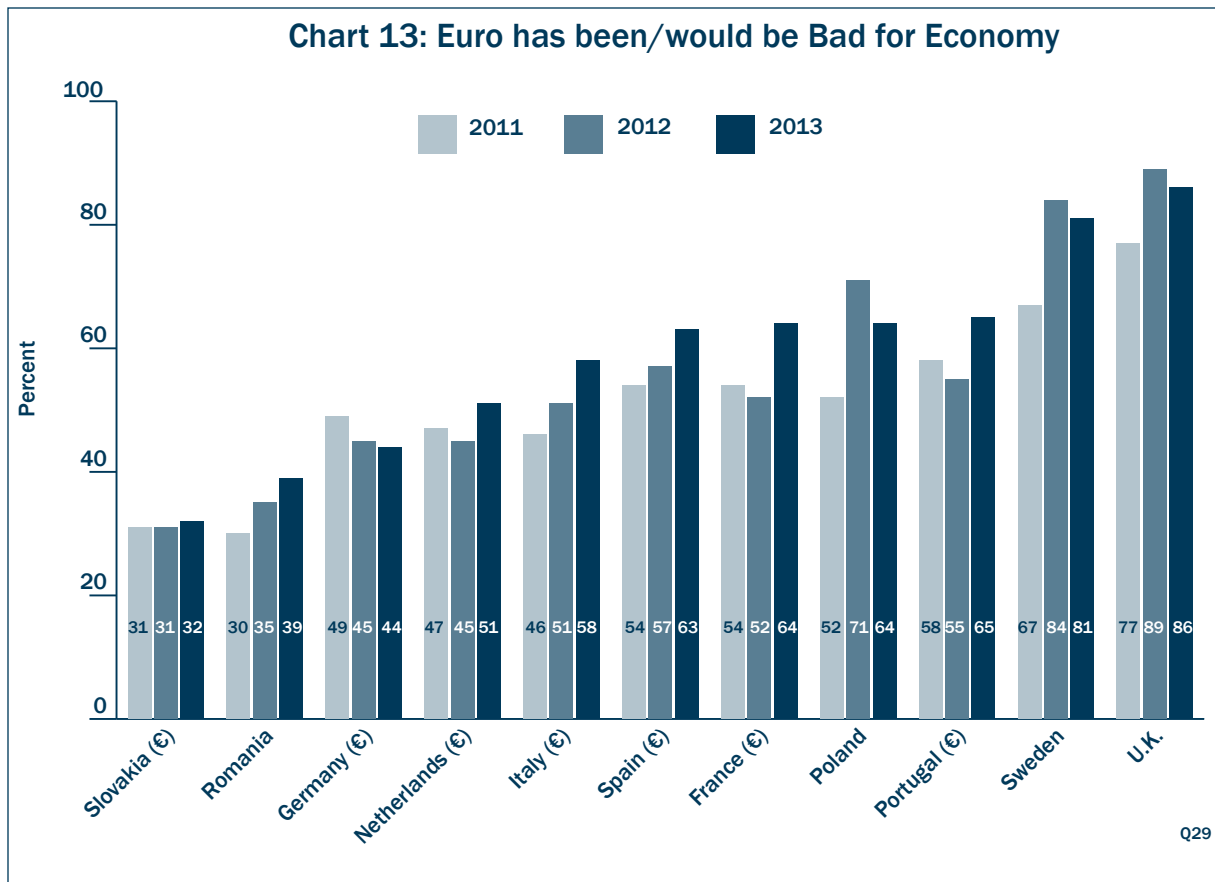
Swedish respondents and 49% of Spanish respondents (down eighteen percentage points since 2010) agreed. Agreement in the Netherlands went down 15 percentage points since 2010. In Portugal, the number of respondents who said that EU membership has been good dropped 20 percentage points since last year, from 69% to 49%.

At the same time, majorities in nearly every country surveyed responded that the use of the euro has been bad (or, in non-eurozone countries, would be bad) for their economy. Sixty percent of European respondents said that use of the euro has been bad, compared to 33% who said it has been good; within Europe, 64% of French respondents, up from 52% in 2012, said that it has been bad, as did 65% of Portuguese respondents (up from 55% last year) and 63% of Spanish respondents (up from 57% last year) (see Chart 13). In Germany and Slovakia, majorities or pluralities

believed that use of the euro has been good (52% and 59%, respectively).

Eighty-six percent of British respondents and 81% of Swedish respondents said that use of the euro would be bad.

However, few want to leave the euro. When *those who responded that use of the euro had been bad* were asked if they wanted to return to their previous currencies, majorities of that subset in France (57%, 27% of the full sample), Italy (51%, 24% of the full sample), the Netherlands (54%, 22% of the full sample), Portugal (55%, 27% of the full sample), and Spain (51%, 30% of the full sample) wanted to retain the euro. Majorities of the subset in Germany (57%, 26% of the full sample) and Slovakia (58%, 19% of the full sample) wanted to return to their previous currencies.



GROWING MAJORITIES DISAPPROVE OF EU CONTROL OVER NATIONAL ECONOMIC POLICY

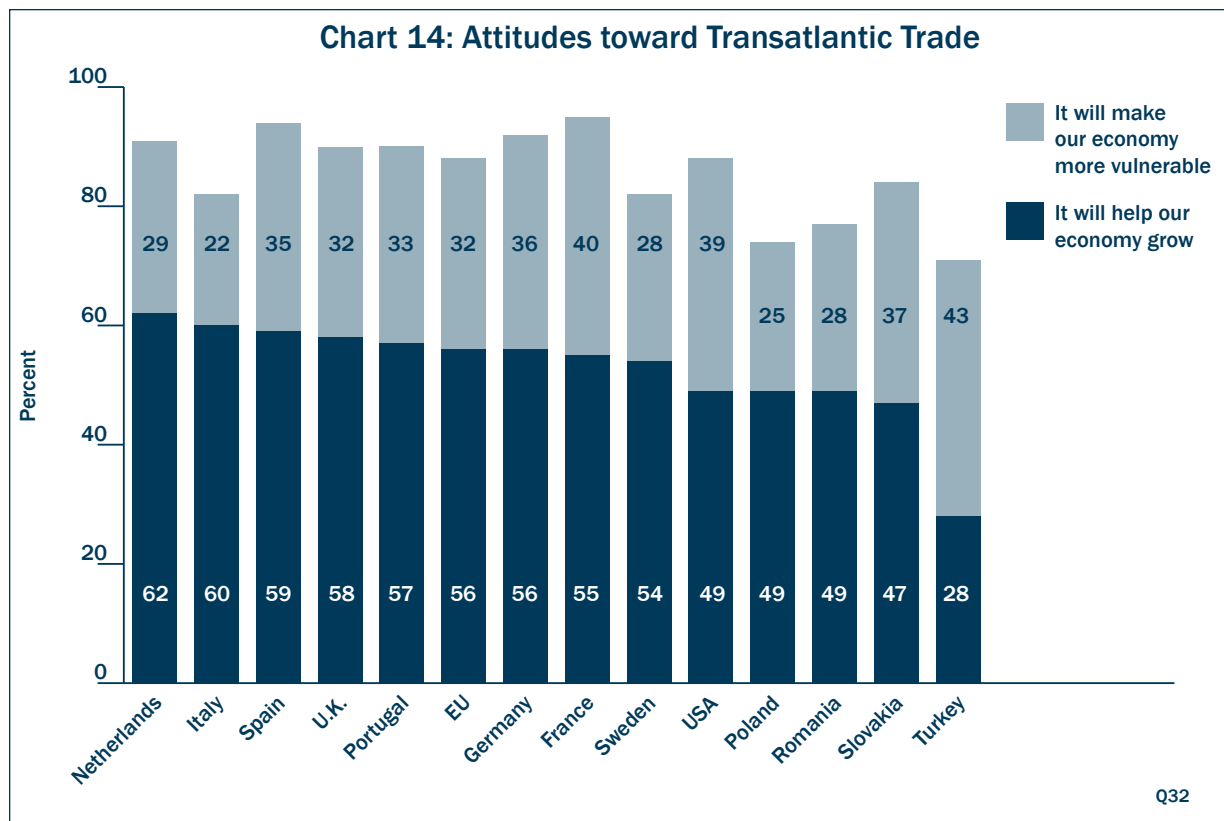
Very few respondents believe that the European Union should have more authority over member states’ budgetary and economic policy. Twenty-six percent of European respondents, down from 37% last year and 40% in 2011, believe the EU should exercise control over national economic policy, while 68%, up from 57% last year and 55% in 2011, believe that it should not. British, Swedish, Spanish, and Dutch respondents were the most likely to say that each member state should retain economic authority for itself (82%, 81%, 75%, and 75%, respectively).

While German respondents were the most likely to say that the EU should exercise control over national economic policy, this was a minority view (37%) and represented a 16 percentage point drop from last year, when a majority (53%) held that opinion.

DESPITE ECONOMIC CRISIS, MOST FAVOR INCREASED TRANSATLANTIC TRADE

Fifty-six percent of respondents in the EU and 49% of respondents in the United States said that increased transatlantic trade and investment would help their economies grow, while 32% in the EU and 39% in the United States said that increased trade and investment would render national economies more vulnerable. Within Europe, majorities or pluralities in every country agreed that increased trade would be beneficial, especially the Netherlands (62%), Italy (60%), Spain (59%), and the U.K. (58%) (see Chart 14).

Turkish respondents were more skeptical. Twenty-eight percent of Turks said that increased trade would help their economy grow, while 43% said it would make their economy more vulnerable.





Section Three: Transatlantic Security

As the NATO mission in Afghanistan wound down and interventions in Iraq and Libya receded further into the past, Syria's continuing deterioration became the most pressing threat to transatlantic security and stability in the past year. Despite a visibly deteriorating situation in Syria itself and increasing pressure on neighboring countries stemming from massive refugee outflows, consensus on international action remains elusive. At the same time, perennial issues continued to demand the attention of the global community: while Iran's recent presidential election appears to have opened an avenue towards direct U.S.-Iranian negotiations, concerns about its nuclear program remain. North Korea captured headlines at the beginning of the year with new rounds of nuclear tests and increasingly belligerent rhetoric. The aftermath of the September 2012 attack on the U.S. embassy in Benghazi, Libya, forced further re-evaluation of the transitions underway in the Middle East and North Africa. Finally, debates about the legitimacy of the use of drones in warfare continue to divide the United States and Europe.

OPINION ON THE SECURITY PARTNERSHIP REMAINS MIXED

As in earlier years, *Transatlantic Trends* asked whether the partnership in security and diplomatic affairs between the United States and the European Union should become closer, remain about the same, or whether the respondents' side should take a more independent approach. Although opinion is closely divided, pluralities of both Europeans (42%, down nine percentage points since 2004) and Americans (33%, up 13 percentage points from 2004) stated

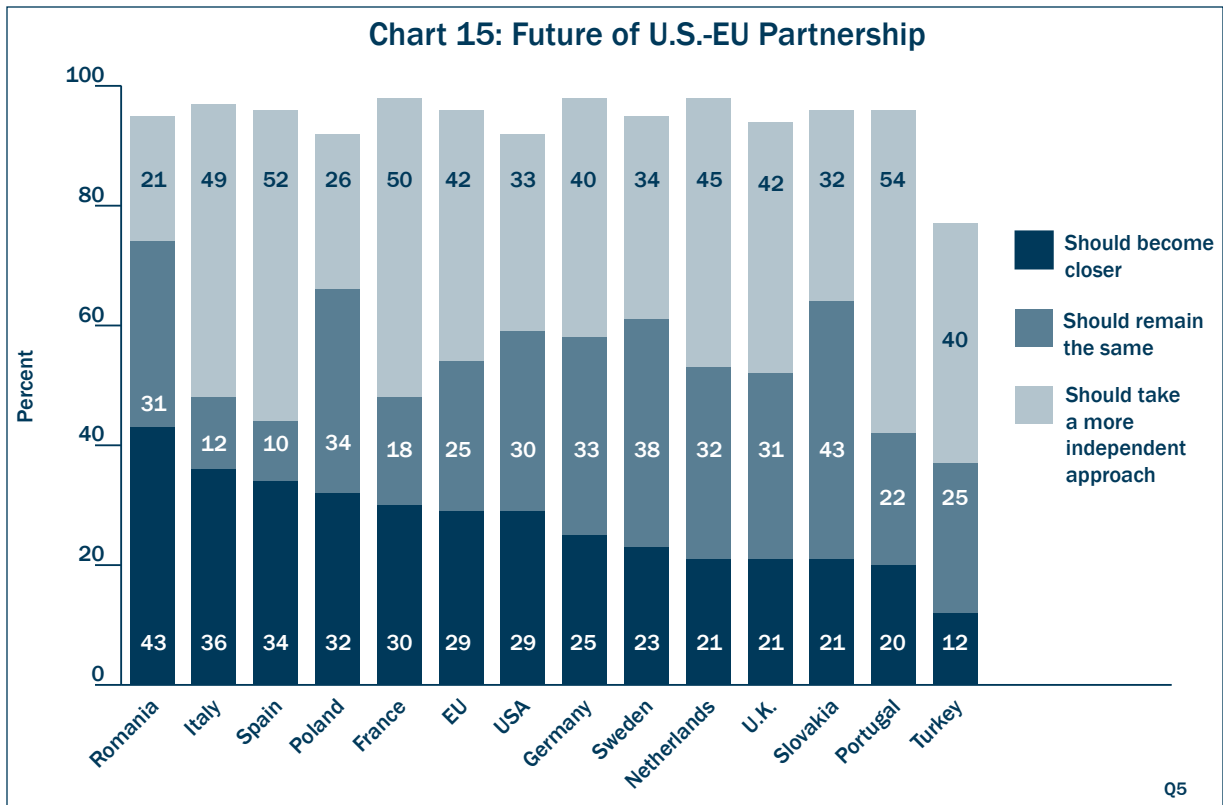
that their own side should take a more independent approach (see Chart 15).

About one-third of Americans (30%) thought the partnership should remain about the same; 25% of Europeans agreed. Twenty-nine percent of respondents on both sides of the Atlantic said relations should become closer. On the U.S. side, that represents a 31-point drop since 2004.

Among those who felt that their side should take a more independent approach, the highest percentages were found in Portugal (54%), Spain (52% — also the highest increase, with 9 percentage points), France (50%), and Italy (49%). Romanians (21%) and Poles (26%) were least likely to approve of this option.

As for those who wanted their side to move closer to its transatlantic partners, the highest percentages were registered in Romania (43%, but down eight percentage points), Italy (36%, down seven percentage points), and Spain (34%, down 6 percentage points). Respondents least interested in moving closer were the Portuguese (20%), the Dutch, and the British (both 21%). The Slovaks (43%) and the Swedes (38%) were the most likely to say things should stay just as they were.

A clear plurality of Turks (40%) wanted their country to take a more independent approach; 25% said relations should remain about the same, and 12% felt they should become closer.



STABLE MAJORITIES IN EUROPE AND THE UNITED STATES THINK NATO REMAINS ESSENTIAL

Despite pervasive pessimism about the ultimate success of the NATO mission in Afghanistan and continued debate about European contributions to allied burden-sharing, the institution was seen as “still essential” for their country’s security by 55% of Americans and 58% of Europeans — values that have hardly fluctuated since 2002.

There were considerable differences between countries, however. Figures ranged from a high of 72% in the Netherlands and 69% in the U.K., to lows of 46% (down 6 percentage points) in Italy and 47% in Poland. Slovakia saw the largest drop in support (to 54%, down 7 percentage points).

As in past years, Turkey was the NATO member with the lowest public support, with only 39% saying that NATO remains essential for their security.

AMERICANS APPROVE OF DRONES BEING USED TO KILL ENEMIES, EUROPEANS DISAPPROVE

Asked whether they approved of unmanned aircraft (drones) being used more extensively to find and kill suspected enemies in places like Afghanistan and Pakistan, 71% of U.S. respondents said they approved, while 53% of Europeans disapproved. Highest approval for the use of drones was found in the United Kingdom (55%), France (52%), and the Netherlands (49%). Disapproval was highest in Spain (65%), Sweden (63%), and Germany (61%).

In Turkey, 60% of respondents disapproved, while only 29% approved of the use of drones.

PLURALITIES IN UNITED STATES AND EUROPE PREFER TO MAINTAIN CURRENT DEFENSE SPENDING

When asked whether their governments should increase, maintain current levels, or reduce spending in general, most respondents chose either to maintain or reduce spending.

WHY IS NATO ESSENTIAL — AND WHY NOT?

Among the majority of respondents who considered that NATO was still essential for their country’s security, a majority in Europe (56%, 32% of the total sample) and a plurality in the United States (46%, 25% of the total sample) agreed with the proposition that “NATO is an alliance of democratic countries that should act together.” The highest approval for this statement was found in Germany (71%, 43% of the total sample), Spain (61%, 32% of the total sample), and Portugal (58%, 37% of the total sample); the lowest support was registered in Poland (44%, 21% of the total sample).

Twenty-four percent of U.S. respondents said that there are still major military threats endangering the United States (13% of the total sample); only 15% of Europeans (9% of the total) agreed. Agreement was highest in Slovakia (27%, 15% of the total) and the United Kingdom (25%, 17% of the total), and lowest in Germany (8%, 5% of the total) and the Netherlands (8%, 6% of the total).

Fifteen percent of Americans (8% of the total) felt that NATO helps countries share the cost of military action; 12% of Europeans (7% of the total) said the same. Agreement was highest in France (17%, 11% of the total).

Only 9% of Americans (5% of the total) agreed with the statement that “military actions are only legitimate if NATO supports them,” with 13% of Europeans (8% of the total) agreeing. The highest approval for this rationale was found in Romania (22%, 15% of the total), France (17%, 11% of the total), and the Netherlands (17%, 12% of the total), and the lowest in Slovakia (8%).

In Turkey, 30% of respondents (12% of the total) felt that NATO remains essential because it is an alliance of democracies, while 27% (11% of the total) agreed that it helps share the cost of military action, and 23%

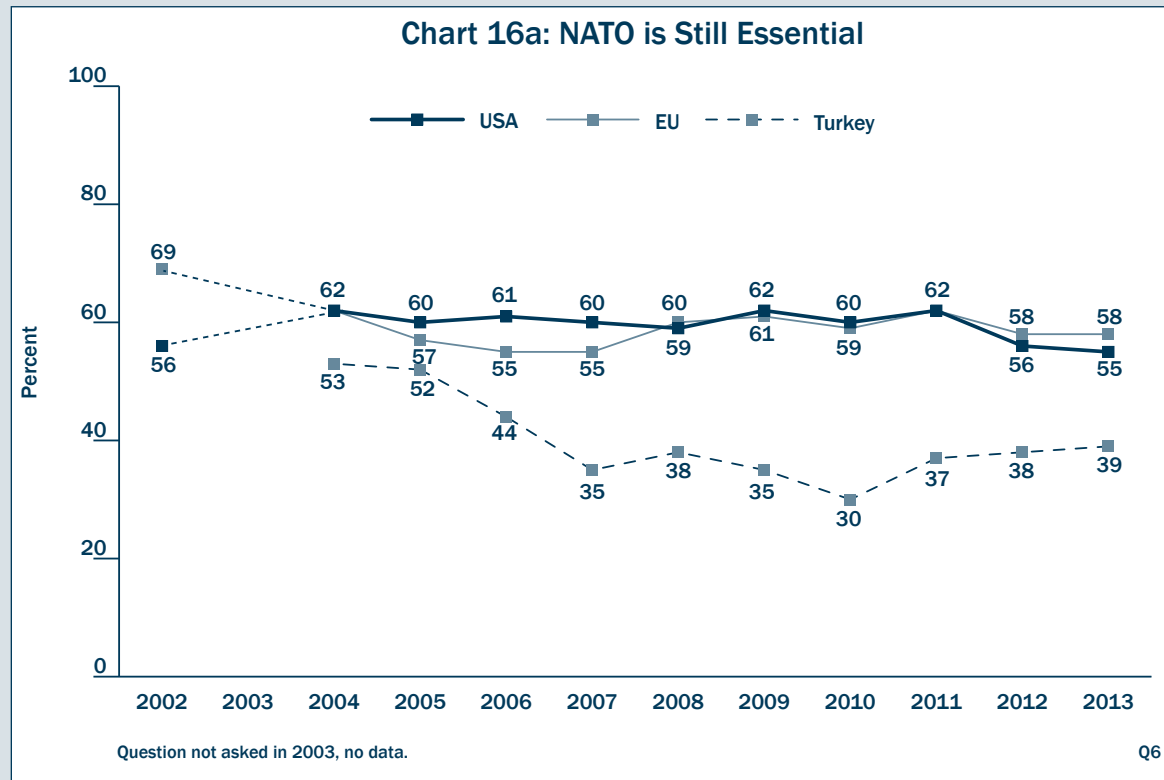
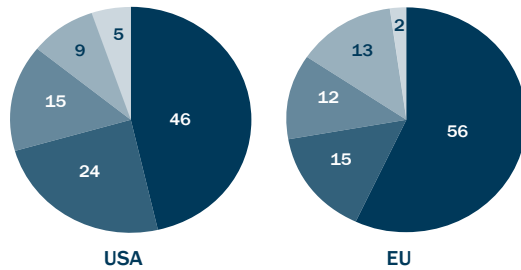


Chart 16b:

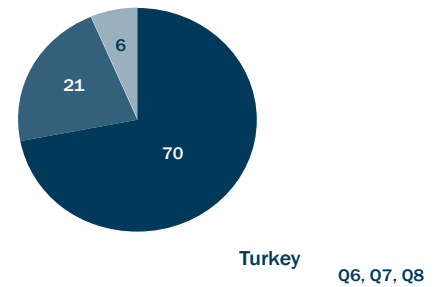
Why is NATO still essential?

- NATO is an alliance of democratic countries
- There are still major threats that endanger our country
- NATO helps countries share the cost of military action
- Military actions are only legitimate if NATO supports them
- Don't know/Refusal



Why is NATO no longer essential?

- Turkey should be able to make its own military decisions
- There are no major military threats that endanger Turkey
- Don't know/Refusal



(9% of the total) said their country was still endangered by major military threats. Fifteen percent (6% of the total) said military action was only legitimate if supported by NATO.

Among the minority of respondents who no longer considered NATO essential for their country's security, a majority in the United States (52%, 17% of the total sample) and a plurality in Europe (35%, 12% of the total sample) said their own country "should be able to make its own military decisions." This statement received the highest approval in the United Kingdom (60%, 14% of the total) and in Poland (41%, 15% of the total), and the lowest support in Slovakia (22%, 7% of the total).

Thirty-four percent of Europeans (11% of the total) said the European Union should have its own defense organization. Agreement was highest in France (46%, 16% of the total), Italy (43%, 16% of the total), and Spain (40%, 17% of the total), and lowest in Romania (17%, 4% of the total).

Thirty-two percent of Americans (10% of the total) agreed with the statement that Europe should take care of its own security.

Ten percent of Americans (3% of the total) and 26% of Europeans (9% of the total) said that there were no major military threats endangering their own country. Support for this statement was highest in Slovakia (44%, 15% of the total), Portugal (39%, 12% of the total), and Germany (33%, 12% of the total).

In Turkey, 70% of respondents (27% of the total) felt that their country should be able to make its own military decisions. Twenty-one percent (8% of the total) said there were no major military threats against their country.

However, when asked about *defense* spending in particular, pluralities in the United States and Europe (both 46%) wanted to maintain current military outlay levels, a number that has remained virtually unchanged since 2011.² Approval for this option was highest in France (57%), the United Kingdom (53%), Poland (52%), and the Netherlands (50%).

Thirty-eight percent of Europeans wanted to decrease spending (compared to 39% in 2012), as opposed to only 26% of Americans (compared to 32% in 2012). In Europe, approval for spending reductions was highest in Spain (56%), Italy (53%), and Slovakia (48%).

Twenty-five percent of Americans wanted to see an increase in defense spending, up from 20% in 2012, as opposed to only 14% of Europeans, up from 11% in 2012. Approval for this option was highest in Sweden (29%) and the United Kingdom (28%).

In Turkey, a majority (50%) supported a defense spending increase — a very large increase of 21 percentage points since 2012 — followed by 32% who supported maintaining current spending levels. Only 15% of Turkish respondents favored military spending cuts.

PUBLICS AGREE DEMOCRACY MATTERS MORE THAN STABILITY IN MIDDLE EAST, NORTH AFRICA

Concerning recent developments in the Middle East and North Africa, respondents were asked to choose between two propositions: “stability is more important even if it means accepting non-democratic governments” and “democracy is more important even if it leads to a period of instability.” A majority in Europe (58%) and a plurality in the United States (47%) preferred democracy over stability. Approval for this option was highest in Italy and Sweden (both 73%), Spain (71%), France (69%), and Germany (55%). Meanwhile, the strongest preferences for

stability over democracy were expressed in Romania (52%), Poland (50%), and Portugal (47%).

A majority of Turkish respondents (57%) preferred democracy in Northern Africa and the Middle East; 25% said they preferred stability, while 18% answered that they did not know or refused to answer.

NO APPETITE FOR INTERVENTION IN SYRIA

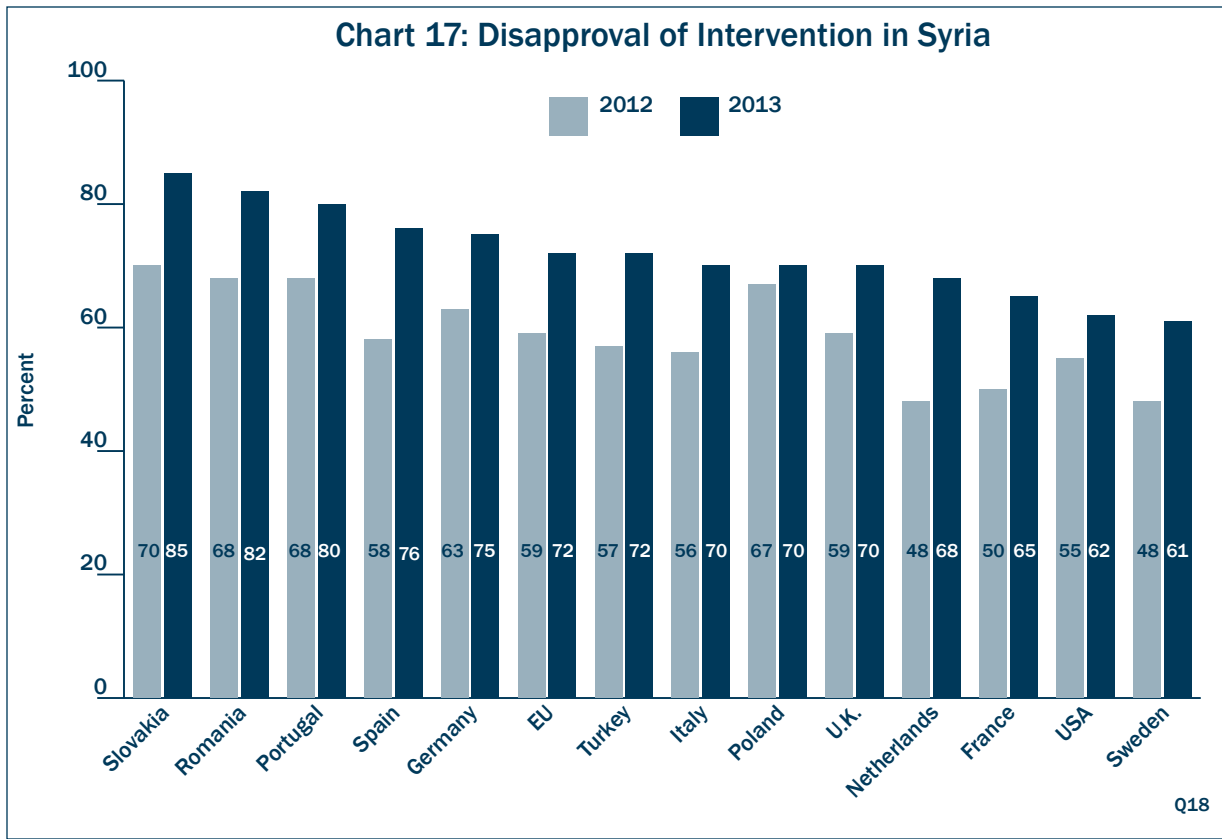
Here, respondents were told that there had recently been discussion of the desirability of intervening in Syria, where the government has been using military force to suppress an opposition movement. They were then asked whether their government should stay out completely or intervene. A two-thirds majority in the United States (62%, up 7 percentage points) along with nearly three-fourths of respondents in Europe (72%, up 13 percentage points) preferred to stay out. Slovakia (85%), Romania (82%), Portugal (80%), Spain (76%), and Germany (75%) were particularly adamant that their countries not get involved. The largest increases for this option were found in the Netherlands (68%, up 20 percentage points) and Spain (up 18 percentage points) (see Chart 17).

Only one-in-three respondents in the United States (30%, down 5 percentage points) and even fewer in Europe (22%, down 10 percentage points) felt their countries ought to intervene in Syria. In this group, the highest approval rates were registered in France (33%) and Sweden (31%), but with drops of 12 and 13 percentage points, respectively.

In Turkey, 72% of respondents said their country should stay out of Syria (up 15 percentage points), while only 21% (down 11 percentage points) favored intervention.

In 2012, most countries polled had registered double-digit “don’t know” or refusals to answer on this issue; this year, “don’t know” and refusals shrank to 2-9%.

² Trend data taken from Q36a in 2011 *Transatlantic Trends* survey.



EU AND UNITED STATES NOW BOTH PREFER SANCTIONS TO MILITARY ACTION AGAINST IRAN

Transatlantic opinions about how best to prevent Iran from acquiring nuclear weapons have converged. A plurality of Americans (29%) preferred imposing economic sanctions. A plurality of Europeans (32%, up four percentage points) agreed, in a shift from previous years, when Europeans had tended to prefer offering economic incentives instead. The highest approval for the sanctions option was registered in the Netherlands (38%) and Germany (37%); the lowest values were found in Italy and Slovakia (both 26%).

Preferences for offering economic incentives dropped sharply, with only 18% of Europeans (down 16 percentage points) and 8% of Americans (down 12 percentage points) supporting this option. In Germany, which in 2012 had been the strongest voice (44%) for incentives, support dropped by 17 percentage points (see Chart 18).

Neither Americans (8%, down 17 percentage points since 2010) nor Europeans (stable at 11% since 2010) wished to offer support to opponents of the Iranian government within Iran. Swedish respondents (23%) were most keen on this option.

Americans and Europeans were also in agreement (13% and 12%, respectively) about the level of desirability of using computer technology to sabotage nuclear installations — an option they were given in the survey for the first time. In Europe, Italians (19%), Slovaks (16%), Portuguese (15%), and French (14%) respondents particularly liked this option. Germans, Swedes (both 8%), and Dutch (9%) respondents liked it least.

As in previous years, there was little support in the EU countries polled (5%) or in the United States (6%) for simply accepting that Iran could acquire nuclear weapons while other options were on the table.

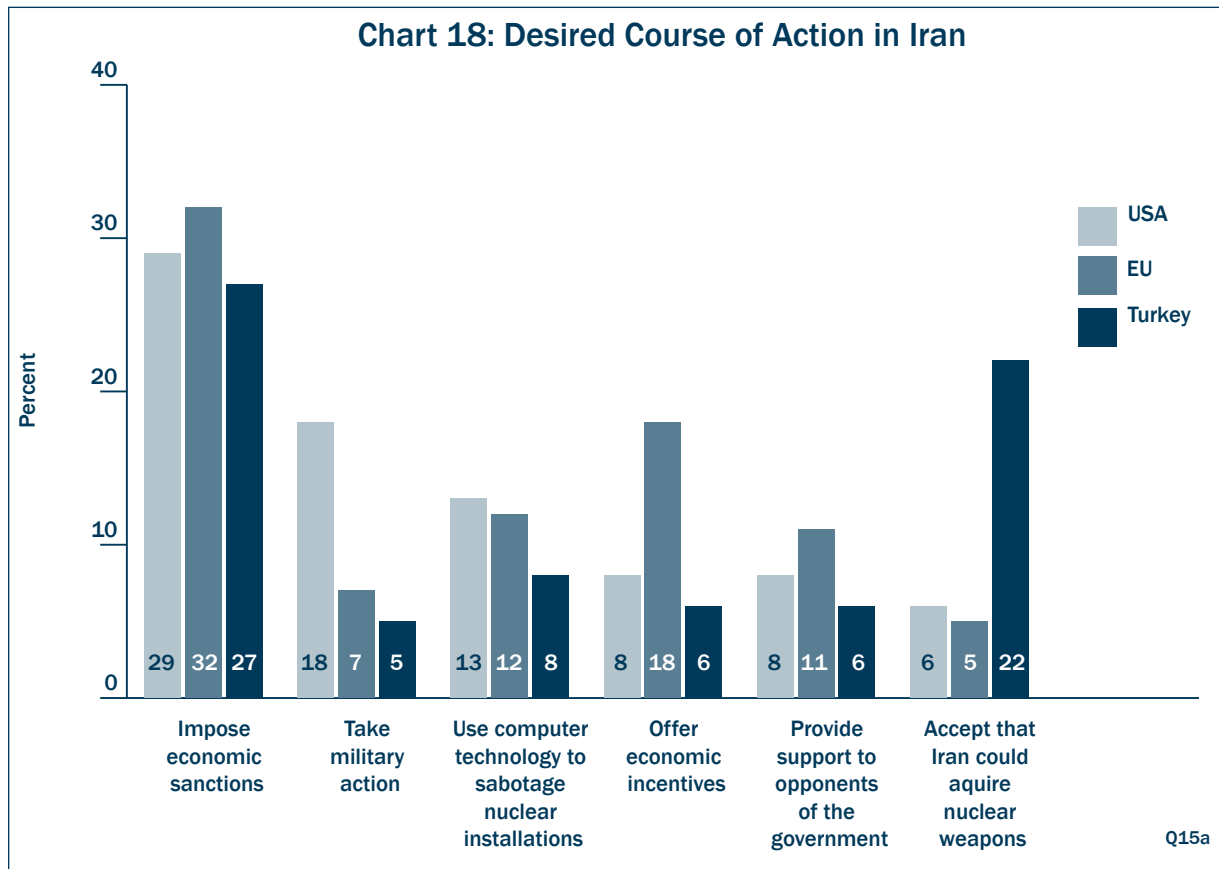
Very few people in the EU (7%) preferred military action above all other options, as opposed to 18% in the United States (up 9 percentage points since 2010). In Europe, only French approval rates (13%) came close to those of Americans.

Turkish respondents (27%, up 11 percentage points) also converged with Americans and Europeans on the desirability of economic sanctions. However, as in the past, many more Turks (22%) than Americans or Europeans were willing to accept an Iran with nuclear weapons. Even fewer Turks (5%) were willing to condone military action.

FORCE AGAINST IRAN IF NOTHING ELSE WORKS?

While very few Europeans and Americans favored military action to stop Iran from acquiring nuclear weapons when given a broad choice of options, changing the context of the question led to very different results. Respondents who chose a non-

military option for dealing with Iran were next asked to imagine that all non-military options had been exhausted. They were then given the choice between accepting a nuclear Iran or taking military action. In this scenario, a plurality of Europeans (48%, or 35% of the total sample) and a majority of Americans (64%, or 37% of the total sample) favored the use of force. The military option elicited the highest approval in Portugal (65%, 44% of the total sample) and France (61%, 46% of the total sample), and the lowest in Germany (39%, 32% of the total sample) and Slovakia (33%, 21% of the total sample). The option of accepting a nuclear Iran if military action was the only available alternative met with most favor in Germany (51%, 41% of the total sample), the Netherlands (45%, 34% of the total sample), and the United Kingdom (45%, 32% of the total sample).

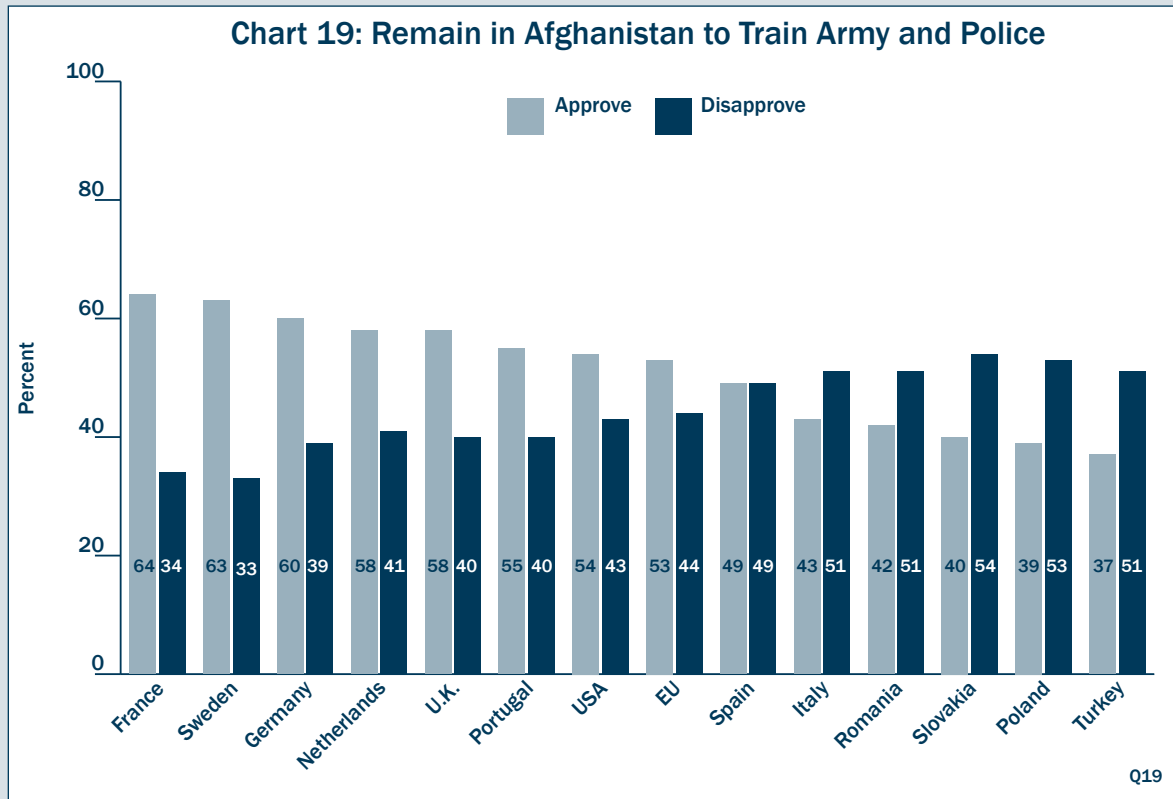


ALLIES DIVIDED ON WHETHER TO MAINTAIN TROOPS IN AFGHANISTAN

Last year, when asked what to do about troop levels in Afghanistan, majorities in Poland, France, Italy, the U.K., and Germany wanted to withdraw all troops completely (62%, 61%, 55%, 52%, and 51%, respectively); a plurality in the United States agreed (44%).¹ Further, Europeans tended to describe intervening in Afghanistan as a mistake (55% in Poland, 51% in France and Italy, 52% in the U.K., and 53% in Germany) and, when asked about prospects for stability, said they were pessimistic (54% in Poland, 84% in France, 67% in Italy, 70% in the U.K., and 81% in Germany).

This year, however, most Europeans (53%) supported keeping troops in Afghanistan to train the Afghan army and police. Sixty-four percent of respondents in France, 58% in the U.K., and 60% in Germany approved of their country contributing to the effort, while 34% of respondents in France, 40% in the U.K., and 39% in Germany opposed it. U.S. respondents felt similarly. Fifty-four percent approved of the United States keeping troops in Afghanistan, while 43% disapproved (see Chart 19).

Slovak, Polish, Italian, and Romanian respondents, however, were less enthusiastic. Fifty-four percent of Slovaks disapproved of their government contributing troops, as did 53% of Poles, and 51% of both Italians and Romanians. Turkish respondents were no more positive. Fifty-one percent of Turks disapproved of Turkey's participation, while 37% approved.



¹ 2012 data based on questions 32.1, 32.2, 32.3, 33.1, 33.2, 33.4, 33.5, 34a, and 34b in *Transatlantic Trends 2012*.

However, this question also elicited very high “don’t know” and refusal rates, amounting to a plurality in Slovakia (35%).

Forty-eight percent (23% of the total sample) of Turkish respondents preferred to accept a nuclear Iran; only 23% (20% of the total sample) were willing to condone military action, while 29% said they did not know or refused to answer.

EUROPEANS, AMERICANS SUGGEST SIMILAR SOLUTIONS FOR NORTH KOREA...

This year, for the first time, *Transatlantic Trends* asked respondents how they wanted the existing North Korean nuclear program dealt with. Pluralities in America (30%) and Europe (29%) preferred the imposition of economic sanctions; the next largest group in Europe (21%) favored economic incentives, while 19% of Americans favored the use of military action. Eleven percent of Europeans and 15% of Americans liked the option of using computer technology to sabotage nuclear installations. Eleven percent of Europeans and 6% of Americans were willing to consider offering support to opponents of the government. Very few respondents (7% in Europe and 6% in the United States) were willing to accept that North Korea could retain its nuclear weapons. Only 6% of Europeans supported taking military action instead.

A plurality of Turkish respondents answered “don’t know” or refused to answer this question; the next largest group (20%) preferred the imposition of economic sanctions.

...BUT DIVIDED ON USE OF FORCE

Very few Europeans and Americans favored military action to stop North Korea’s nuclear weapons program when given a broad choice of options, but, as with Iran, changing the context of the question led to different results. Respondents who chose a non-military option for dealing with North Korea were next asked to imagine that all non-military options had been exhausted. They were then given

the choice between accepting a nuclear North Korea or taking military action. In this scenario, Europe and the United States were divided: a majority of Americans (67%, 40% of the total sample) favored the use of force, while a plurality of Europeans (44%, 28% of the total sample) preferred to accept a nuclear North Korea. The military option elicited the highest approval in France (51%, 37% of the total sample) and Spain (48%, 36% of the total sample). The option of accepting a nuclear North Korea if military action was the only available alternative met with most favor in Germany (59%, 49% of the total sample), the United Kingdom (57%, 39% of the total sample), Sweden (48%, 35% of the total sample), and the Netherlands (46%, 33% of the total sample).

In Turkey, 62% of respondents (33% of the total sample) were willing to accept a nuclear North Korea, with only 24% (13% of the total sample) preferring military action. This question also elicited very high “don’t know” and refusal rates, up to 33% in Italy and 31% in Slovakia.

USE OF FORCE: TRANSATLANTIC DIVERGENCES IN PRINCIPLE (IF NOT PRACTICE)

The United States and Europe disagree on the use of force more often than not, and surveys have shown that this is a deeply rooted difference unlikely to be affected by changing security environments or crises. In 2013, when asked if they agreed that war was sometimes necessary to obtain justice, there was a 37-percentage point difference between Americans (68% of whom agreed, down six percentage points) and Europeans (31% of whom agreed). The United Kingdom, with 59% (but down five percentage points) agreeing, continued to be the only country in the survey that responded more like the United States than like the rest of Europe. Still, U.S. approval of war as a means towards justice has drifted downwards by ten percentage points since 2006 and 16 percentage points since 2003. Meanwhile, disapproval has moved up in some of the European countries, such as Spain (83%, up nine percentage points) and Italy (79%, up five percentage points), Slovakia (75%, up six per-

SWEDEN AND NATO

Last year, Swedish respondents stood out for their willingness to participate in military interventions abroad, especially those conducted under the aegis of the United Nations. In 2012, 56% of Swedes said that intervening in Iraq was the right thing to do (38% of European respondents agreed), 62% said the same of Afghanistan (42% of Europeans agreed), and an overwhelming 68% approved of intervening in Libya (48% of Europeans agreed).¹ Swedish respondents were also the most likely to want to maintain troop levels in Afghanistan (45%), and among the least likely to want to withdraw all troops (26%). When asked about participating in future NATO operations, Swedes were evenly divided until the United Nations was mentioned. Forty-seven percent supported participating in NATO operations in general, while 67% supported participating in NATO operations mandated by the UN.

This year, opinion on participation in NATO operations remained virtually unchanged – 47% said that they would support participating in future NATO operations, as in last year’s survey, while 62% said that they would support participating in NATO operations mandated by the UN, a five-percentage-point drop from 2012.

However, Swedish respondents were more interested in Sweden joining the alliance. Thirty-six percent of respondents, 12 percentage points higher than in 2012, said that Sweden should join NATO, while 56% of respondents, 13 percentage points lower than in 2012, disagreed. Swedish respondents were also among the most likely to approve of keeping troops in Afghanistan to train the Afghan police and military. Twenty-five percent of Swedish respondents strongly approved, while 39% approved somewhat.

¹ Again, 2012 data based on questions 32.1, 32.2, 32.3, 33.1, 33.2, 33.4, 33.5, 34a, and 34b in *Transatlantic Trends 2012*.

centage points), and the Netherlands (57%, up eight percentage points).

That said, *Transatlantic Trends* has also shown U.S. and European public opinion converging on a broad range of specific security policies involving the use of force, such as whether NATO should withdraw forces from Afghanistan (while keeping some troops to train the Afghan security forces) and the desirability of intervention in Syria.



Section Four: Mobility, Migration, and Integration

As societies on both sides of the Atlantic continue to grapple with the challenges and the opportunities that mobility and immigration offer, a host of related issues have risen higher on policymakers' agendas. More often than not, they are connected with issues of foreign, security, and economic policy in multiple ways.³

The United States continues to debate immigration reform, while within Europe, the economic crisis has had a visible impact on mobility flows, most notably to Germany but also to countries in the global South. Regardless of the number of actual migrants, the topic of migration continues to raise concerns about the social and economic impacts of migration in many countries.

German politicians have framed increased immigration as a mostly positive development that offsets demographic decline and fills labor shortages. Indeed, the German government — in a policy turnaround — introduced several measures last year to recruit immigrants from within and beyond the EU; this now places Germany, together with Sweden, among the OECD countries with the most open migration policies.

³ The 2008-2011 data reported in this section was collected in a separate survey, *Transatlantic Trends: Immigration* (TTI). Some TTI trend questions were used in this section. Comparability of the 2013 data with previous data sets is limited, however, because of a potential framing effect due to the fact that immigration questions were here preceded for the first time by questions about foreign, security, and economic policy. By way of introduction to the section on immigration in this year's *Transatlantic Trends*, interviewees were given a prompt describing legal immigrants as "immigrants who work and/or live in the respective country with the national government's permission." The term "illegal immigrants," was explained as referring to "immigrants who work and/or live in the country without the national government's permission."

AMERICANS, EUROPEANS SPLIT ON WHETHER IMMIGRATION IS PROBLEM OR OPPORTUNITY

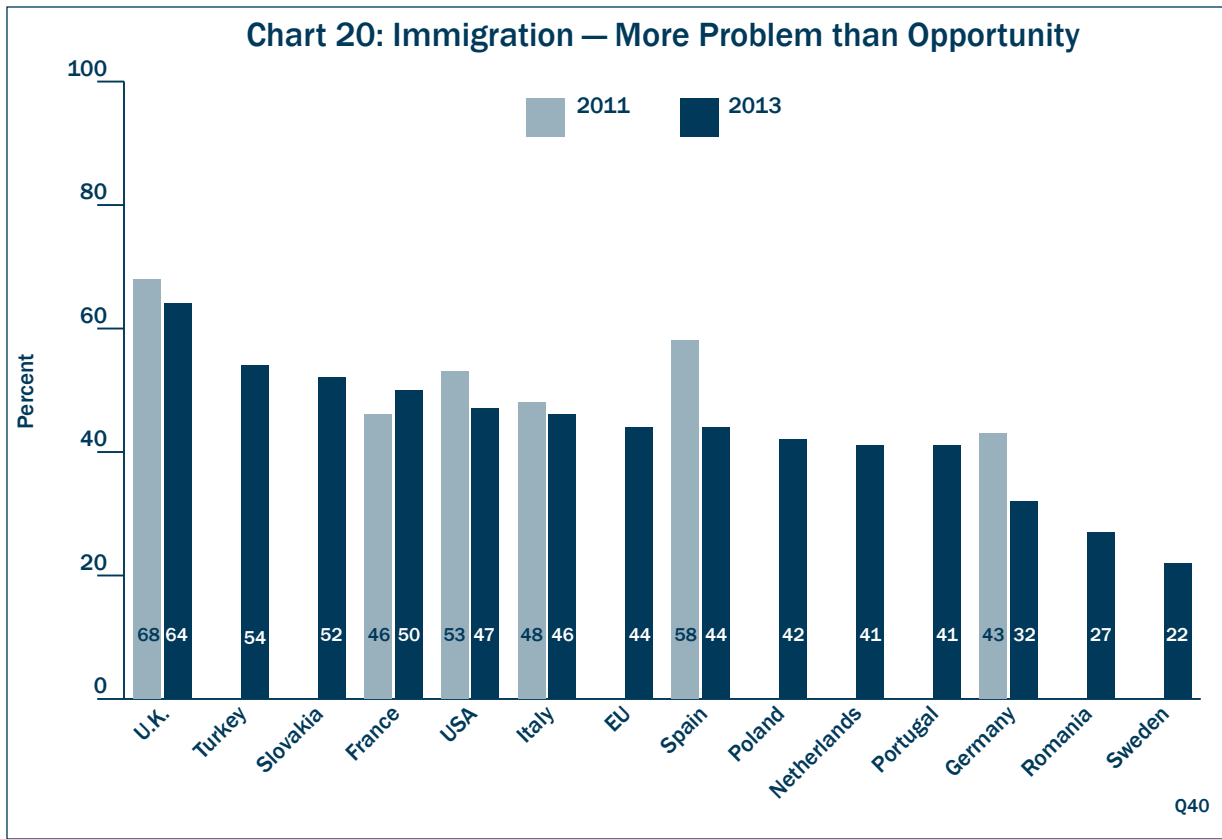
A good way to assess the general perception of immigration is to ask whether respondents consider immigration to be more of a problem or an opportunity for their country. On this question, Americans were evenly split (more of a problem: 47%, but down six percentage points from 2011; more of an opportunity: 46%). Similarly, 44% of Europeans saw immigration as more of a problem, with 41% seeing it as more of an opportunity. In Europe, the view that immigration is more of a problem was most common in the United Kingdom (64%), Slovakia (52%), and France (50%). Respondents in Sweden (68%) and Germany (62%) were most likely to see immigration as more of an opportunity, the latter showing a clear trend towards greater optimism about immigration.

In Turkey, 54% of respondents saw immigration as more of a problem, whereas only 18% saw it as more of an opportunity. Twelve percent thought it was both.

Noticeably, countries in the survey with a relatively low share of immigrants (Poland, Romania, and Slovakia) show a higher number of respondents who see immigration as neither a problem nor an opportunity (13%, 21%, and 19% respectively) (see Chart 20).

LARGE TRANSATLANTIC MAJORITIES ARE NOT WORRIED ABOUT LEGAL IMMIGRATION...

Designing legal immigration schemes and controlling illegal immigration are major policy challenges on both sides of the Atlantic. When asked if they were worried about legal immigration, majorities in America (73%, down from 82% in 2011) and Europe (69%) agreed that they were not. In Europe,



agreement was highest in Sweden (78%), Romania (77%), Spain (75%), Portugal (74%), Italy (72%), and Germany (69%) (see Chart 21).

However, a quarter of Americans (25%, up seven percentage points since 2011) stated that they were worried about legal immigration; 29% of Europeans shared this view. Concern was highest in the United Kingdom (41%, up six percentage points since 2008), Slovakia (35%), the Netherlands and France (both 32%, up 11 percentage points in the latter since 2008).

In contrast, a two-thirds majority of Turks (60%) answered that they were worried about legal immigration; only 33% disagreed.

... BUT TWO-THIRDS IN UNITED STATES AND EUROPE WORRY ABOUT ILLEGAL IMMIGRATION

When asked whether they worried about illegal immigration, 61% of Americans said that they did, joined by 71% of Europeans. Concern was highest

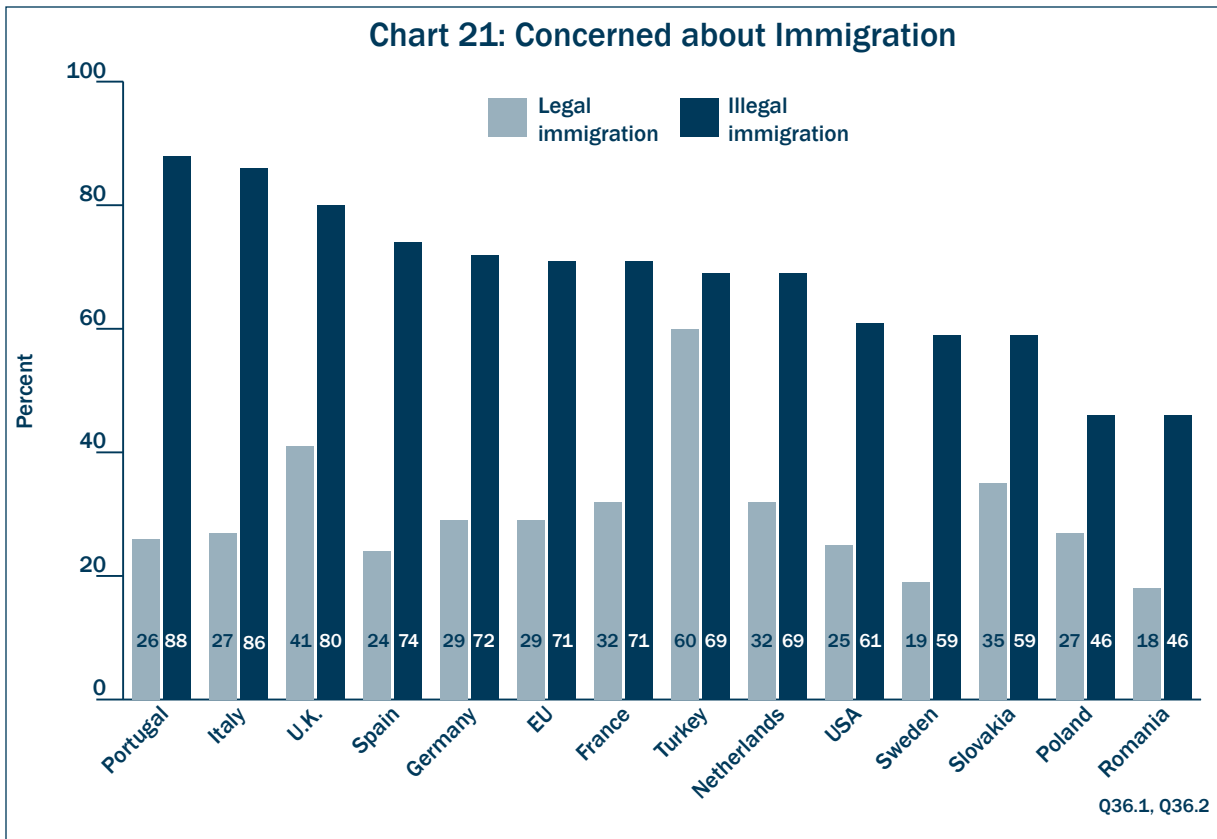
in Portugal (88%), Italy (86%), the United Kingdom (80%, up eleven percentage points since 2008), Spain (74%), Germany (72%, up six percentage points since 2008), and France (71%, up nine percentage points since 2008).

Only 37% of Americans said they were not worried, with 27% of Europeans agreeing (Poland and Romania: 48%; Sweden: 39%; Slovakia: 38%).

Turkish concern about illegal immigration (69%) was in line with feelings in Europe; only 23% of Turkish respondents said they were not worried about illegal immigration.

PUBLICS ON BOTH SIDES OF THE ATLANTIC OVERESTIMATE IMMIGRANT NUMBERS

Estimates of the size of the immigrant population present a valuable indication of the public perception of immigration. Respondents were asked to estimate, on a scale of 0 to 100, the percentage of the popula-



tion in their country that was born abroad. As in previous years, the public largely overestimated the percentage share of immigrants in their countries. On average, U.S. respondents guessed the share of immigrants in their country to be 42.1%; in fact, only 13% of the U.S. population is foreign-born.⁴ Portuguese respondents said 34.6% of their country’s residents were immigrants (actual number: 8.3%).

The Swedes were closest to reality when they estimated their population to be 18.3% foreign-born (actual number: 15.1%). Turkish respondents guessed the share of immigrants in their society to be 21.2%; the actual number is 2.0% (see Chart 22).

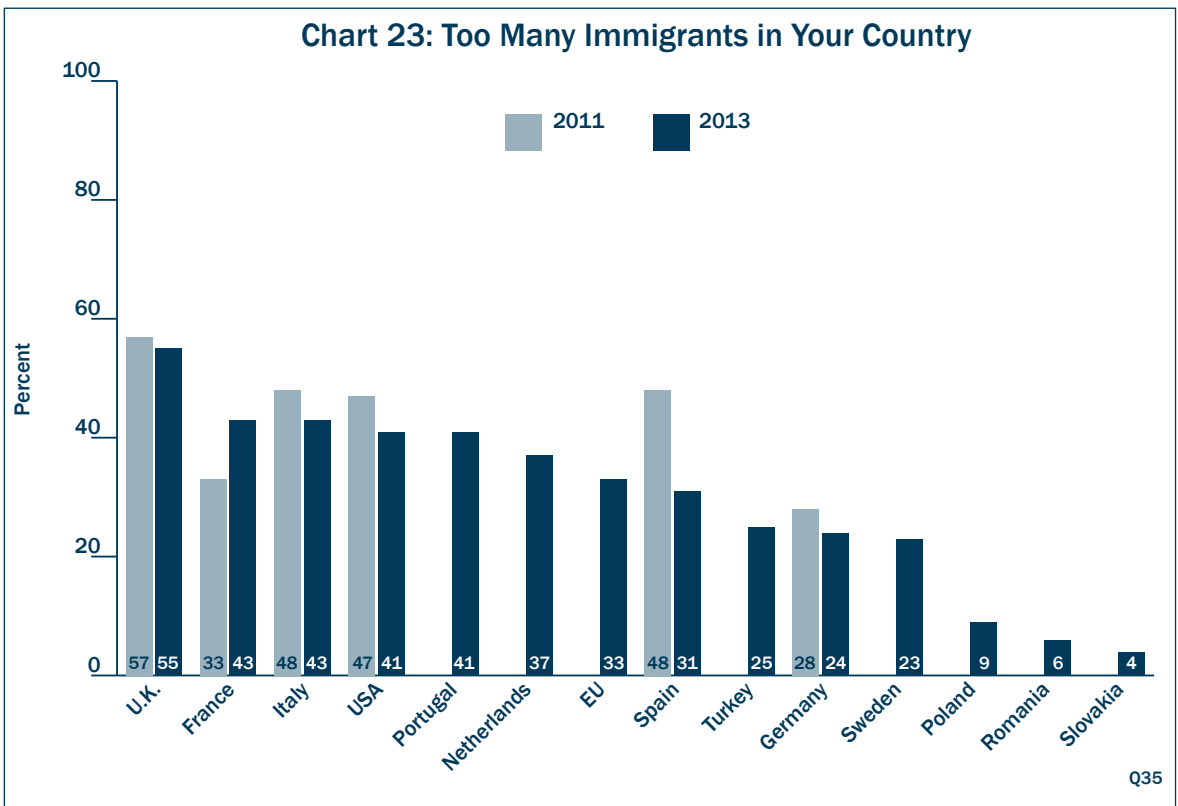
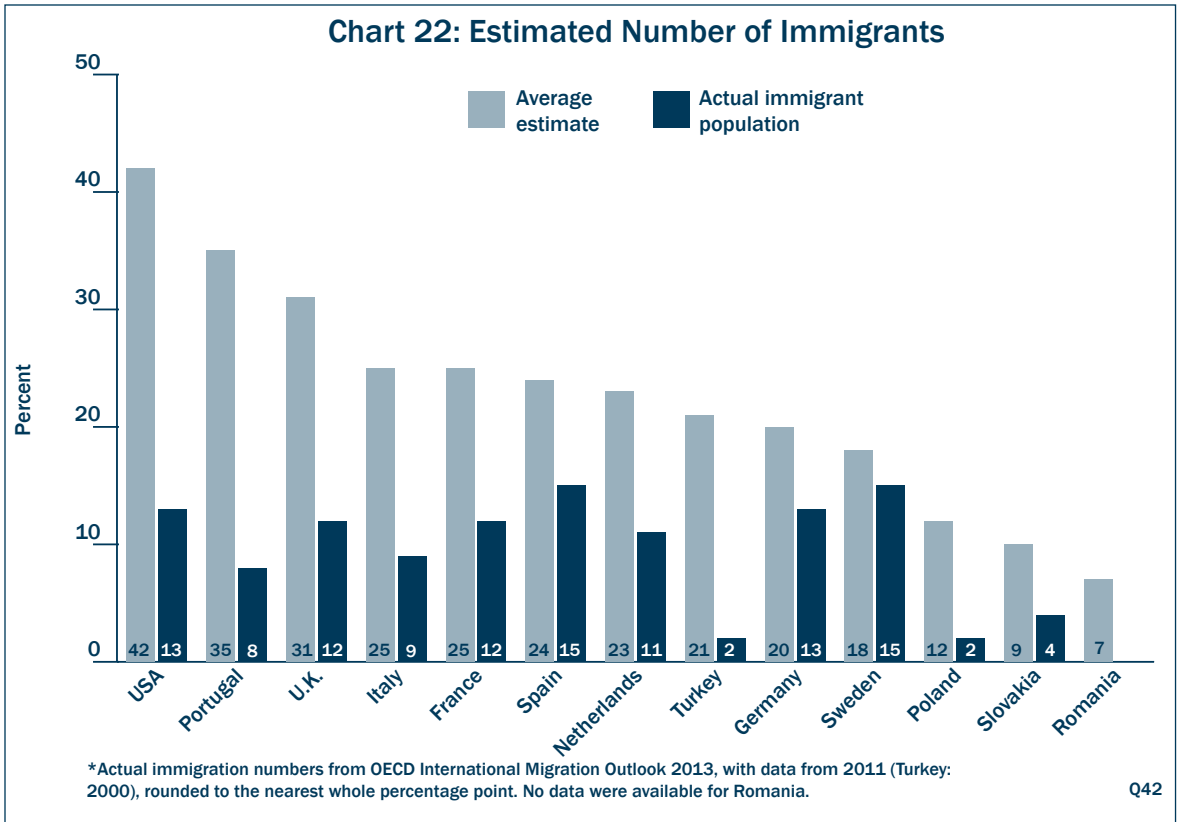
The rate of “don’t knows” and refusals was particularly high with regard to this question, ranging up to 50% in Romania.

⁴ All references in this sub-section are from the OECD International Migration Outlook 2013, with data from 2011 (Turkey: 2000). No data were available for Romania.

PLURALITIES SAY THEY SEE A LOT OF IMMIGRANTS, BUT NOT TOO MANY

In this question, respondents were asked whether there were “too many,” “a lot but not too many,” or “not many” immigrants in their country. A plurality of Americans (41%, down six percentage points from 2011) responded that there were “too many” immigrants in their country, with 33% of European respondents agreeing. The highest level of concern was registered in the United Kingdom (55%, stable since 2008); pluralities in France and Italy (both 43%), Portugal (41%), and the Netherlands (37%) felt the same way. The highest increase was registered in France (up ten percentage points since 2011, and 16 since 2008) (see Chart 23).

A plurality of Europeans (39%) said there were “a lot but not too many” immigrants in their country; 39% of Americans concurred. Within Europe, majorities in Germany (55%) and Sweden (52%) chose this option.



Only in Romania and Slovakia (both 51%) did a majority of respondents say there were “not many” immigrants in their country.

In Turkey, a plurality of respondents (35%) said there were “not many” immigrants in their country; 32% said there were “a lot but not too many,” and 25% said there were “too many.”

MAJORITIES IN UNITED STATES AND MUCH OF EUROPE SAY FIRST-GENERATION IMMIGRANTS ARE WELL INTEGRATED...

Publics in both Europe and the United States were mostly optimistic about the integration of immigrants. Majorities in the United States (61%) and Europe (52%) stated that they felt that first-generation immigrants were integrating well into their society. Majorities agreed in Portugal (79%), Romania (69%), Spain (63%), Italy and Slovakia (both 60%), and the Netherlands (54%). Pluralities agreed in the U.K. (48%) and Poland (47%) (see Chart 24).

However, majorities in Sweden (61%) and France (53%, up six percentage points since 2011), as well as a plurality in Germany (48%), disagreed, saying immigrants were integrating poorly.

In Turkey, 74% of respondents stated that first-generation immigrants were integrating poorly. Only 13% disagreed.

... EVEN MORE SAY THE SAME OF CHILDREN OF IMMIGRANTS

When respondents were asked about second-generation immigrants, answers were much more positive. Sixty-eight percent (though down 6 percentage points from 2011, and 11 percentage points from 2010) of Americans thought they were integrating well, with 59% of Europeans concurring. Agreement was highest in Portugal (82%), Spain (73%), Slovakia (71%), as well as Italy and Romania (both 66%).

The highest percentages of respondents who said that immigrants’ children were integrating poorly were found in France (55%, up 17 percentage points from

2011), Sweden (43%), the United Kingdom (38%, up nine percentage points from 2011), Germany, and the Netherlands (both 35%).

Fifty-six percent of Turkish respondents thought that second-generation immigrants were integrating poorly; only 33% thought they were integrating well.

MAJORITIES SAY GOVERNMENTS ARE DOING A BAD JOB OF MANAGING IMMIGRATION

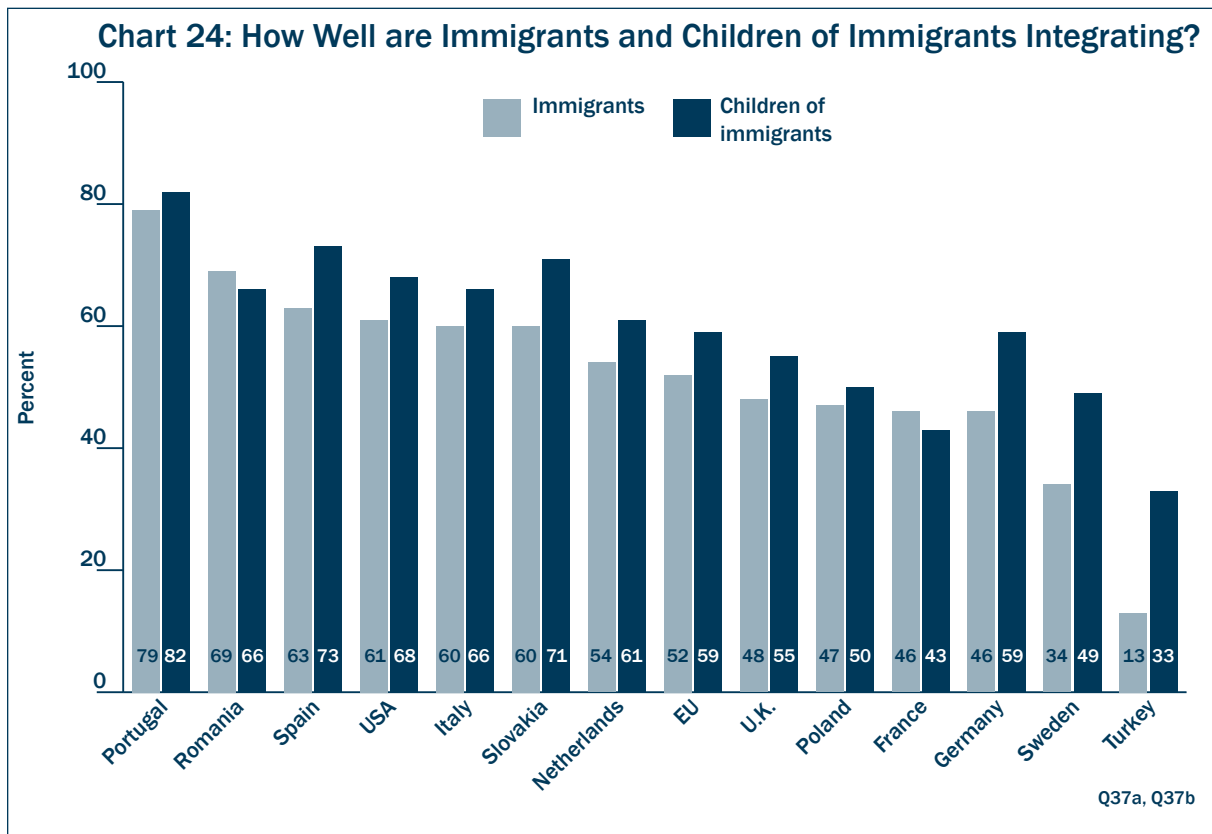
Publics on both sides of the Atlantic were unhappy with their government’s management of immigration policy. Sixty-eight percent of Americans stated that the U.S. government was doing a poor job; 58% of Europeans felt the same way about their governments. In Europe, concern with government management of immigration registered most highly in Italy (83%), Spain (74%, up nine percentage points from 2011), the United Kingdom (72%), Sweden (64%), France (59%, but down seven percentage points since 2011), and the Netherlands (54%). Pluralities in Poland (49%) and Portugal (44%) agreed.

Only in Germany (54%, up 16 percentage points since 2011) did a majority of respondents approve of their government’s immigration policy. While a causal relation cannot be established, it is noteworthy that the German government has passed several new laws in 2012 and 2013 opening up the German labor market to immigrants. The general public debate about immigration in that time has largely related to a need for increased migration to offset the shrinking population and to fill shortages in the labor market to keep Germany competitive — a far cry from 2010, when Germany’s chancellor Merkel talked about the “failure of multiculturalism.”

In Turkey, 61% of respondents stated that their government was doing a poor job; only 29% disagreed.

IMMIGRANTS NOT SEEN AS THREAT TO ECONOMY OR CULTURE

Perceptions of immigration are shaped by both cultural and economic concerns. Respondents were therefore asked a series of questions to pinpoint



exactly what they consider the most important criteria by which the benefits and drawbacks of increased immigration can be judged.

When asked whether “immigrants take jobs away from native born” citizens of their country, half of respondents in the United States agreed (50%, down seven percentage points since 2011). A majority in Europe (62%) disagreed; disagreement was strongest in Germany (80%, up five percentage points since 2011), Sweden (77%), France (69%, down five percentage points since 2011), Italy (67%), Spain (65%), and the Netherlands (62%).

Seventy percent of Turkish respondents agreed that immigrants take away jobs from native born citizens; only 24% disagreed.

When asked whether “immigrants generally help to fill jobs where there are shortages of workers,” two-thirds majorities in the United States (69%) and Europe (66%) said that they did. Agreement

was highest in Germany (75%), Sweden (74%), Italy (71%), and the Netherlands (70%). Disagreement was highest in Slovakia (43%) and Romania (40%).

In Turkey, opinion was more equally divided, with 52% saying that immigrants generally help to fill jobs and 43% disagreeing.

When asked whether “immigrants help create jobs as they set up new businesses,” a majority of Americans (54%) said that they did, with 43% disagreeing. Europeans were more equally divided, with 49% agreeing and 47% disagreeing. Agreement in Europe was highest in Sweden (74%), Romania (59%), Portugal (54%), Germany, and the United Kingdom (both 52%). Disagreement was highest in Spain (58%) and France (54%).

Forty-four percent of Turkish respondents agreed that immigrants help create jobs; 49% disagreed.

MEDITERRANEAN COUNTRIES HAVE MIXED FEELINGS ON IMMIGRATION

While the number of people trying to enter the EU illegally dropped by nearly half in 2012 (according to the EU border agency Frontex¹), some concerns remain common among the Mediterranean countries, including Turkey, Italy, Portugal, and Spain, with their geographic proximity to North Africa, have faced numerous challenges regarding immigration in the recent years, particularly concerning refugees, asylum seekers, and illegal immigration. Turkey has faced a recent influx of refugees fleeing conflict areas in Syria, Iran, and Iraq. Looking at how these developments are reflected in public opinion on immigration issues, the 2013 data display some similarities across the Mediterranean region, but also some essential distinctions.

In all four countries, majorities are worried about illegal immigration (88% in Portugal, 86% in Italy, 74% in Spain, and 69% in Turkey) and think that their governments have done a “poor” or even “very poor” job in handling immigration policy; Italy (83%) and Spain (74%) were most skeptical. In the *Transatlantic Trends Immigration* survey in 2011, majorities of Spanish and Italian respondents were sympathetic to forced migrants, whether forced by poverty; political, ethnic, or religious persecution; physical harm from armed conflict; or the aftermath of a natural disaster. For those fleeing poverty, the Mediterranean countries in fact showed more support than Germany, France, or the United Kingdom.

Despite the above-mentioned similarities, there are some striking differences in public perception in the region, showing a nuanced and differentiated view of the issue. In Italy, for example, the population deviates from its rather skeptical view on immigration when it comes to its economic effects: majorities of Italian respondents said that immigrants do not take jobs from native born Italians (67%), and 71% believed that immigrants can help to fill jobs. Italian respondents also said that immigrants are integrating well or even very well into Italian society (60%), particularly their children (66%). Seventy-five percent said that immigrants are not a threat to national culture. In Portugal, 50% responded that immigration is more of an opportunity than a problem; Spanish respondents split evenly – 44% said that immigration is more of an opportunity, 44% said it is more of a problem. Further, even among respondents who said that they or their families were personally affected by the economic crisis, 52% in Portugal still considered immigration an opportunity.

In general, apart from Turkey, Mediterranean countries consider legal immigration much less problematic than illegal immigration.

1 http://www.frontex.europa.eu/assets/Publications/Risk_Analysis/Annual_Risk_Analysis_2013.pdf

When asked whether “immigrants are a burden on social services,” majorities in the United States (57%, but down six percentage points from 2011) and Europe (50%) said that they are. Agreement was highest in Slovakia (71%), France (57%), Poland (57%), and the U.K. (56%, but down seven percentage points from 2011). Disagreement was highest in Spain (55%, up 16 percentage points from 2011), Romania (53%), and Sweden (51%).⁵

5 See also *Transatlantic Trends: Immigration* 2010, opinion on access to state-sponsored healthcare for legal and illegal immigrants.

Sixty-nine percent of respondents in Turkey felt that immigrants are a burden on social services; only 25% disagreed.

When asked whether “immigrants are a threat to our national culture,” however, two-thirds majorities in Europe (69%) and the United States (64%) said that they are not. Disagreement ran highest in Spain (80%), Germany (77%), Italy (75%), Romania (75%), and Portugal (74%). The highest numbers of respondents to agree that immigrants are a threat to national culture were found in Turkey (55%) and the United Kingdom (46%). After years of public debate about

immigration as a cultural threat in the Netherlands and France, only one-third of respondents in the Netherlands (33%) and France (34%) agreed that immigrants are a threat to the national culture.

When asked whether “immigrants enrich our culture,” two-thirds majorities in the United States (69%) and Europe (60%) said that they do. Agreement was highest in Sweden (82%), Germany (71%), Portugal (68%), the Netherlands, and Spain (both 66%).

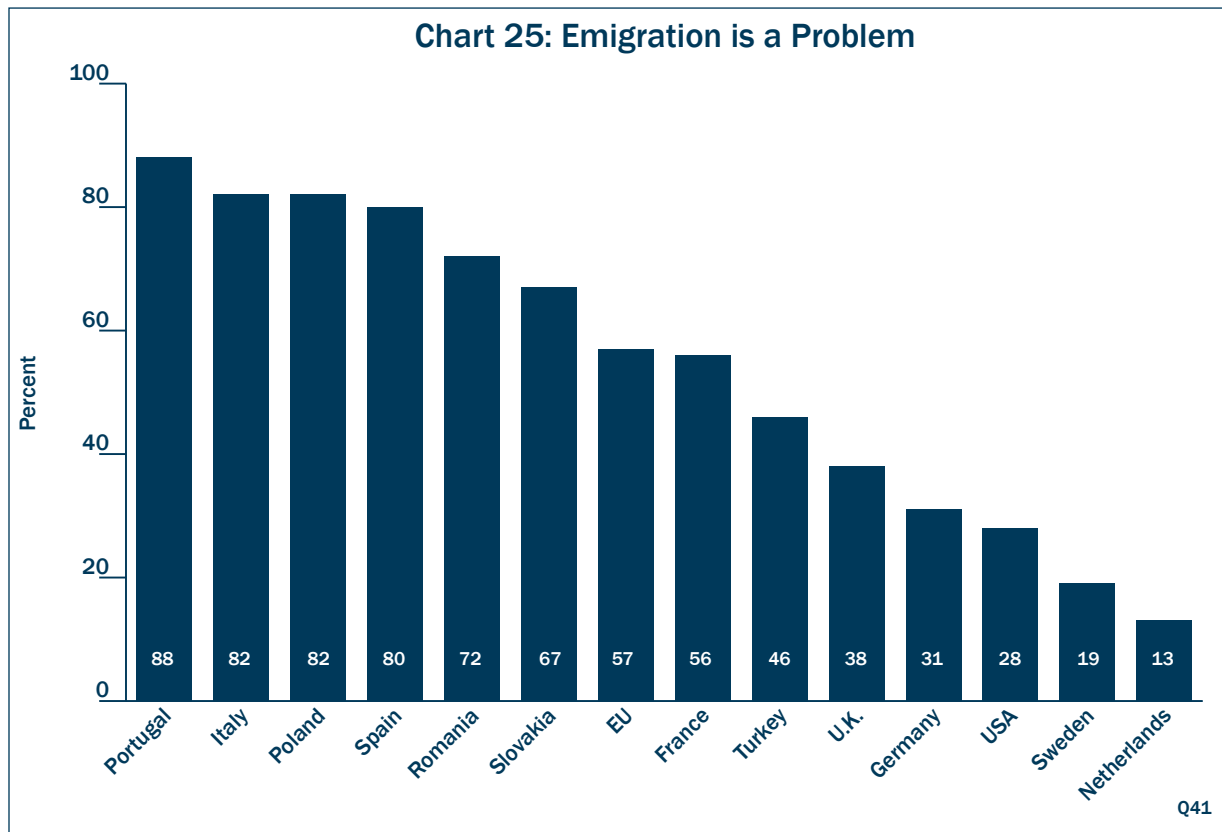
Sixty-one percent of Turkish respondents said that immigrants do not enrich their country’s culture; 33% said that they do.⁶


⁶ Compare Question 16 in *Transatlantic Trends: Immigration 2011*: asked whether they thought immigration enriched national culture with new customs and ideas or had a negative impact, majorities in all countries surveyed (United States: 55%, Europeans: 58%) agreed. In the U.K. only, a majority of respondents (50%) states that immigration had a negative impact.

IS EMIGRATION A PROBLEM? AMERICANS SAY NO, EUROPEANS DISAGREE

Asked whether emigration was a problem for their country, two-thirds of U.S. respondents (69%) said it was not, whereas 57% of Europeans said it was. The highest agreement levels in Europe were found in Portugal (88%), Italy (82%), Poland (82%), Spain (80%), and Romania (72%) — all of which are currently experiencing high emigration levels. Respondents in the Netherlands (86%), Sweden (77%), and Germany (68%) were most likely to say that emigration was not a problem for their country (see Chart 25).

In Turkey, respondents were evenly split between those who saw emigration as a problem (46%) and those who disagreed (45%).





Section Five: Turkey

The past year found Turkey facing two separate challenges, one external and one internal. The first was with its neighbors. As Syria has continued to disintegrate as a state, Turkey has had to absorb greater and greater numbers of refugees, forcing it to play a role in a conflict its government has preferred generally to avoid. Turks have observed the conflagration in Syria — and the uncertainty in the West over how to address it — with the knowledge that any outcome would inevitably spill over into their country.

The second was with its own government, as domestic unrest turned into open conflict in the late spring. While the protests in Turkey began in response to planned urban development, they grew to encapsulate a growing unease with the Turkish government's stances on religion, free speech, and organized opposition.⁷

TURKEY AMBIVALENT ON DOMESTIC POLICY...

In 2013, Turks were less likely to say that they were personally affected by the economic crisis (62% said they were somewhat or greatly affected, compared to 69% last year and 78% in 2009) and more likely to say their economic system was fundamentally fair (23%, compared to 16% last year) — in contrast to the general trend in Europe. While an increasing number of Turkish respondents have described themselves as unaffected by the economic crisis — 33% in 2013, up from 27% last year and 18% in 2009 — Europeans have been less and less likely to say the same; 34% of Europeans said they were unaffected by the crisis this

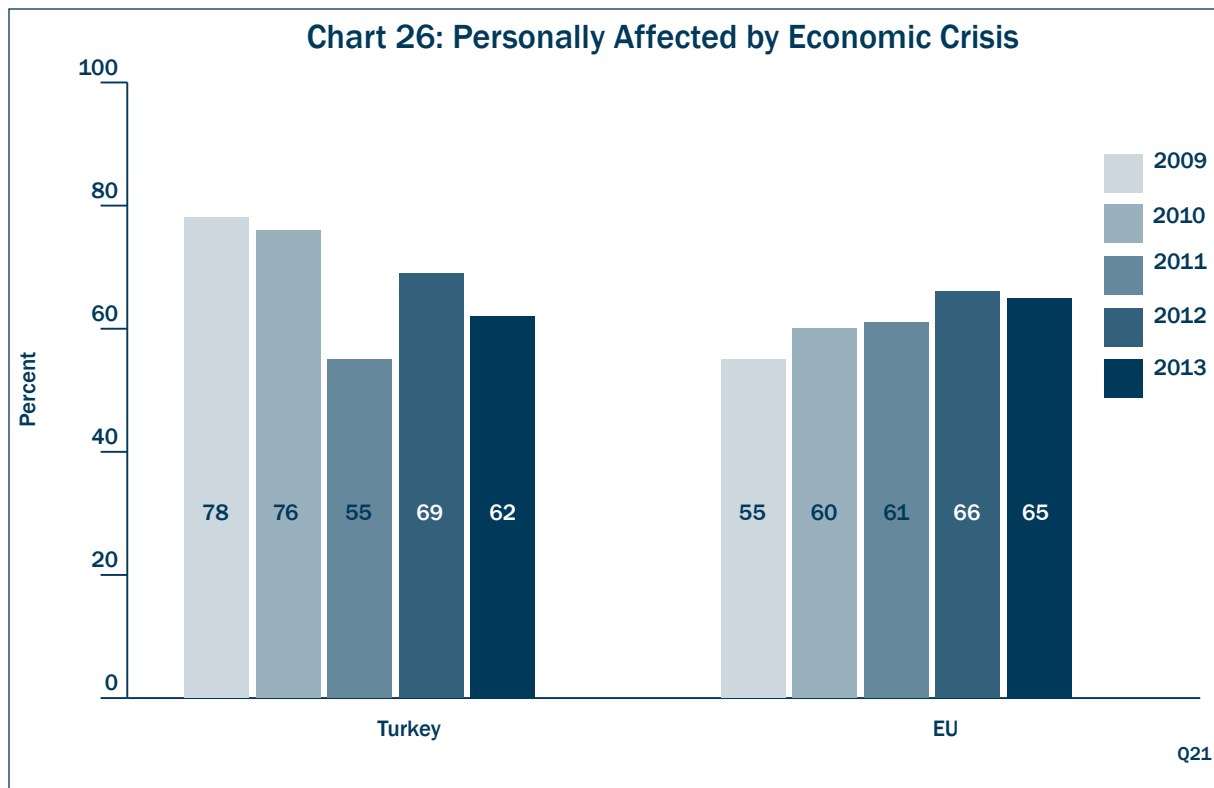
year, compared to 44% in 2009. Similarly, while the number of Turks who believe their economic system is unfair dropped from 72% to 69%, the number of Europeans saying the same grew from 77% to 82%.

The economic crises also drove attitudes toward other domestic issues, including immigration. A majority (64%) of those who felt personally affected by the economic crises also considered immigration to be a problem (only 16% saw it as an opportunity). Of those not affected by the economic crisis, 47% considered immigration to be a problem while 26% perceived it as an opportunity (see Chart 26).

At the same time, Turks are less happy with their government's economic leadership than ever before. Forty-three percent, down from 55% last year and 47% in 2011, approved of their government's handling of the economy, while 52%, up from 38% last year and 45% in 2011, disapproved. The same pertains to the government's management of immigration: 61% of respondents stated that their government was doing a poor job, while 29% disagreed.

And while a plurality of Turkish respondents said that their government should maintain current levels of spending — 39%, compared to 22% in the United States and 30% in the EU — they were significantly less satisfied when asked about specific spending priorities. Fifty percent of Turks want increased defense spending, compared to 32% who want to maintain current levels. Fifty-nine percent want increased welfare state programs, compared to 30% who want to maintain current levels. Sixty-six percent want increased science and education spending, while 23% want to maintain current levels. And 62% want

⁷ Note: due to anti-government protests in Turkey, fieldwork was temporarily suspended there and did not finish until July 2.



increased transportation and infrastructure spending, compared to 28% who want to maintain current levels.

...BUT INCREASINGLY CONFIDENT INTERNATIONALLY

Even as Turkish respondents expressed dissatisfaction with their government’s economic policy, they approved of their government’s international policies with greater frequency — and consistency — than respondents in the United States and Europe. Fifty-one percent of Turks, unchanged since last year and up six percentage points since 2011, approved of their government’s handling of international policies, compared to 41% of Americans and 50% of Europeans; 42%, up from 39% last year but down from 47% in 2011, disapproved, compared to 52% of Americans and 45% of Europeans.

Turkish respondents still favored joining the European Union, but their desire to do so has cooled considerably over the past decade. Forty-four percent

of Turkish respondents said that it would be a good thing, down from 48% last year and 73% in 2004. Thirty-four percent, up from 29% last year and 9% in 2004, said that it would be bad. But Turkey remains more enthusiastic about joining the EU than most EU member states are about accepting it as a member. Twenty percent of European respondents said that Turkey’s accession would be good, while 33% said it would be bad and 37% said that it would be neither good nor bad.

Part of Turks’ enthusiasm for the EU may be traced to the same economic concerns that color their judgment of their own government. Forty-six percent of Turkish respondents, up 19 percentage points since last year, approved of the EU’s handling of the economic crisis, compared to 35% who disapproved (and the 43% who approved within the EU itself).

At the same time, Turks were alone in their skepticism of increased transatlantic trade. Twenty-eight percent of respondents in Turkey, compared to 49% in the United States and 56% in the EU, said that

increased trade would help their economy grow, while 43%, compared to 39% in the United States and 32% in the EU, were concerned that it would render their economy more vulnerable.

In fact, despite Turkey's European aspirations, Turkish respondents were most likely to say that Turkey should act alone rather than in cooperation with the EU, the United States, or its regional neighbors. Thirty-eight percent of Turkish respondents said that Turkey should act independently on international matters; 21% said Turkey should cooperate with the EU. Eight percent of Turks said Turkey should cooperate with the countries of the Middle East, a drop of 12 percentage points from last year.

TURKEY DIVIDED ON NATO, WANTS FREEDOM TO ACT ALONE

Turkish respondents remained divided on NATO, with 39% saying it is still essential and 39% saying it is not (compared to 38% and 39% last year, respectively). *Those who still believed in NATO's importance* cited the community of democracies it represents as the most significant reason (30%), followed by NATO's ability to distribute the burden of military action (27%). An overwhelming majority of *those who said that NATO is no longer essential* — 70% — said that Turkey should be able to make its own military decisions.

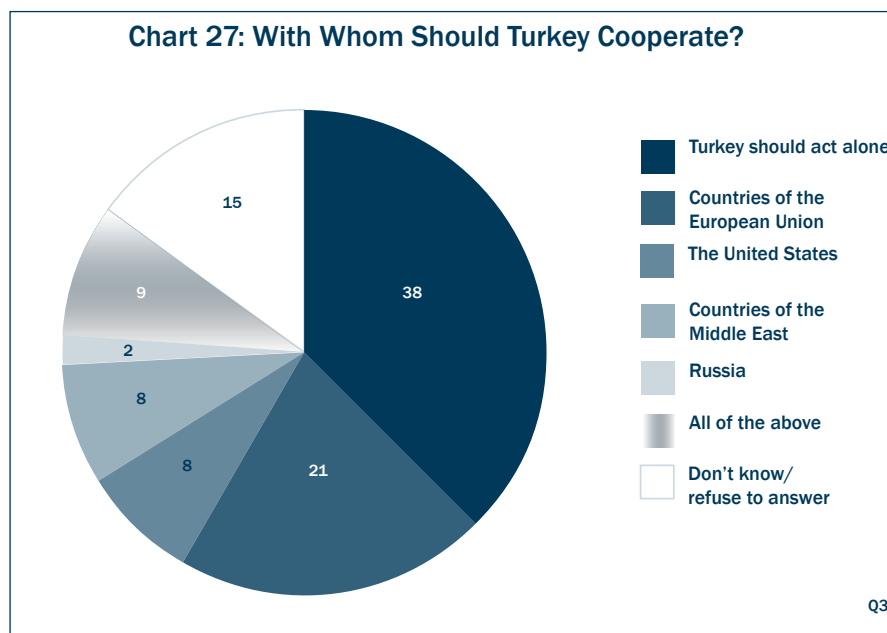
Still, Turkish respondents have shifted to the transatlantic consensus on Iran: a plurality (27%) wants to use economic sanctions to persuade Iran to abandon its nuclear program, the same option chosen by pluralities in the United States (29%) and EU (32%). Twenty-two percent of

Turkish respondents would accept that Iran could acquire nuclear weapons.

When asked about Syria, Turkish respondents were even less enthusiastic about intervention than last year. Seventy-two percent said that Turkey should stay out completely, compared to 57% in 2012, while 21% said that Turkey should intervene, compared to 32% in 2012. Turks were also opposed to the maintenance of a residual force in Afghanistan — 51% disapproved, versus 37% who were in favor — and strongly against the use of drones. Sixty percent disapproved of drone use, of which a significant portion (42% of the overall total) voiced strong disapproval, while 29% approved (see Chart 27).

TURKEY WORRIED ABOUT IMMIGRATION, WHETHER LEGAL OR ILLEGAL

In Turkey, general attitudes about immigration appeared to be pessimistic. Fifty-four percent saw immigration as more of a problem, while only 18% saw it as an opportunity. Twelve percent thought it was both. Turks are worried by legal as well as illegal immigration; a two-thirds majority of Turks (60%) said that they were worried about legal immigration, while only 33% disagreed. Turkish concern about



illegal immigration (69%) was in line with feelings in Europe (71%). Only 23% of Turkish respondents said they were not worried about illegal immigration.

Most of the recent public debate on immigration in Turkey was dominated by temporary migration. Turkey has recently faced an increased influx of

asylum seekers, mostly from Iraq and Iran, and has granted temporary protection to around 140,000 Syrian refugees. Asked what they thought the share of immigrants in their country was, Turkish respondents guessed 21.2%; the actual number is 2.0%.



TRANSATLANTIC TRENDS

Transatlantic Trends is a comprehensive annual survey of U.S. and European public opinion. Polling was conducted by TNS Opinion from June 3-27¹ in the United States, Turkey, and 11 European Union member states: France, Germany, Italy, the Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden, and the United Kingdom. The survey is a project of the German Marshall Fund (GMF) and the Compagnia di San Paolo, with additional support from the Barrow Cadbury Trust, Fundação Luso-Americana, the BBVA Foundation, the Communitas Foundation, and the Swedish Ministry for Foreign Affairs.

The advisory committee for the survey included Pierangelo Isernia, professor of political science, University of Siena (Italy); Richard Eichenberg, associate professor of political science, Tufts University (United States), and Nicolás Russo Perez, program manager, Compagnia di San Paolo (Italy). For Section Four (Mobility, Migration and Integration), the additional

advisers were Susan Martin, executive director, Institute for the Study of International Migration, Georgetown University; Claudia Diehl, professor of microsociology, University of Konstanz; and Ayesha Saran, programme manager, Barrow Cadbury Trust.

The authors of the Key Findings Report were Constanze Stelzenmüller, senior transatlantic fellow and project lead for *Transatlantic Trends*, and Josh Raisher, program coordinator for *Transatlantic Trends*. Astrid Ziebarth, director, Immigration and Integration Program, and Tanja Wunderlich, senior transatlantic fellow, shaped Section Four of the Key Findings report, and made important contributions to the project coordination and overall analysis of the data. We wish to acknowledge the invaluable help of Kaat Smets, postdoctoral researcher at the University of Siena (Italy). Bridget Parker and Anika Meister were responsible for visual presentation of survey data and provided other essential help during the preparation of this report.

¹ Due to protests in Turkey, fieldwork was temporarily suspended and did not finish until July 2.



TRANSATLANTIC TRENDS
www.transatlantictrends.org

A project of the German Marshall Fund of the United States and the Compagnia di San Paolo,
with additional support from the Fundação Luso-Americana, the BBVA Foundation, the Communitas
Foundation, the Swedish Ministry for Foreign Affairs, and the Barrow Cadbury Trust.