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Transatlantic Trends

TRANSATLANTIC TRENDS

Key Findings 2011

Transatlantic Trends 2011 Partners

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TRANSATLANTIC TRENDS

Foreword

This year marks the 10th anniversary of *Transatlantic Trends* surveys, which started in 2002 as *World Views*. During this decade, *Transatlantic Trends* has become the pre-eminent source of U.S. and European public opinion on a host of transatlantic issues, including common foreign policy challenges, support for NATO, the economy, and the rise of other world powers. The data provided by the surveys have become an invaluable tool for policymakers, members of the media, think tank officials, and academics who have an impact on foreign policy decisions within their respective countries. In addition to 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 decade reflected by our polls has been a very tumultuous one for both Europe and the United States, one that has been marred by a very marked divide between the two sides of the Atlantic about the U.S. intervention in Iraq, the alliance's role in Afghanistan, and the global economic crisis. Nothing has been more emblematic of the transatlantic relationship than how Europeans related to the two U.S. presidents of this time. The low approval of George W. Bush's management of foreign policy quickly turned into euphoric optimism when Barack Obama was elected in 2008. This almost overnight change of public opinion toward the U.S. president demonstrated that the basics of transatlantic cooperation remained strong and had not eroded during Bush's presidency, despite his unpopularity among the European public.

Sweden has been added to the *Transatlantic Trends* survey this year, and as you will see in the data, it is a welcome addition. It is the first Nordic country and first non-NATO member to be included in *Transatlantic Trends* — adding new perspectives and geographical 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



TRANSATLANTIC TRENDS

Executive Summary 2011

In a year of tumult and upheaval, with political revolutions in the Middle East and North Africa, natural catastrophes in Japan, economic turmoil in Europe and the United States, the killing of Osama bin Laden, and heated debates over NATO, *Transatlantic Trends* paints a picture of a complex relationship between the United States and Europe and how they respond to global challenges. *Transatlantic Trends* shows that people respond to complexity with nuance rather than simplification.

In the context of mounting global challenges, the survey uncovered some remarkable findings. Among others, four stand out: Americans' growing focus on Asia; EU respondents' steadfast support for the European Union in the midst of crisis; the growing transatlantic convergence on security policy; and that the views of Swedish respondents, included in *Transatlantic Trends* for the first time, differ from other Europeans' perspectives in some important ways.[1]

Asia: For the first time in its ten-year history, *Transatlantic Trends* data now suggest that a shift of alignment away from Europe may be under way as Americans turn toward Asia. A majority of Americans reported that their national interests lie more with the countries of Asia, such as China, Japan, and South Korea, than with the countries of the EU. In contrast, a majority of those in the EU countries polled reported that the United States is more important to their national interests than the countries of Asia.

European Union: The euro crisis did not seem to undermine faith in the EU as an economic unit. The majority of those in the EU felt that EU membership had helped their country's economy. Nevertheless, a plurality or majority in every EU country surveyed, with the exception of Germany, were reluctant to give the EU more power over national budgets and finances. While the EU is seen fairly positively, the majority of EU respondents agreed that using the euro either had been or would be a bad thing for their country's economy. The euro was particularly unpopular in those countries surveyed outside the eurozone, while opinions within the eurozone varied.

Security Policy: While a transatlantic opinion gap still exists on some security topics, the survey also revealed important shifts in public opinion on some key security policies. These shifts resulted in a convergence of EU-U.S. opinion on the best way forward. Marking a sharp increase over last year in the United States, this year's survey showed an equally solid majority in the United States and the EU wanting to reduce troop levels or withdraw all troops from Afghanistan. Despite outgoing U.S. Secretary of Defense Robert Gates' harsh words about the future of NATO, a solid majority in both the EU and the United States reported that they see NATO as essential for their security, and pluralities in the EU and the United States would like to see their governments maintain current levels of defense spending.

Sweden: Sweden's first year in the survey revealed that the country's public opinion stood apart from other EU countries on a number of issues. The Swedes were the most likely to approve of their government's handling of foreign policies and the least likely to be affected by the economic crisis. Compared to other Europeans, the Swedes were more willing to maintain troops in Afghanistan, more supportive of the intervention in Libya, and more likely to promote

[1] This year's survey includes the United States, Turkey, and 12 EU countries: Bulgaria, France, Germany, Italy, the Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden, and the United Kingdom. When the report refers to EU opinions, it is only meant to refer to the opinions of those in the 12 EU countries surveyed.

democracy in the Middle East and North Africa. At the same time, the Swedes were evenly divided on whether cooperating with NATO was essential for their own security.

Transatlantic Trends has asked a number of new questions this year. For the first time, respondents rated their own government's handling of international affairs. A series of questions was dedicated to the volatile situation in the Middle East and North Africa.

Middle East and North Africa: With regard to the international military intervention in Libya, there was often a greater divide among EU countries than between each side of the Atlantic. On average, just under half those in the EU approved of the intervention by international forces in Libya. Optimism about stabilizing the situation in Libya was much lower across the board than approval for the intervention. While Americans remained wary of democracy promotion abroad, Europeans were largely in favor of the idea. It should be noted that polling was conducted in May and June 2011, before more recent Libyan rebel victories. There was also a transatlantic difference on the best approach to help resolve the Arab-Israeli conflict. A majority of Americans preferred to put more pressure on the Palestinians, while a plurality of those in the EU preferred putting more pressure on the Israelis.

Government Approval: This year, for the first time, *Transatlantic Trends* asked how people viewed their own governments' handling of international policies. When it came to general handling of international affairs, governments across the board evoked the approval of around half of their citizens.

The set of questions that *Transatlantic Trends* asks every year continues to produce remarkable findings, especially when it comes to the views that American and Turkish respondents hold on international relations.

United States: The survey showed a very strong partisan divide in the United States over Barack Obama's handling of international policies. Republicans were four times less likely than Democrats to approve of Obama's handling of international policies, and there was an even larger gap when it came to his handling of the U.S. economy.

Turkey: Although Turkish feelings for the EU and United States warmed somewhat over the past year, a majority of Turks still view the EU and the United States unfavorably. However, the plurality of Turks thought that working with the countries of the Middle East was more important to their economic and security interests than working with countries of the EU. At the same time, fewer than half of the EU respondents felt that Turkey's accession would benefit the EU economically or promote peace and stability in the Middle East. Only about one-third of the EU public believed that Turkey does not belong in the EU either because it is a predominantly Muslim country or because it is either too poor or too populous to join the EU.

KEY FINDINGS OF THE SURVEY INCLUDE:

Transatlantic Relations and U.S. Leadership

- Marking a slight decline from 2010, 75% of people in the 12 EU countries polled approved of Obama's handling of international policies but his approval has dropped 17 percentage points in Spain (68%), 13 points in Slovakia (58%), and 12 points in France (76%) and Italy (79%) since 2009.

- A little over half of the EU residents polled (54%) said it was desirable that the United States exert strong leadership in world affairs.

- U.S. public opinion is strongly polarized: 85% of the Democrats approved of Obama's handling of international policies, but Republicans were four times less likely to approve (21%).

- Seventy-three percent of the EU respondents approved of Obama's efforts to fight international terrorism.

- When it came to general handling of international affairs, governments across the board won the approval of around half of their citizens, showing a 54% approval rate in the EU, 50% in the United States, and 45% in Turkey. In the EU, approval rates ranged from Spain (39%) on the low end to Sweden (74%) on the high end.

Global Views

- A majority of Americans said the countries of Asia (51%) were more important to their national interests than the countries of the European Union (38%).

- Young people in the United States viewed China more positively than older Americans and were much more likely to say the countries of Asia are more important for U.S. interests.

- A majority of EU respondents (52%) thought that the United States was more important to their national interests than the countries of Asia (37%). Responses varied greatly among the EU countries surveyed.

- A slight plurality in the EU (46%) thought China was more of an economic opportunity than a threat (41%), but a majority in the United States (63%) viewed China as more of an economic threat.

- Pakistan was the least popular country asked about in the survey with around one-in-four (26%) in the EU and one-in-five (18%) in the United States holding favorable views of the country.

The Economy

- People are still hurt by the economy: 82% of the Americans and 61% of those in the EU reported being personally affected by the economic crisis. The EU numbers ranged from 31% in Sweden to 89% in Bulgaria.

- The majority of EU respondents (67%) considered membership in the EU to be a good thing for their countries' economies, but the majority (53%) thought that using the euro had been or would be a bad thing for their economies.

- A plurality or majority in every EU country, with the exception of Germany, were reluctant to give the EU more power over national budgets and finances. Sixty percent of EU respondents thought it acceptable that their countries contribute to a fund that would help bail out member states with budgetary difficulties.

Transatlantic Security

- For the first time, a majority of Americans (56%) were pessimistic about the prospects of stabilizing Afghanistan; EU pessimism remained high (66%).

- For the first time, the majority of U.S. (66%) and EU (66%) respondents agreed that troop levels should be reduced or troops should be withdrawn altogether from Afghanistan.

- NATO is still seen as essential by 62% of both EU and U.S. respondents.

- The Swedes were evenly split about the North Atlantic military alliance, with 47% saying it was important for

their security to cooperate closely with NATO and 48% saying it was not important.

- When asked about defense spending, a plurality in 10 of the 14 countries surveyed wanted to maintain current spending levels.

- The vast majority of those in the EU (75%) and the United States (76%) remained concerned about Iran acquiring nuclear weapons, and pluralities on both sides of the Atlantic preferred using economic sanctions or incentives to stop Iran's nuclear program.

Libya and the Transatlantic Role in the Middle East and North Africa

- Regarding the intervention in Libya, EU respondents were, on average, evenly divided, with 48% approving and 47% disapproving.

- A majority of U.S. respondents (59%) approved of the international intervention in Libya, but only 31% supported sending U.S. ground troops to assist the rebels who oppose Colonel Gaddafi.

- The majority in the EU (54%) and a plurality in the United States (48%) were pessimistic about stabilizing the situation in Libya.

- U.S. support for democracy promotion (37%) remained low in 2011, down from a majority (52%) in 2005. EU support for democracy promotion remained high at 69%.

- To solve the Arab-Israeli conflict, a majority of Americans (53%) preferred putting more pressure on the Palestinians, while the plurality in the EU (38%) preferred putting more pressure on the Israelis.

Continuity and Change in Turkey

- There was a ten-point increase in the percentage of Turks who thought Turkish membership in the EU would be a good thing (48%), but such support remained much lower than it was in 2004 (73%).

- Half of those in the EU did not agree that Turkey's EU membership would be good for the EU in economic terms.

- A plurality of Turks (27%) said that the country should act alone in foreign affairs, while one-in-five said Turkey should act in closest cooperation with the countries of the Middle East (20%) or the countries of the EU (19%).

- A plurality of the Turks considered Turkey's neighbors in the Middle East as more important to the country's economic interests (43%) and security interests (42%) than countries of the EU.

Transatlantic Trends is a comprehensive annual survey of American and European public opinion. Polling was conducted by TNS Opinion between May 25 and June 17, 2011, in the United States, Turkey, and 12 European Union member states: Bulgaria, 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 of the United States (GMF) and the Compagnia di San Paolo, with additional support from the Fundação Luso-Americana, Fundación BBVA, the Communitas Foundation, and the Swedish Ministry for Foreign Affairs.

The academic advisory committee for the survey included Pierangelo Isernia, professor of political science, University of Siena (Italy); Philip Everts, emeritus director of the Institute of International Studies, University of Leiden (Netherlands); and Richard Eichenberg, associate professor of political science, Tufts University (United States).

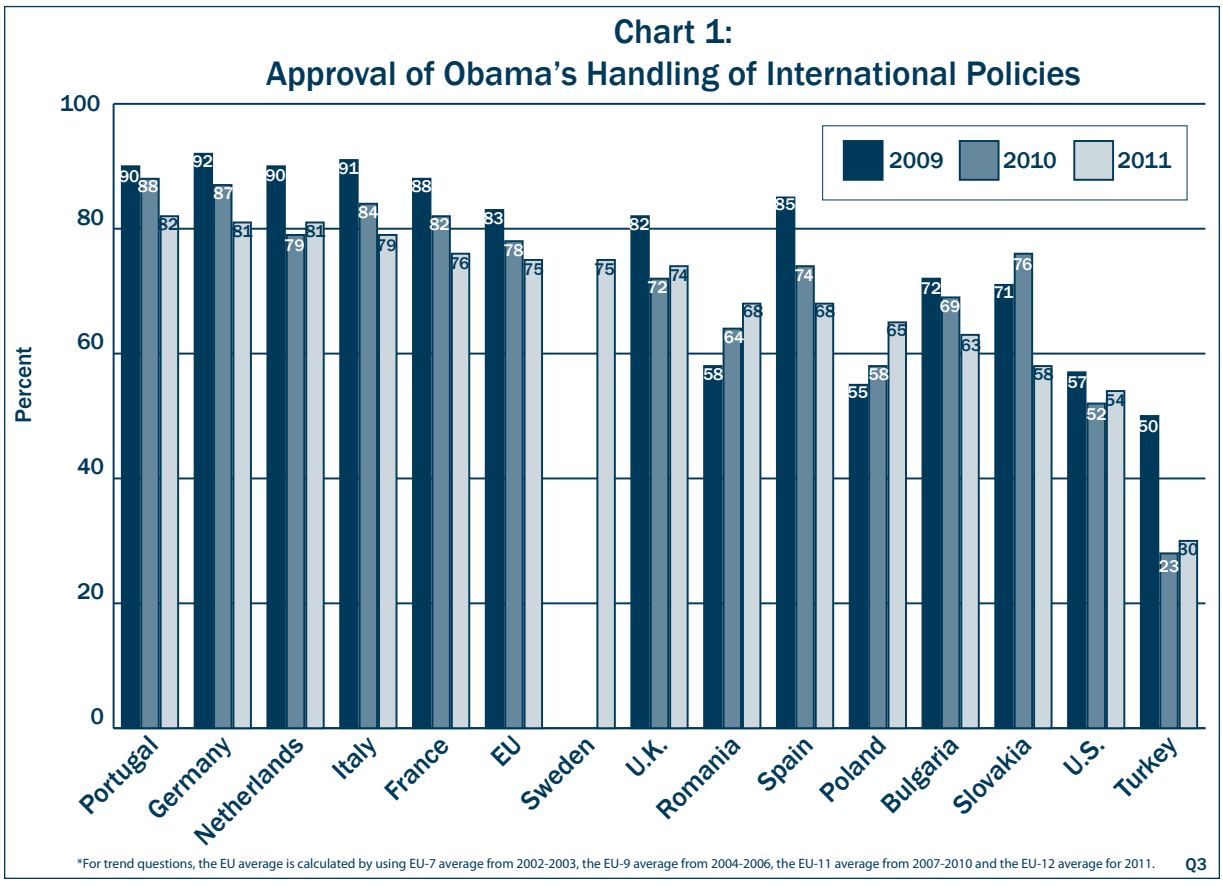
The authors of the key findings report were Zsolt Nyiri, director of *Transatlantic Trends*, and Ben Veater-Fuchs, program associate for *Transatlantic Trends*. The authors wish to acknowledge the invaluable help of Matthew M. Borda, who played a major role in creating the accompanying charts and providing other essential help during the preparation of this report.

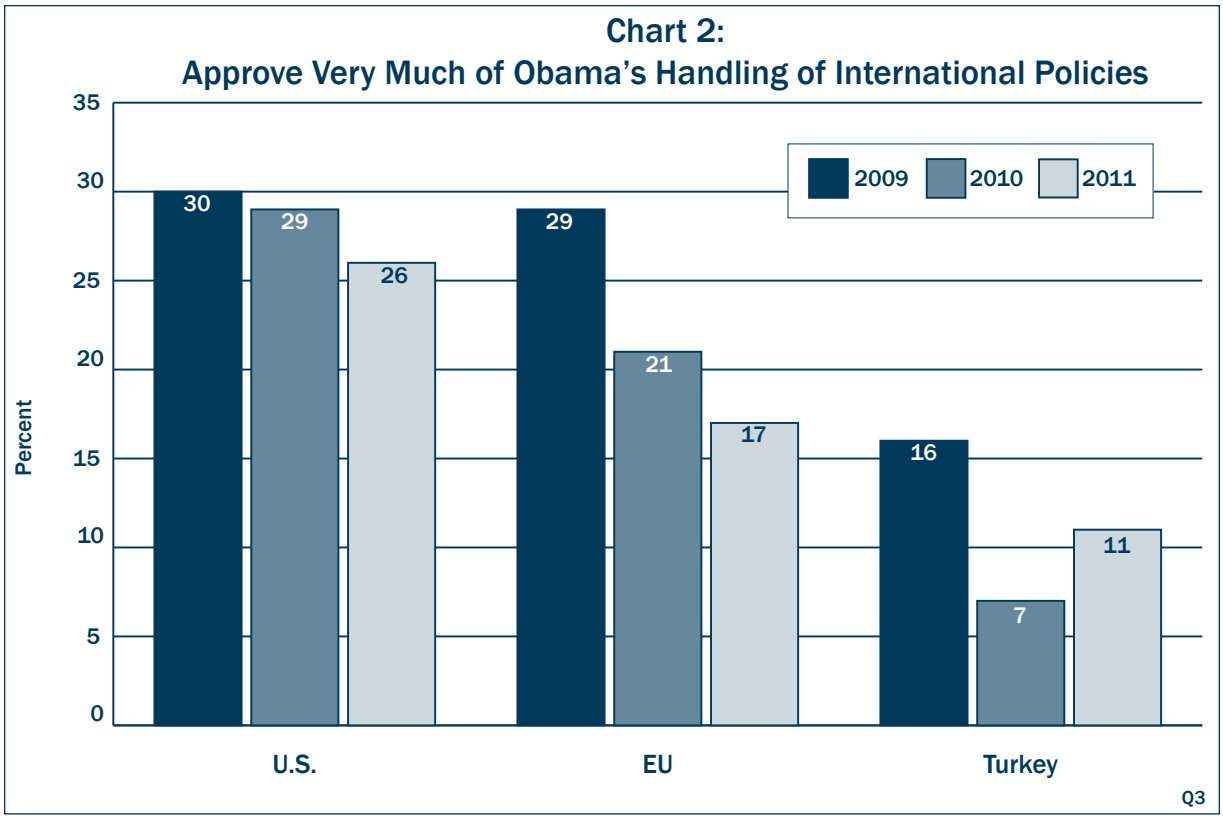
Section One: Transatlantic Relations

Barack Obama's six-day European tour in May was widely covered by the transatlantic media. During his busy visit, Obama attended the G8 summit, met a number of European leaders, and even had the time to enjoy a Guinness in his ancestral home of Ireland. In response to the Arab Spring, Obama suggested Poland as a model for Arab nations undergoing political change, saying its peaceful overthrow of communism held lessons outside of Europe. Prior to his visit to Europe, leaders of the European Council and European Commission praised the U.S. president for the tracking down of Osama bin Laden, the world's most wanted terrorist. Nevertheless, the enormous popularity that Obama had enjoyed in Western Europe after his election continued its slow decline.

OBAMA STILL POPULAR, BUT APPROVAL CONTINUES TO DECREASE AMONG SOME EUROPEAN ALLIES

According to the findings of this year's *Transatlantic Trends* survey, the U.S. president was still very popular in Europe. On average, a very impressive 75% of the population of the 12 EU member countries polled approved of his handling





of international policies.[2] This figure remains much higher than the EU approval levels for George Bush in 2008 (20%) and even higher than EU citizens' approval ratings of their own national governments when it comes to handling international policies (54%).

Nevertheless, in some countries, Obama's approval rating was not nearly as high as it was just after his election (see chart 1). Compared with the results in 2009, for example, Obama's approval dropped 17 percentage points in Spain (68%), 13 points in Slovakia (58%), and 12 points in France (76%) and Italy (79%). Obama's foreign policies were met with the highest levels of approval in Portugal (82%), Germany (81%), the Netherlands (81%), Italy (79%), France (76%), Sweden (75%), and the U.K. (74%). His policies were the least popular in Turkey (30%), the only country where the majority (58%) actually disapproved of his handling international policies. Still, these approval ratings are much higher than those accorded George W. Bush in 2008: about seven times as high in France and Germany, and four times as high in the United Kingdom and Turkey.

On average, majorities in the EU countries surveyed approved of his leadership in foreign policy. In addition to Spain (68%), Central and Eastern European countries showed somewhat lower support compared with the EU average, including Slovakia (58%), Bulgaria (63%), Poland (65%), and Romania (68%). However, Obama's approval increased by seven points over last year in Poland, but decreased by 18 points in neighboring Slovakia during the same time.

Another notable trend this year was the decrease in the intensity of support for Obama (see chart 2). Two years ago, close to three-in-ten (29%) in the 11 EU countries surveyed approved of Obama *very much*. This year, less than one-in-five (17%) expressed intense support for Obama's handling of international policies.

[2] Unless otherwise noted, approval rates are calculated by combining the percentage of respondents who approve "very much" and the percentage of those who approve "somewhat."

OBAMA'S FIGHTING INTERNATIONAL TERRORISM RECEIVED HIGHEST APPROVAL

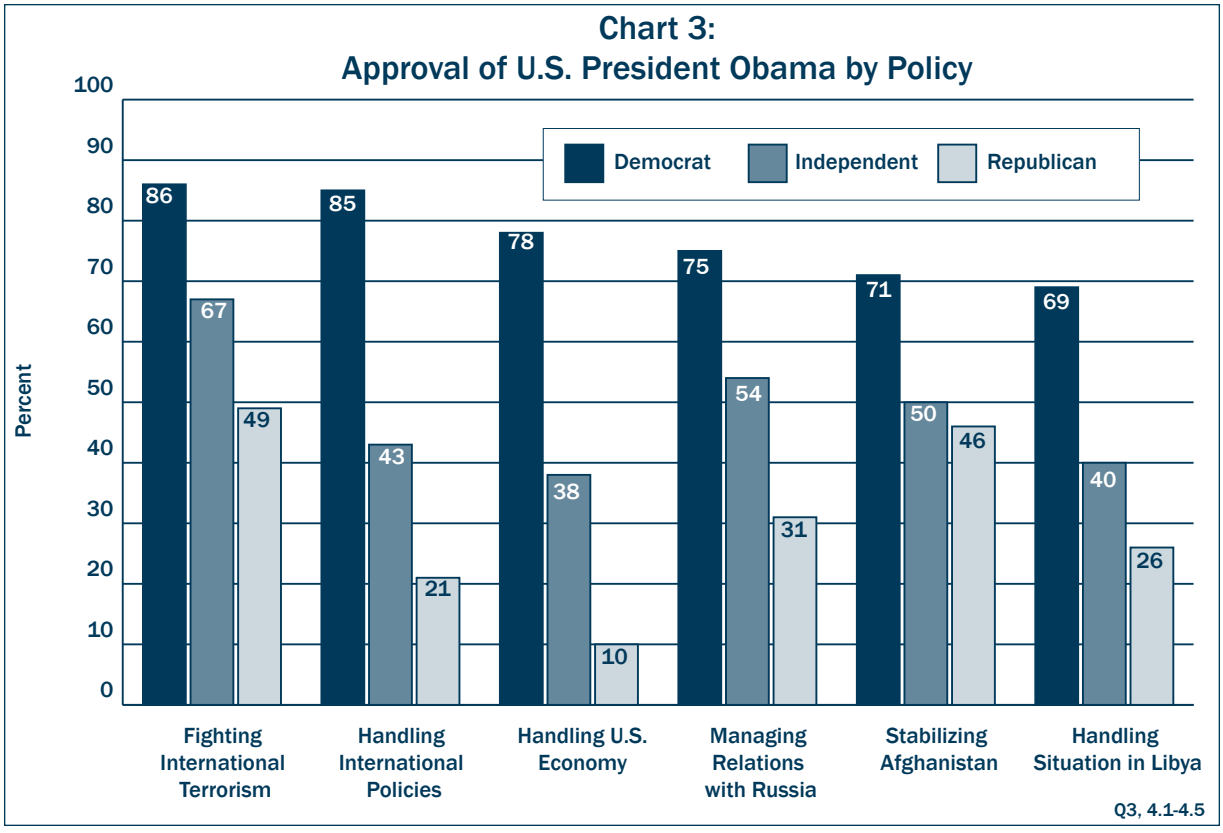
Beyond the general approval of Barack Obama's handling of international relations, the data revealed that Europeans are less likely to approve of the president's specific foreign policies, continuing a trend found last year. Among the foreign policies tested, handling of Libya and efforts to stabilize Afghanistan were the least popular in the EU (see chart 4). On average, about half (51%) of the people in the 12 EU countries polled this year approved of Obama's policies with regard to Libya and Afghanistan. Fifty-eight percent approved of Obama's managing of relations with Russia. The only foreign policy area where his approval was almost as high as his general approval likely involved his administration's success in eliminating al Qaida leader Osama bin Laden. On average in the EU, 73% approved of the American president's fighting of international terrorism.

The Turks were a lot more critical than those in the EU about Obama's specific foreign policies. One-in-six Turks (17%) approved of Obama's efforts to stabilize Afghanistan and one-in-five (20%) approved of his handling of the situation in Libya. Less than one-in-four Turks approved of the U.S. president's management of relations with Russia (23%) and his fight against international terrorism (23%). With regard to the latter, this was a dramatic 50-point difference between his approval in Turkey and the EU average.

DEMOCRATS AND REPUBLICANS CONTINENTS APART: STRONG POLARIZATION AT HOME

While the difference between EU (75%) and U.S. (54%) approval of Obama's handling of foreign policies was striking, even more remarkable was the tremendous polarization of the U.S. public on the same matter. An overwhelming 85% of the Democrats surveyed approved of Obama's handling of international policies, but only 21% of Republicans agreed. Independents' support, at 43%, was closer to that of the Republicans than to the Democrats.

The political polarization of the U.S. public was also apparent in the intensity of Obama's approval. The majority of Republicans (56%) disapproved very much of Obama's



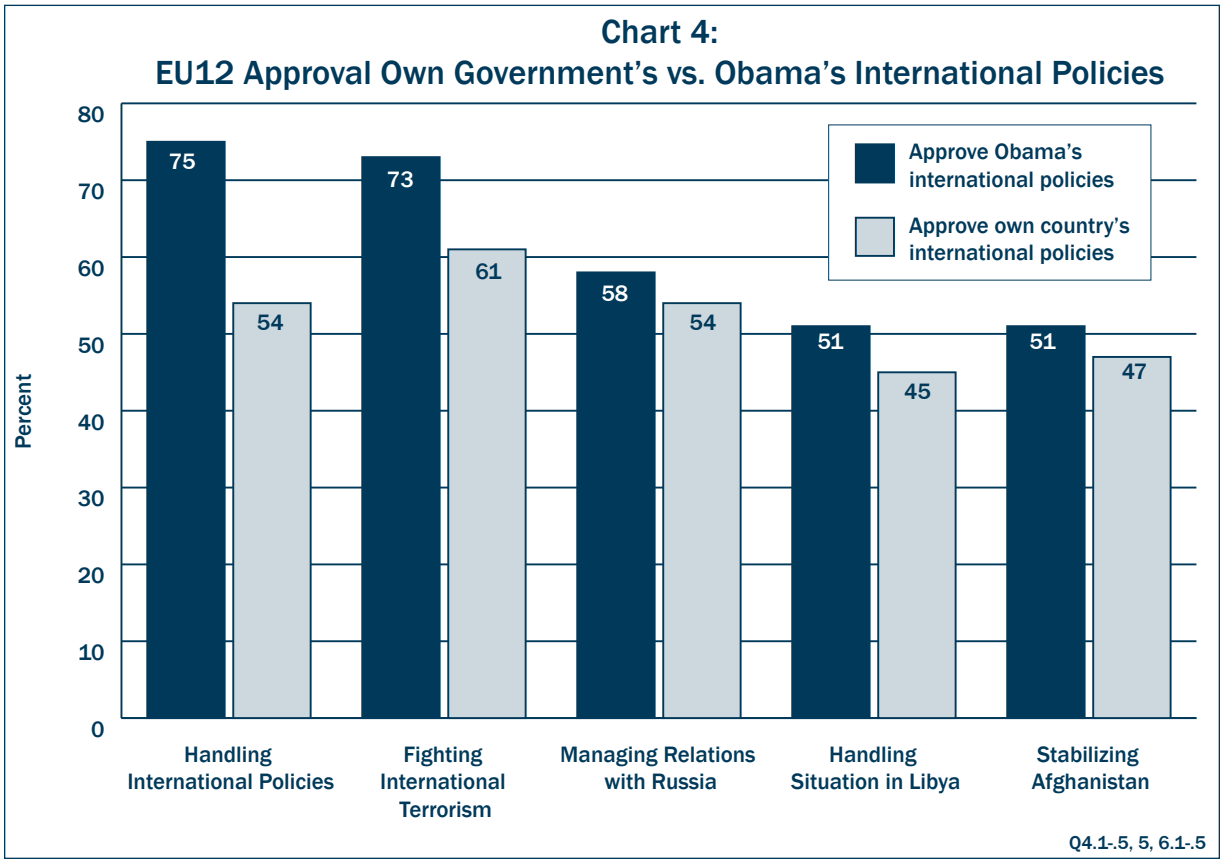
handling of international policies, while the plurality of Democrats (49%) approved very much. Like Europeans, Democrats showed lower levels of approval when it came to specific foreign policies, except for the case of fighting international terrorism, where Democrats had a high level of approval at 86%. Democrats were least likely to approve of Obama's policies in Afghanistan (71%) and Libya (69%) than of other policies. Nearly half the Republicans supported Obama's fighting international terrorism (49%) and 46% approved of his policies in Afghanistan, but only about one-in-four (26%) approved of his policies in Libya. Obama's management of relations with Russia met the approval of 31% of Republicans and 75% of Democrats.

Nowhere else was the polarization of the American public more striking than in Obama's handling of the U.S. economy, the only nonforeign policy topic *Transatlantic Trends* asked about: one-in-ten (10%) Republicans and nearly eight-in-ten (78%) Democrats approved of Obama's handling of the U.S. economy.

MAJORITY APPROVAL OF OWN GOVERNMENT HANDLING INTERNATIONAL AFFAIRS

This year, for the first time, *Transatlantic Trends* asked how people viewed their own governments' handling of international policies (see chart 4). When it came to general handling of international affairs, governments across the board had the support of about half of their citizens, showing a 54% approval rate in the EU, 50% in the United States, and 45% in Turkey. One government in particular, Sweden, received very high marks, with three-in-four (74%) Swedes approving of the way their government handled foreign policy issues. Somewhat behind the Swedish government, but still above the EU average, the German (65%) and the Dutch (65%) governments had above-average approval rates for their handling of foreign affairs. At the other extreme, the Spanish showed the lowest level (39%) of support for their government's foreign policy.

While a majority of EU respondents gave general support to their countries' foreign policies, there was less support for



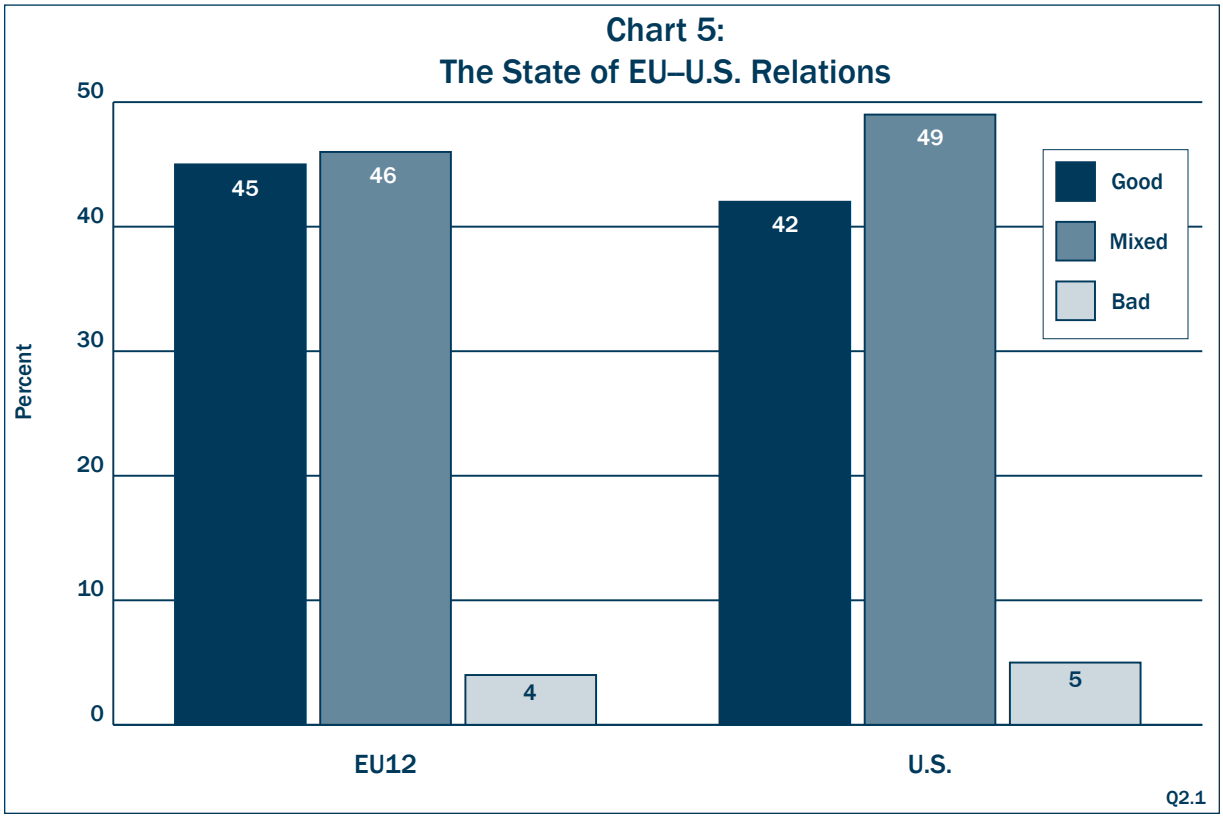
some particular international activities. Most notably, only 45% of the people in the EU approved of their governments' handling of the situation in Libya, but opinions varied greatly within the EU countries surveyed. The Swedes, at 65%, were the most approving of their government's policy toward Libya followed by the Dutch (61%). But just about half of the French (52%) and the British (50%) and 42% of the Germans and Italians supported their governments' policies in Libya. Italy was the only country where a slight majority (53%), rather than just a plurality, disapproved of how their government dealt with Libya. The Turks were evenly divided with 45% approving and 44% disapproving of the Turkish government's handling of Libya.

The greatest support for governments' involved their handling of international terrorism. On average, 61% of the EU respondents and 45% of Turks approved of their governments' efforts against international terrorists. The British were the most approving (72%), followed by the Germans (70%), Portuguese (69%), and Swedes (68%). On the other side of the scale, fewer than half of the Turks and the Poles (45% each) approved of their governments' efforts in this respect.

Governments received the lowest approval with regard to dealing with their countries' economies. Only two-in-five (40%) of those in the EU approved of how their elected leaders were managing the economy. Especially disappointed were the Spanish and the Romanians, with only 18% support. Sweden (68%), Germany (63%), and the Netherlands (62%) were the only countries surveyed where majorities approved of how their governments had been dealing with the economy. In Turkey, a slight plurality (47%) approved of how their government had been handling the economy.

STATE OF TRANSATLANTIC RELATIONS: GOOD OR MIXED, BUT NOT BAD

Across the board, perceptions of the state of the transatlantic relationship are very similar in the EU and the United Sates. In the United States, a slight plurality (49%) felt that relations are mixed and 42% said that relations were



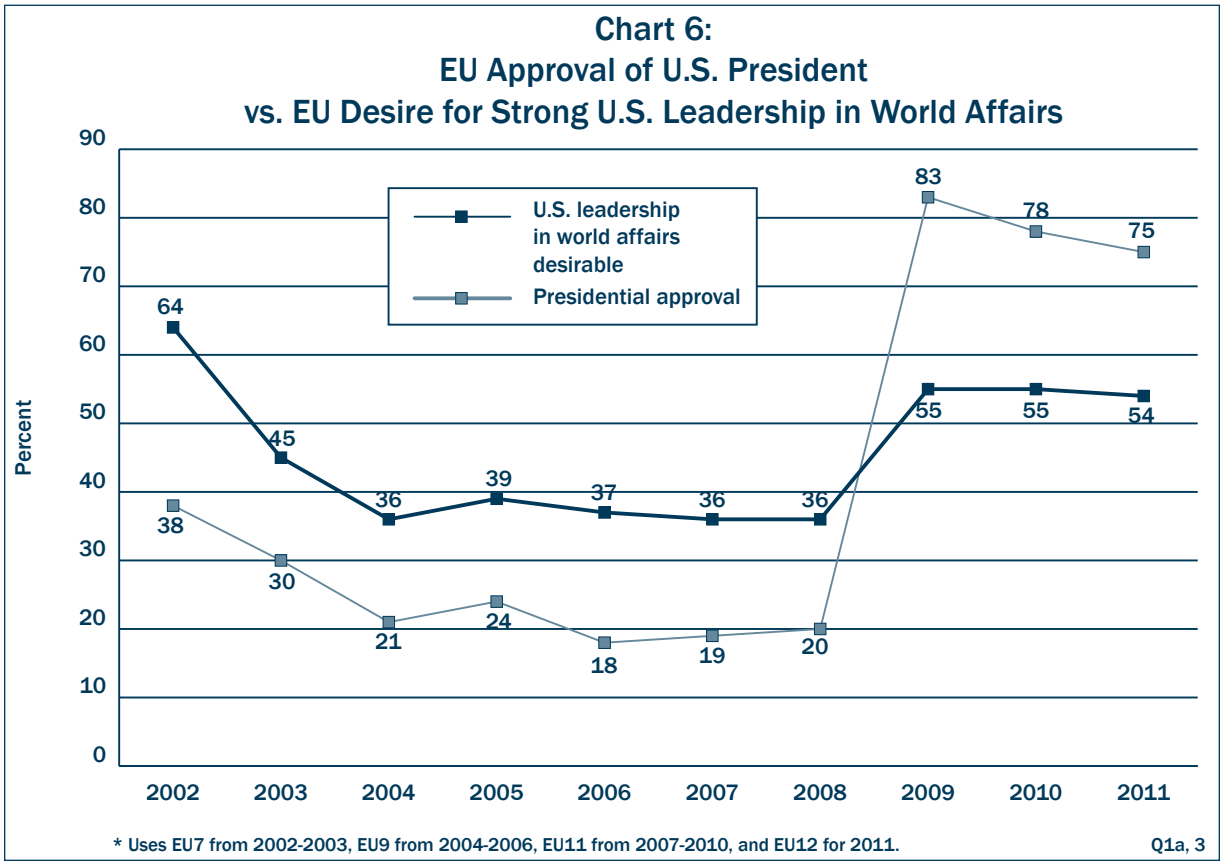
good, down from last year's 54% who said relations were good. Those in the EU were evenly divided about whether relations were mixed (46%) or good (45%) (see chart 5). In the 11 EU countries that were polled in 2010 and 2011, those who described relations as "good" decreased by 12 percentage points. Only Spain (54%) and Germany (55%) had clear majorities saying EU-U.S. relations were good. Nevertheless, very few people described the current state of relations between the two continents as bad — only 4% in the EU and 5% in the United States.

As in previous years, on both sides of the Atlantic, strong majorities (71% in the United States and 68% in the EU) felt that the United States and the European Union had enough common values to be able to cooperate on international problems.

STABLE EU SUPPORT FOR STRONG U.S. LEADERSHIP IN WORLD AFFAIRS

Over half of the EU residents polled (54%) said it was desirable that the United States exert strong leadership in world affairs. While this seems low compared to Obama's popularity, support for strong U.S. leadership in world affairs continues to be much higher than it was under much of the Bush administration (see chart 6). Unsurprisingly, an overwhelming 85% of Americans found U.S. leadership desirable. The majority of Americans (69%) also thought it was desirable that the EU exert strong leadership in world affairs, which was likewise the majority opinion among the EU countries (76%). Only about one-in-five (17%) Turks said U.S. leadership was desirable, while somewhat more (28%) said EU leadership was desirable.[3]

[3] EU averages reflect EU7 from 2002-2003, EU9 from 2004-2006, EU11 from 2007-2010, and EU12 for 2011. See more on trended data in the Methodology section.



Section Two: Global Views

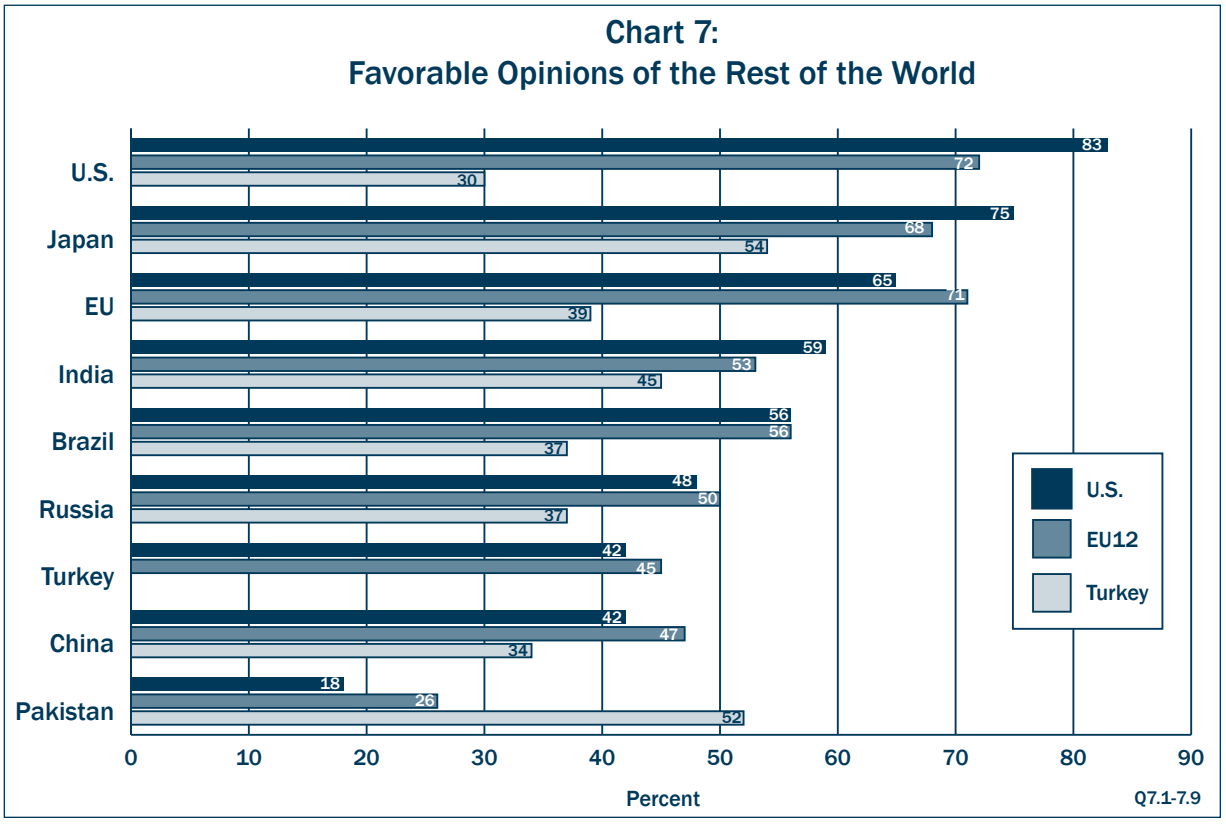
Amid the Arab Spring, the earthquake and nuclear disaster in Japan, the international intervention in Libya, and the killing of Osama bin Laden, global issues dominated the transatlantic agenda over the past year. This year's *Transatlantic Trends* captured public opinion about a broad set of countries that are relevant in world affairs and are intertwined with various facets of transatlantic relations.

EU AND U.S. OPINIONS OF OTHER COUNTRIES SIMILAR, TURKISH VIEWS DIFFER GREATLY

Americans and those in the EU polled by *Transatlantic Trends* in 2011 tended to have similar opinions of each other and of other countries in the world. Turks, however, held distinctly different views on the world. They were less positive about the United States, EU, and China and more approving of Pakistan than others in the survey.

More than four-in-five (83%) Americans had a favorable opinion of their own country (see chart 7).[4] A high percentage of the Americans (75%) also held a favorable opinion of Japan. Nearly two-thirds of Americans (65%) had favorable

[4] Unless otherwise noted, favorability rates are based on combining the percentage of respondents who have a "very favorable" opinion and the percentage of those who have a "somewhat favorable" opinion.



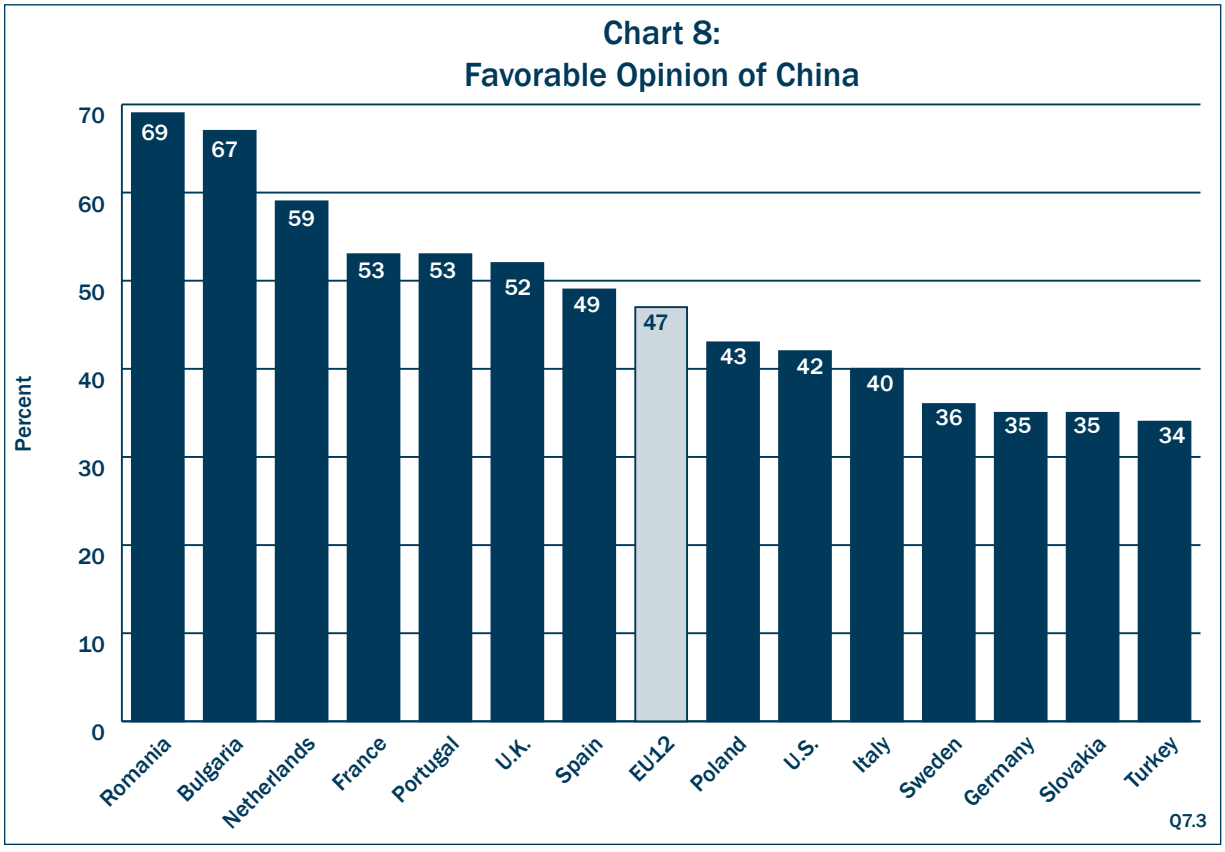
opinion of the European Union. China and Turkey were looked at favorably by 42% of the Americans. Pakistan, where al Qaida leader Osama bin Laden was hiding in almost plain sight before he was killed, was only seen favorably by 18% of Americans.

Pakistan was also the least popular country within the EU. Just one-in-four in the EU (26%) held a favorable opinion of the country. Support was especially low in Sweden (12%), Germany (14%), and Slovakia (16%).

Those polled in the EU had equally favorable opinions of the United States (72%) and the EU (71%). The United States was seen especially favorably in Italy, Romania, and Portugal (81% each) and the U.K. (78%). Relatively fewer people held a favorable opinion of the United States in the Netherlands (62% — a marked decline from last year's 81%) and Slovakia (63%). The Turks were the least supportive of the United States, with only 30% holding a favorable view and 62% holding an unfavorable view. However, when compared with last year, the percentage of Turks favoring the United States increased by eight percentage points and those who held a *very* unfavorable opinion dropped by 11 points.

The EU was seen in the most favorable light in the two newest EU member states of Bulgaria (90%) and Romania (87%). On the other hand, Turks were the least supportive of the EU, with a majority (53%) holding unfavorable views. Still, the percentage of Turks who held favorable views of the EU increased by five points over last year's results.

Overall, favorable opinion of Turkey increased in the European Union and some countries showed markedly positive changes. This year, favorable opinions of Turkey increased by 12 percentage points in France (53%), 10 points in the Netherlands (60%), 11 points in Portugal (52%), 10 points in Poland (49%), and 8 points in Germany (42%) and Italy (33%). During the same period, Americans (42%) were eight percentage points less likely to have favorable opinion of Turkey than they were last year.

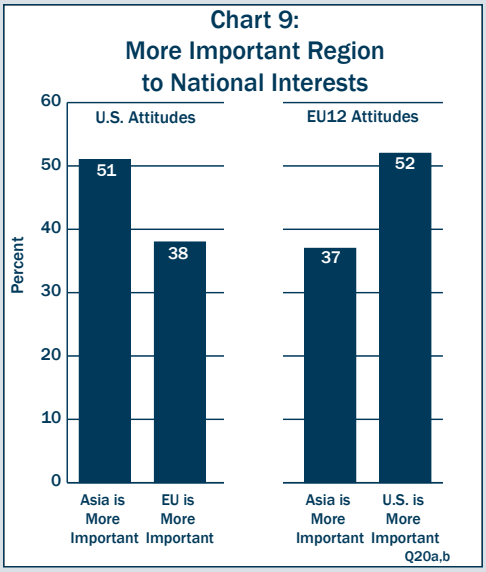


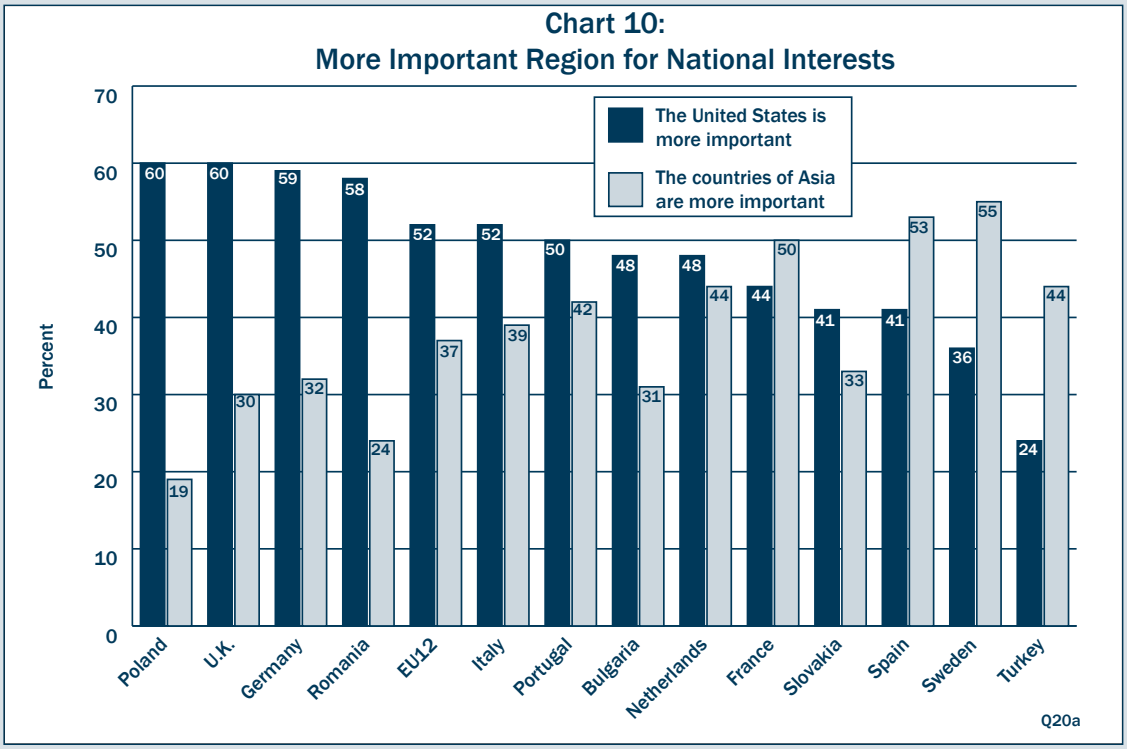
TRANSATLANTIC DIVIDE ON WHERE TO LOOK FOR NATIONAL INTEREST

When asked whether the countries of the European Union or the countries of Asia were more important to their countries' national interests, a slight majority of Americans (51%) and a plurality of Turks (44%) indicated that the Asian countries such as China, Japan, or South Korea were more important. On the other hand, 52% of those living in the EU countries polled thought that the United States was more important to their national interests than the countries of Asia (see chart 9).

This year's results mark a notable reversal in U.S. attitudes from 2004, when a majority of U.S. respondents (54%) viewed the countries of Europe as more important to their vital interests than the countries of Asia (29%).[1]

However, there were important differences among the EU countries when it came to this question (see chart 10). Majorities in Sweden (55%) and Spain (53%) and half the French (50%) felt that Asia was more important to their national interests than the United States. The British and Poles (60% each) as well as the Germans (59%) and Romanians (58%) were the most likely to identify the United States as more important.





[1] In 2004, the question was worded to ask about "vital" interests rather than "national" interests asked about in 2011.

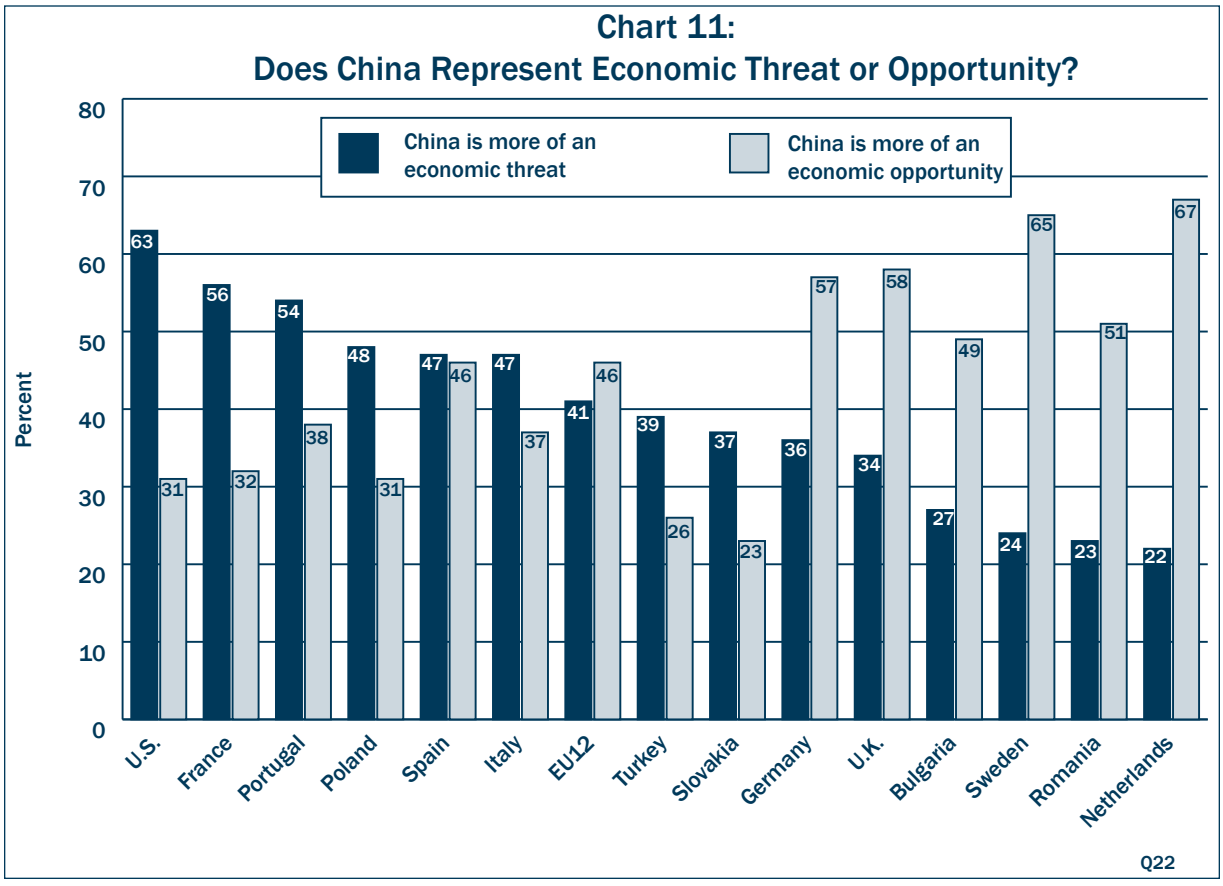
Americans and Europeans were somewhat divided over China. A slight plurality in the EU (47%) held favorable views of China and 44% held unfavorable views. In the United States, 42% held favorable views of China while half the Americans (50%) held unfavorable views. Romanians (69%) and Bulgarians (67%) held the most positive views of China while majorities in Germany (58%), Sweden (57%), Slovakia, and Turkey (54% each) held the most unfavorable views (see chart 8).

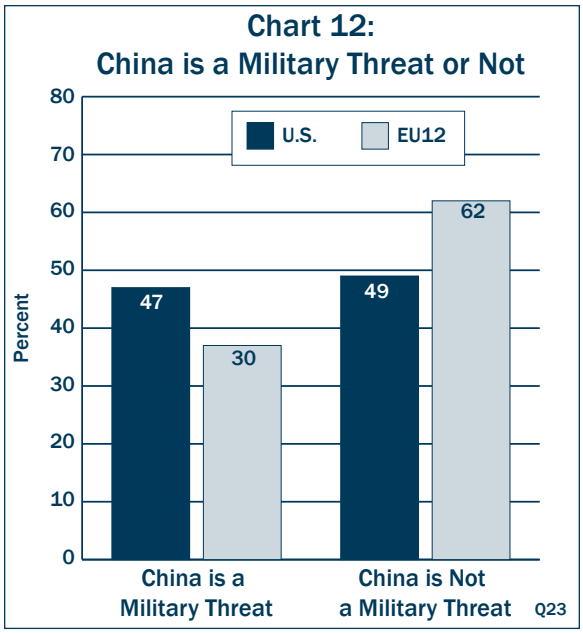
AMERICANS MORE LIKELY THAN EUROPEANS TO SEE CHINA AS ECONOMIC AND MILITARY THREAT

China has paid a lot of attention to Europe over the past years. In late June, Chinese Premier Wen Jiabao completed official visits to Hungary, Britain, and Germany to enhance China's economic relations with those three countries. Chinese delegations also made visits to crisis-stricken Greece, Portugal, and Spain as China looked for stronger economic ties with eurozone countries.

Marking a reverse from last year, the plurality of EU respondents thought of China as more of an economic opportunity (46%) than an economic threat (41%) (see chart 11). Last year, only 39% viewed China as an economic opportunity. This year, majorities in the Netherlands (67%), Sweden (65%), the U.K. (58%), and Germany (57%) as well as around half of the population in Bulgaria (49%) and Romania (51%) considered China an economic opportunity. At the same time, majorities in the United States (63%), France (56%), and Portugal (54%) viewed China as more of an economic threat than an opportunity.

Europeans were also less likely to see China as a military threat than Americans (see chart 12). While only 30% of those polled in the EU and 21% of the Turks viewed China as a security concern, almost half the Americans (47%) saw China in that light, although nearly an equal number (49%) did not consider China a military threat.

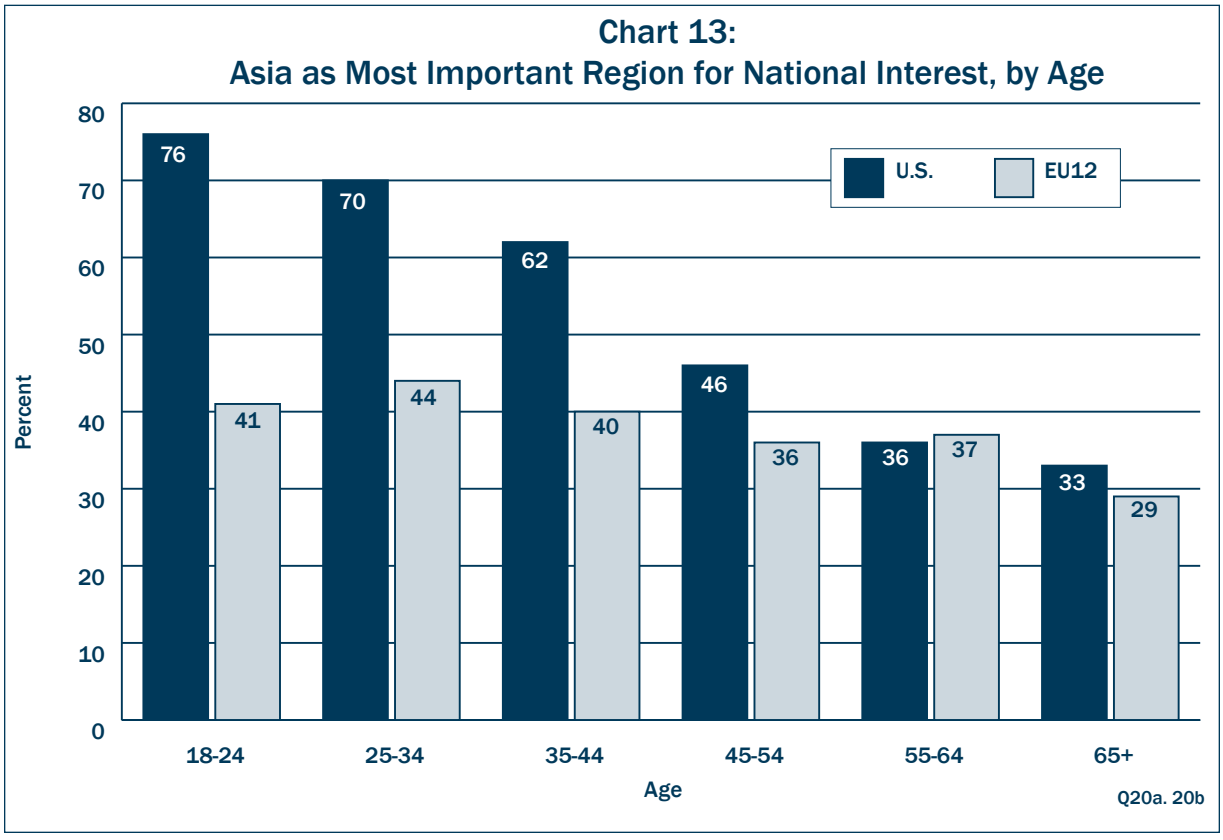




CHINA IS SEEN MORE POSITIVELY BY YOUNGER AMERICANS

A generation gap has emerged among Americans with regard to China. Young people in the United States viewed China more positively than older Americans. Close to three-in-five (59%) Americans between the ages of 18-24 had a favorable opinion of China, but that favorable opinion was only shared by 33% of the 45 to 54 age group, 37% of those between 55 and 64, and 36% of those aged 65 or older.

When asked about the United States' national interests, 76% of the younger Americans (aged 18-24) identified the countries of Asia, such as China, Japan, and South Korea, to be more important than the countries of the European Union (17%). In each progressively older age group, the percentage of those who thought of the EU as more important increased, while those who thought Asia was the most important decreased. Half of Americans aged 55 and older considered countries of the EU more important than those of Asia. While there were some age-related differences

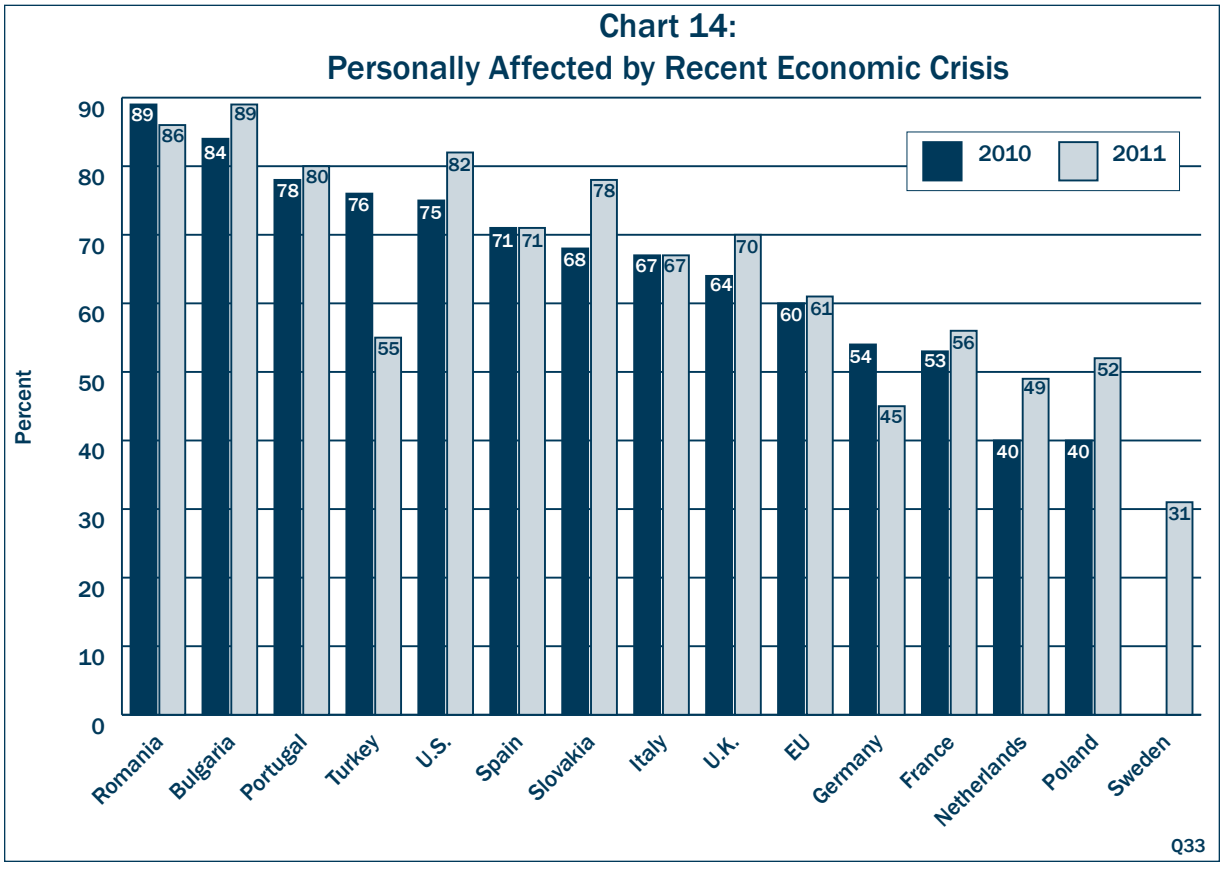


among EU respondents on this question, the pattern was much less dramatic (see chart 13).

Perceptions about the Chinese economy also varied greatly based on age as younger Americans (18-34) were more likely to see China as an economic opportunity (52%) but only 22% of those 65 and older saw China in that positive light. The 55 to 64 age group was the most fearful of China, with more than seven-in-ten (72%) judging China as an economic threat. Even after controlling for a variety of other demographics, age remained an important predictor of sentiments toward China, with younger Americans holding more positive opinions of China and seeing China as more important than the EU for U.S. national interests.

Section Three: The Economy

Over the past 18 months, the European economy faced unprecedented challenges in its effort to limit contagion from the sovereign-debt crisis. Beginning with Greece's troubles in early 2010, fears quickly spread that the debt crisis would bring down other EU countries with high public debt-to-GDP ratios. These concerns were exacerbated when, in November 2010 and April 2011, Ireland and Portugal, respectively, applied for rescue funds from the EU. In February 2011, eurozone finance ministers established the European Stabilization Mechanism, a €500 billion bail-out fund. Countries across Europe enacted austerity measures while larger economies, especially Spain and Italy, remained vulnerable to default due to high public debt and weak economic growth prospects. Meanwhile, the U.S. economy continued to show signs of a very weak recovery since the 2008 recession, unemployment remained uncomfortably high, and many economists worried about a double-dip recession.



MOST PEOPLE STILL PERSONALLY AFFECTED BY CRISIS

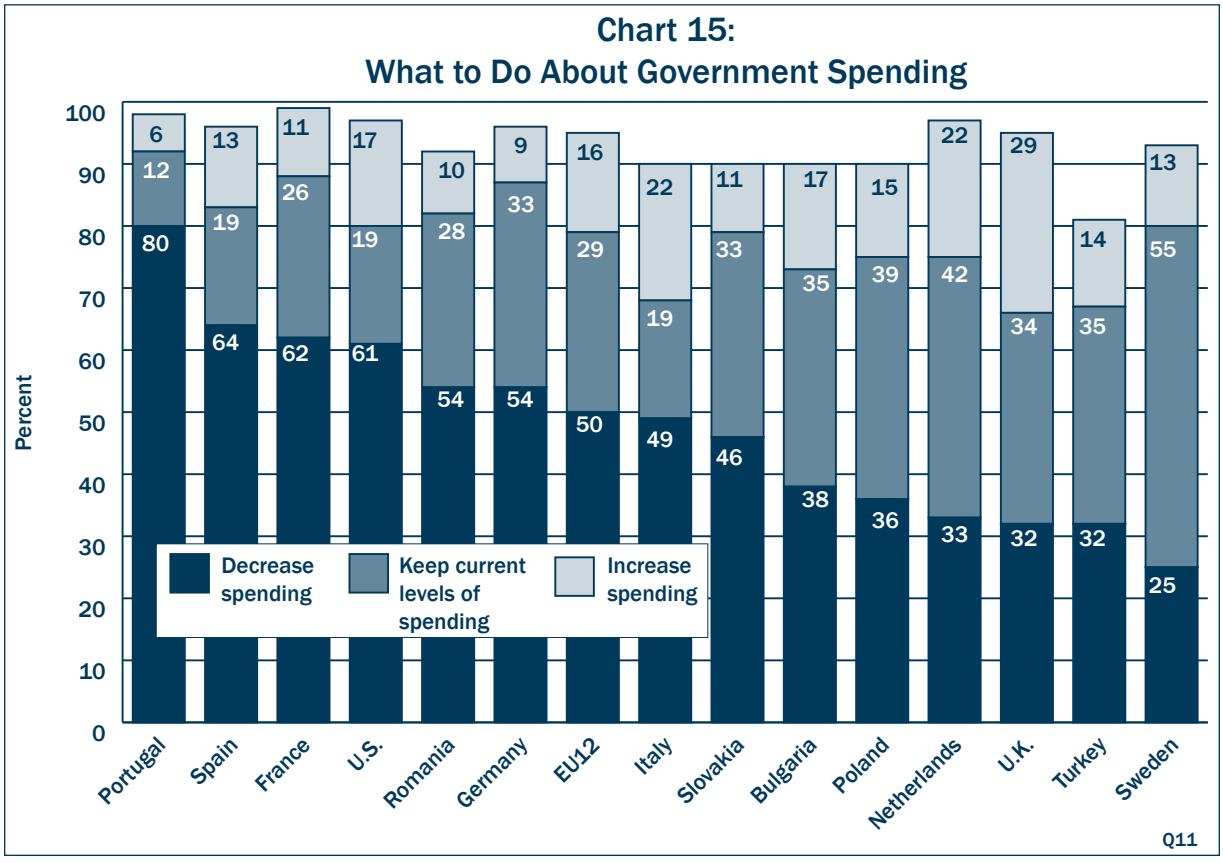
While some economies had started to recover for the third year in a row, the number of respondents who claimed that their family's financial situation had been greatly or somewhat affected by the economic downturn remained high in the EU and the United States[5] (see chart 14).

In the United States, 82% of respondents (up 7 percentage points from 2010) had been personally affected by the economic crisis, while the average in the EU remained stable (61%). However, the EU average masks the fact that respondents in Bulgaria (up 5 points to 89%), Slovakia (up 10 points to 78%), the U.K. (up 6 points to 70%), the Netherlands (up 9 points to 49%), and Poland (up 12 points to 52%) showed increases over the past year. Notably, Turkey (down 21 percentage points to 55%) and Germany (down 9 percentage points to 45%) showed large decreases in respondents feeling personally affected by the crisis. The Swedes (31%) were by far the least likely to be personally affected by the economic crisis.

[5] Those affected are based on adding the percentage of respondents who were "greatly affected" and the percentage of those who were "somewhat affected."

EU OPINION VARIES GREATLY ON GOVERNMENT SPENDING

Many countries in the EU have reacted to the economic crisis by implementing austerity measures. Citizens, on average, appeared to support such efforts. Asked whether they would prefer to decrease, maintain current levels, or increase government spending, half of those in the EU (50%) preferred to decrease spending, although there were notable differences across countries (see chart 15). At the same time, Americans (61%) were also much more likely to want to decrease spending than either of the other options. The Swedes (55%) and the Dutch (42%) were the most likely to want to maintain spending at current levels. The British were the most divided, with approximately one-in-

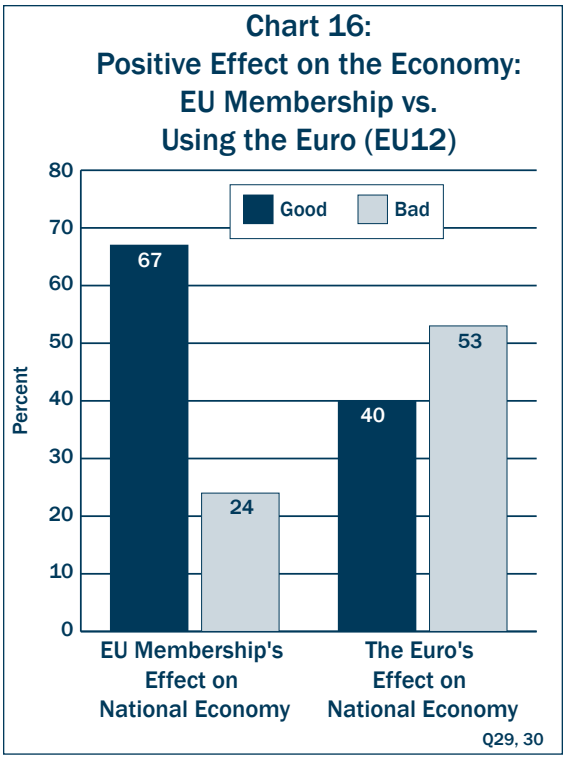


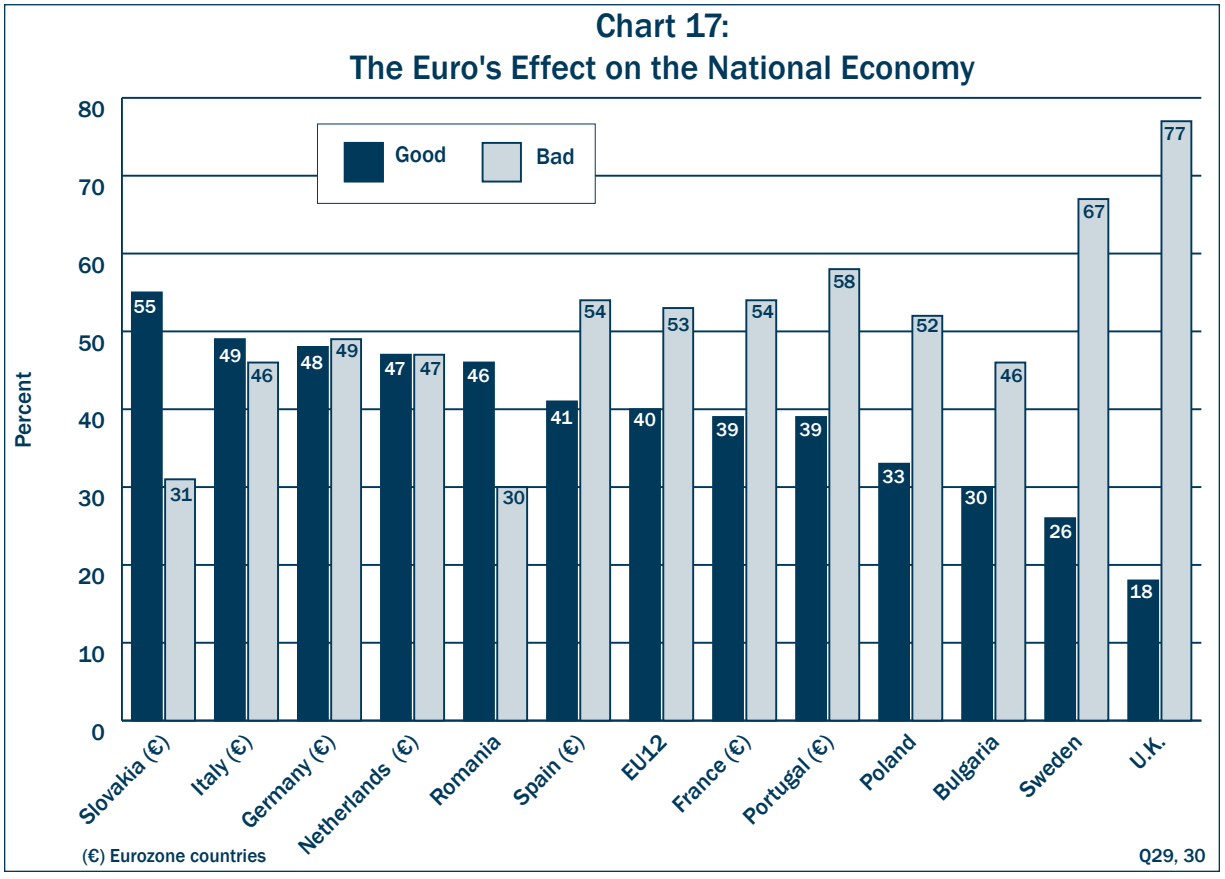
three choosing to the decrease spending (32%), maintain current levels (34%), and increase spending (29%).

EU MEMBERSHIP VIEWED AS GOOD FOR ECONOMY, THE EURO AS BAD

Despite another rough year for most economies inside the EU, the majority of EU respondents (67%) still considered that membership in the European Union had been a good thing for their country's economy (see chart 16).

With the strongest economy in the EU, Germans (76%) were the most likely of all to say that membership in the EU had a positive effect on their economic well-being. This is particularly noteworthy because of Germany's role in helping to bailout other EU economies with debt problems. Germans' belief that the EU had been good for their economy was followed closely by the Poles (74%) and the Dutch (73%). The Bulgarians (46%) and the British (46%) were the least likely to say that EU membership had benefited them





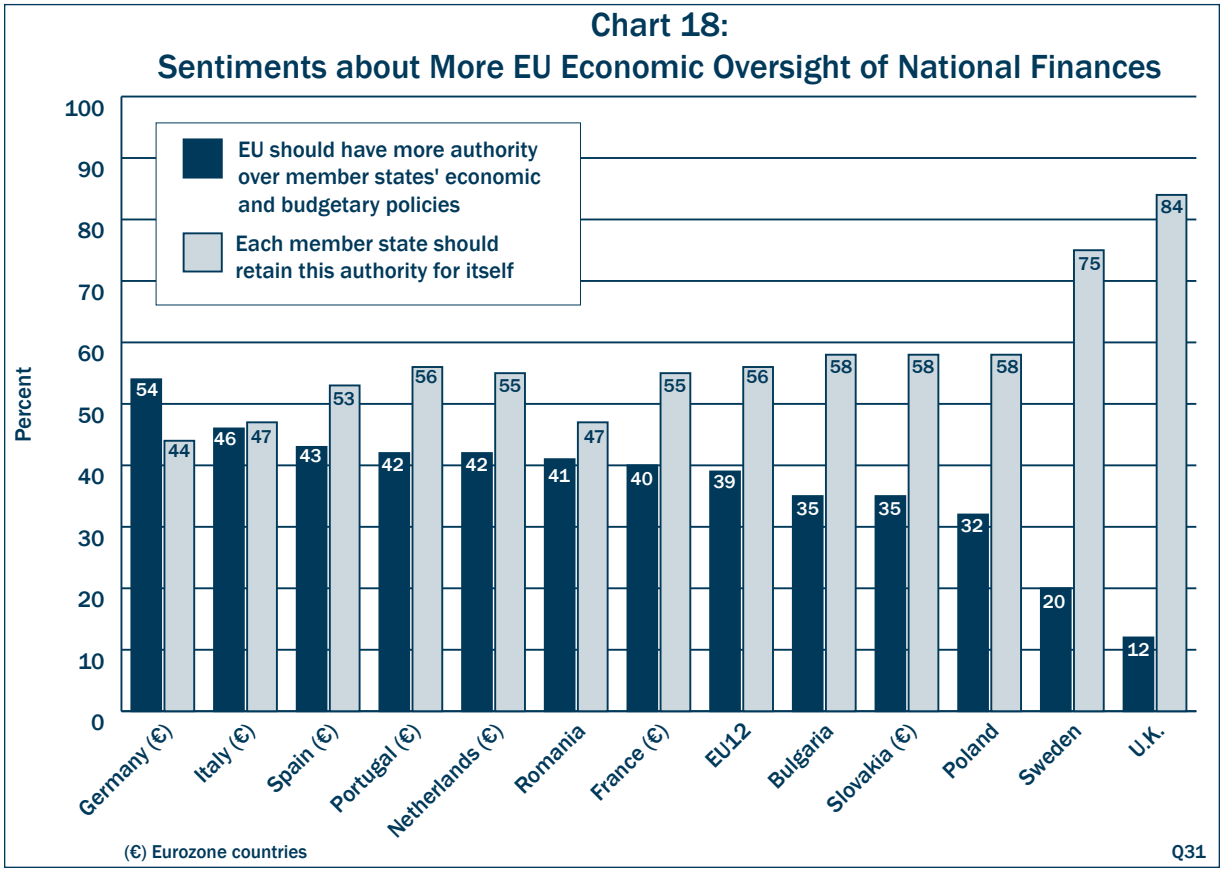
economically. In Turkey, a plurality (48%) said that EU membership would be a good thing for their economy.

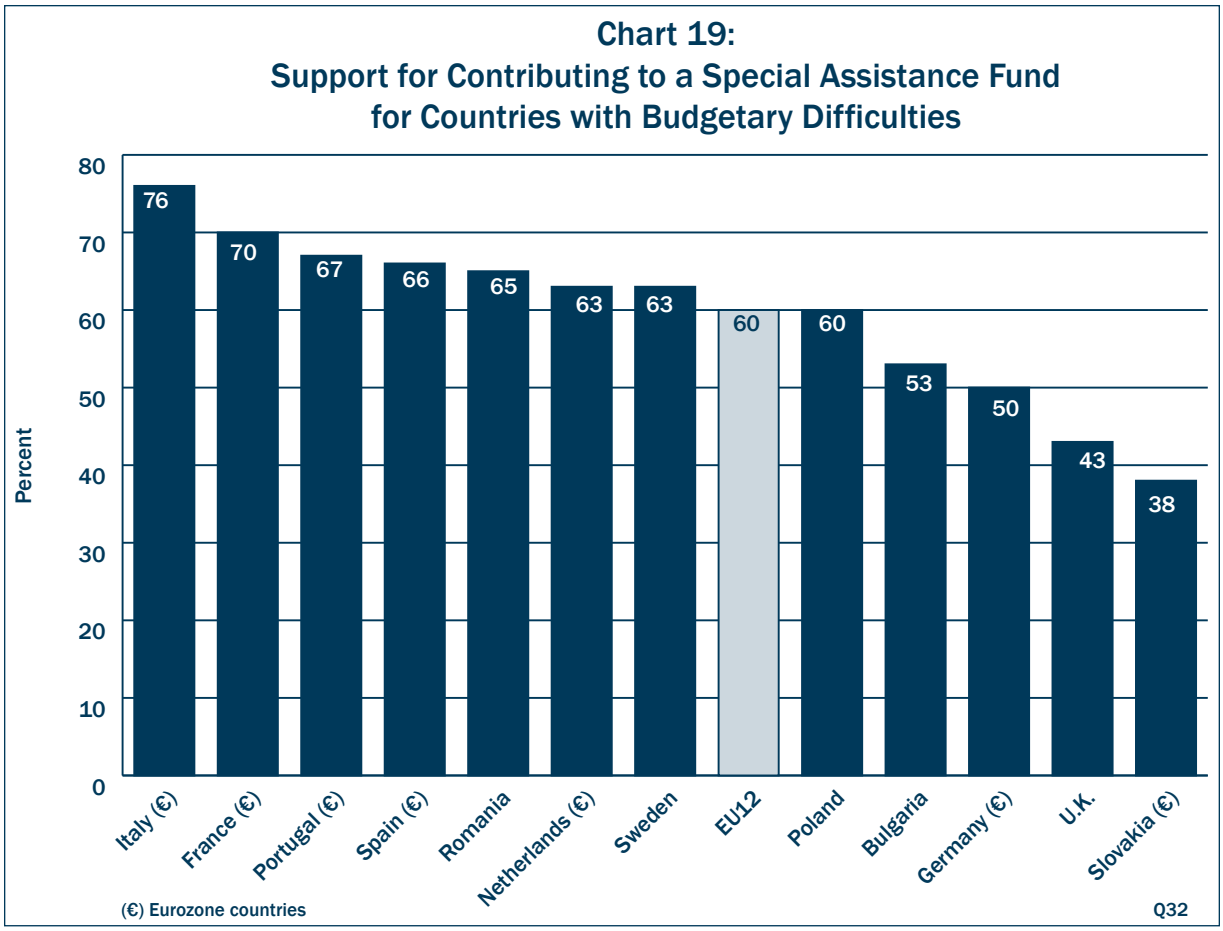
Despite these relatively high ratings of the economic benefits of EU membership, the euro did not enjoy the same support. Only 40% of EU respondents thought that using the euro *had been* (as asked inside the eurozone) or *would be* (as asked outside the eurozone) a good thing for their country's economy and a majority (53%) thought it had been a bad thing (see chart 17).

Slovakia (55%) was the only country using the euro where a majority of respondents said it had been a good thing for the country's economy, and respondents were evenly divided about the benefits of using the euro in Italy (49%), Germany (48%), and the Netherlands (47%). More than half of the French (54%) and Portuguese (58%) said the euro had been a bad thing for their economies (see chart 17). With the exception of Romania, where a plurality of respondents (46%) thought that using the euro would be a good thing, respondents outside the eurozone were the least likely to think so: U.K. (18%), Sweden (26%), Bulgaria (30%), and Poland (33%).

EU CONTROL OVER NATIONAL BUDGETS UNPOPULAR

When it came to the EU having more authority over member states' economic and budgetary policies — a likely prerequisite for future bailouts from Brussels — a majority in every country surveyed, except Germany and Italy, preferred that each member state retain authority for itself (see chart 18). People in the U.K. (84%) and Sweden (75%) were by far the most likely to say that member states should maintain authority over their own economic and budget policies. In Italy, respondents were almost evenly divided, with 47% agreeing that each member state should keep more control. Germany was the only country in which a clear majority of respondents preferred that the EU have more control over member states' budgets and policies.





CONTRIBUTING TO STABILITY FUND SEEN POSITIVELY

When asked whether they approve of their country making contributions to a fund to assist member states that find themselves in budgetary difficulty, 60% of EU respondents thought it acceptable that their countries contribute to this fund while only 36% disapproved. The majority of respondents approved of this in all countries except for the U.K. (43%) and Slovakia (38%). In Germany, likely to be the largest contributor to any such fund, respondents were more divided, with 50% approving of such a contribution and 47% disapproving (see chart 19).

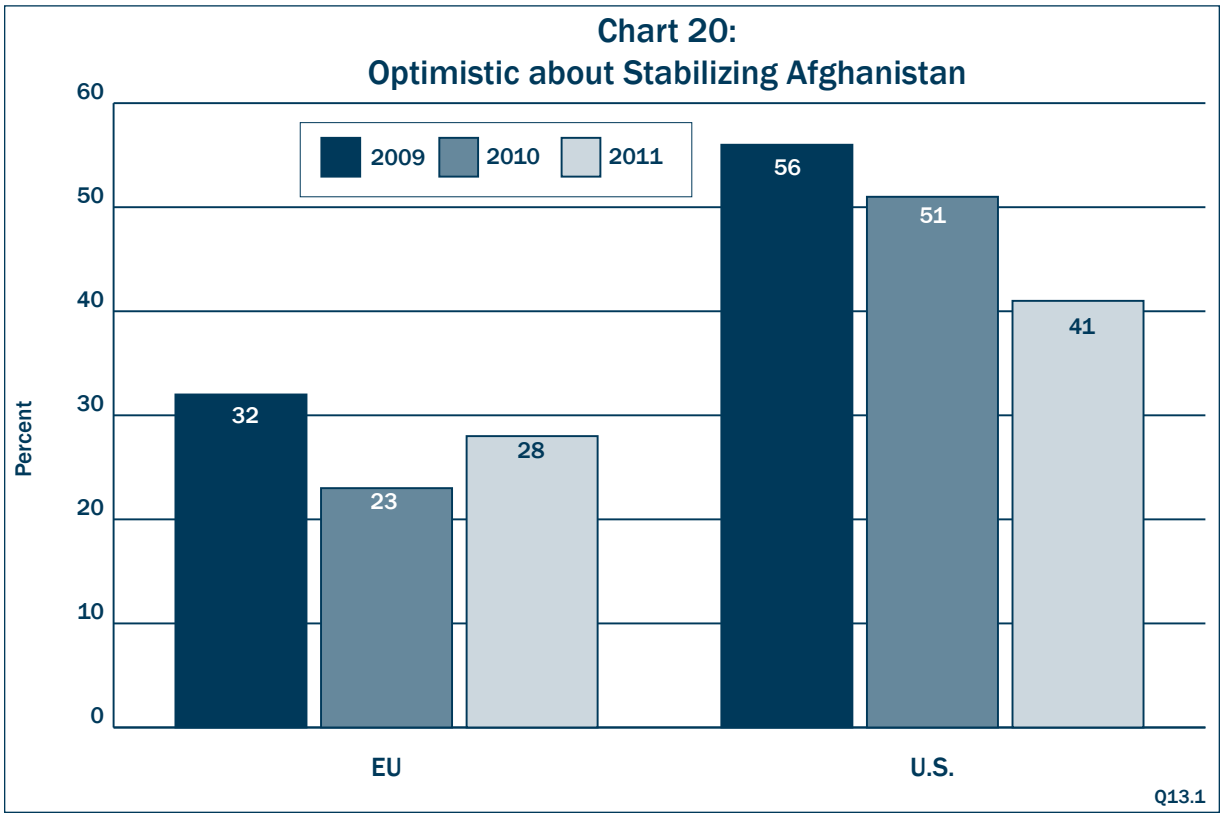
Section Four: Transatlantic Security

Aside from the killing of Osama Bin Laden on May 2, events dominating the transatlantic security agenda in 2011 had been fairly gloomy. Amid growing charges of corruption and decreasing confidence in Afghan President Hamid Karzai, the lack of progress in Afghanistan and the rising cost of the war dominated the headlines in the United States. Meanwhile, the last speech U.S. Defense Secretary Robert Gates gave in Brussels bluntly criticized NATO and its members for shortages in military spending and political will, warning of "a dim if not dismal future" for an alliance at risk of becoming irrelevant.

While a transatlantic opinion gap still exists on certain security topics, the survey also revealed notable shifts in public opinion on some key security policies. These shifts resulted in a convergence of EU-U.S. opinion on the best way forward on several issues — in particular concerning Afghanistan. However, despite some shifting attitudes, support for other security activities and institutions remained relatively stable over the past year.

WANING U.S. OPTIMISM IN AFGHANISTAN

For the first time, a majority of Americans (56%) were pessimistic about the prospects of stabilizing the situation



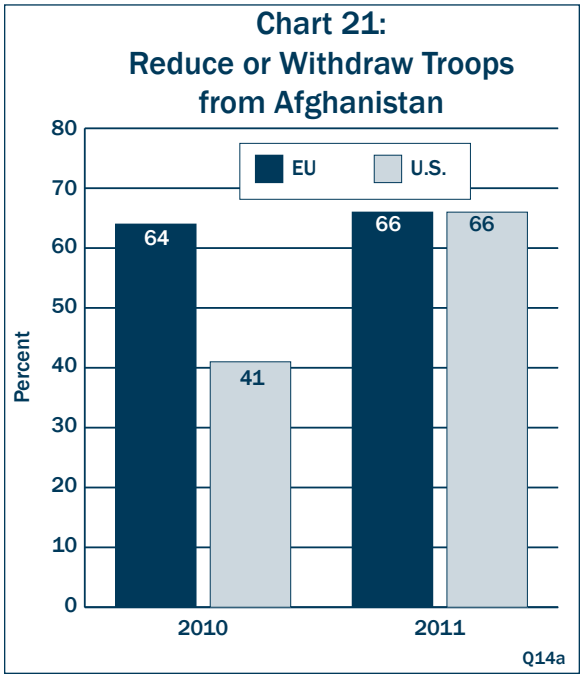
in Afghanistan. Only 41% were optimistic — marking an important reversal from 2009 when 56% were optimistic and only 39% were pessimistic (see chart 20).

A majority of the EU public has been unenthusiastic about the situation in Afghanistan since the survey first asked this question in 2009. This year, the EU public was slightly more optimistic (28%) than in 2010 (23%), but was still less optimistic than in 2009 (32%).

CONVERGING U.S. AND EU VIEWS ON TROOPS IN AFGHANISTAN

As optimism and willingness to commit more troops to Afghanistan continued to wane in the United States and Europe, the transatlantic divide on how to deal with Afghanistan appears to be shrinking. For the first time, the majority of U.S. and EU respondents (66% each) agree that troop levels should be reduced or troops should be withdrawn altogether (see chart 21).

The number of Americans who backed increasing troop levels in Afghanistan shrank from 25% in 2010 to only 6% this year and those who wanted to keep troop levels the same decreased from 33% in 2010 to 25% this year. Meanwhile, the number of Americans who wanted to reduce the number of troops in Afghanistan grew nine percentage points to 31% and those who wanted to withdraw all troops grew 16 points to 35%.



European attitudes about troop presence in Afghanistan did not change much over the past year. The plurality of respondents (44%) thought that their government should withdraw all troops, 22% thought troop levels should be reduced, 29% thought troop levels should remain the same, and very few (3%) thought their government should commit more troops.

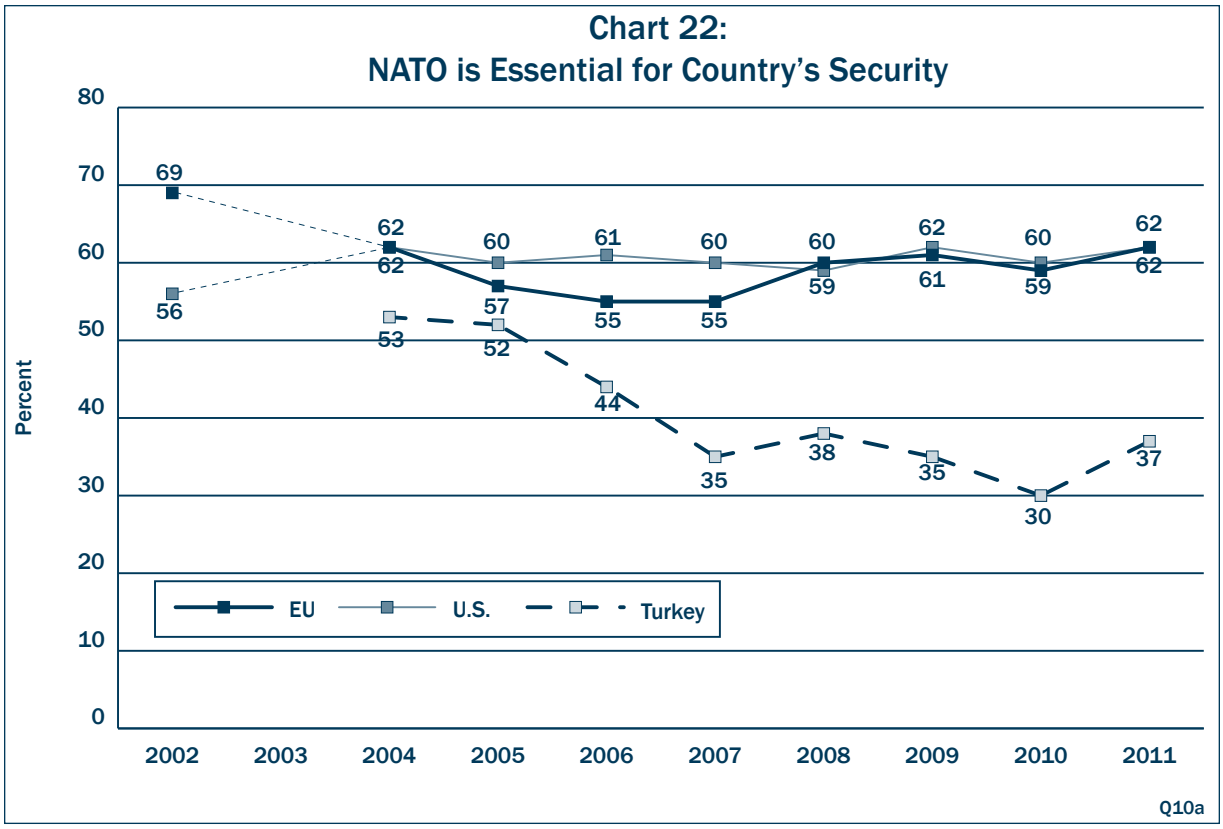
Individual countries in Europe mostly reflected these EU averages, with a solid majority in each country preferring to reduce or withdraw troops. Germany (51%), with the third largest contingent in Afghanistan, and Poland (56%), with the seventh largest number of troops in Afghanistan, were the only two countries where a majority, rather than just a plurality, preferred to withdraw all troops. The fact that pluralities in France (44%), the U.K. (43%), and Italy (39%) would prefer to withdraw all troops means that this opinion is shared by a plurality or majority in six of the seven countries contributing the most troops to Afghanistan.

On the other end of the spectrum was Sweden, where 48% preferred to maintain troop levels and 6% wanted to increase them.

VIEWS ON NATO REMARKABLY STABLE

Despite growing pessimism about NATO troop presence in Afghanistan and Secretary Gates' gloomy picture of the future of NATO in his speech in Brussels, the institution was still seen as essential by solid majorities in all countries surveyed except for Turkey. The fact that the survey also came on the heels of a highly publicized and controversial intervention in Libya only makes it more noteworthy that the transatlantic institution is still seen as essential by 62% of EU and 62% U.S. respondents (see chart 22).

Among the EU NATO members, those who said NATO was essential for their country's security ranged from a high of 73% in the Netherlands to a low of 51% in Poland. As in past years, Turkey was the NATO member with the lowest



support for NATO, with only 37% saying that NATO is essential.

SWEDES DIVIDED ON WHETHER NATO IS IMPORTANT FOR SECURITY

Sweden has long been known for the country's policy of military nonalignment. As the only non-NATO member in the survey, people in Sweden were asked if cooperating closely with NATO is important for their country's security. Despite the nation's history of being a "virtual" ally, there was no broad consensus on the issue. The Swedes were evenly split, with 47% saying it was important and 48% saying it was not important to cooperate closely with NATO.

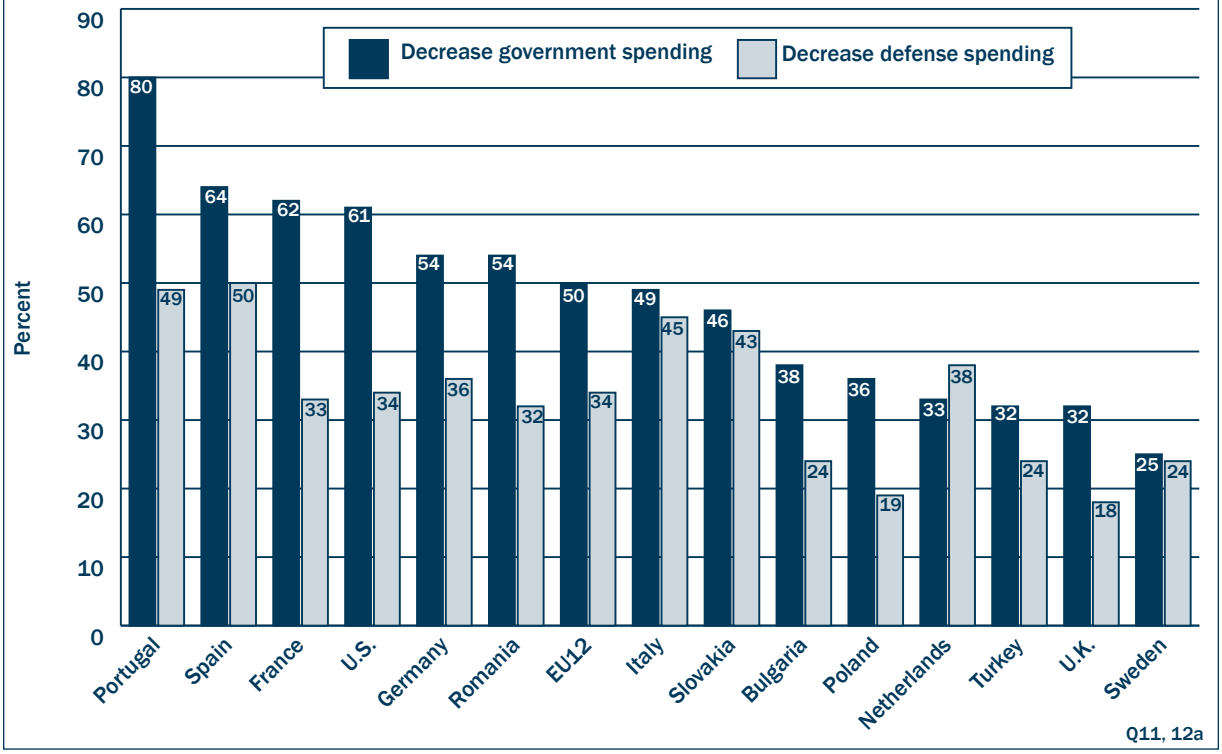
PUBLIC LESS LIKELY TO CUT DEFENSE SPENDING THAN SPENDING IN GENERAL

When asked whether their government should increase spending, maintain current levels, or reduce spending, most respondents chose either to maintain or reduce spending in general. In fact, in 9 of the 14 countries surveyed, a plurality of respondents wanted to reduce government spending. However, when asked about *defense* spending in particular, in 10 of the 14 countries, a plurality wanted to maintain current levels of military outlays (see chart 23).

On average, 50% of those in the EU countries surveyed wanted to decrease government spending, 29% wanted to keep current levels, and 16% wanted to increase spending. But when asked about defense spending, 34% wanted to decrease spending, 46% wanted to keep current levels, and 17% wanted to increase (see chart 24).

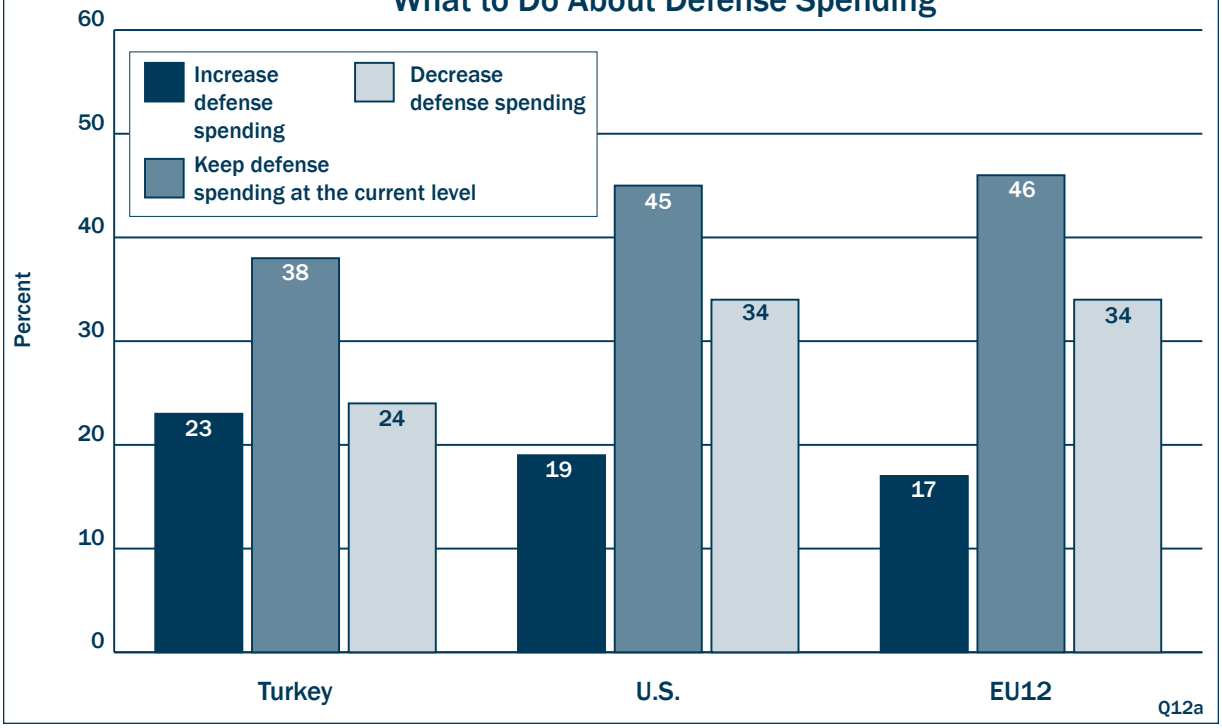
A fairly similar pattern was true in the United States. Sixty-one percent of Americans wanted to decrease government spending, 19% wanted to maintain current levels, and 17% wanted to increase spending. But when it came to defense spending, only 34% wanted to decrease, 45% wanted to maintain levels, and 19% wanted to increase defense spending.

Chart 23:
Decrease Government Spending vs. Decrease Defense Spending



Q11, 12a

Chart 24:
What to Do About Defense Spending



Q12a

IRAN'S NUCLEAR PROGRAM SLIGHTLY LESS URGENT CONCERN

The public's concern about Iran has remained relatively stable in the EU over the past year (see chart 25). In the United States, those concerned about Iran acquiring nuclear weapons dropped to 76%, down ten percentage points from last year, and Americans who were *very* concerned about Iran fell even more, from 69% in 2010 to 56% in 2011.

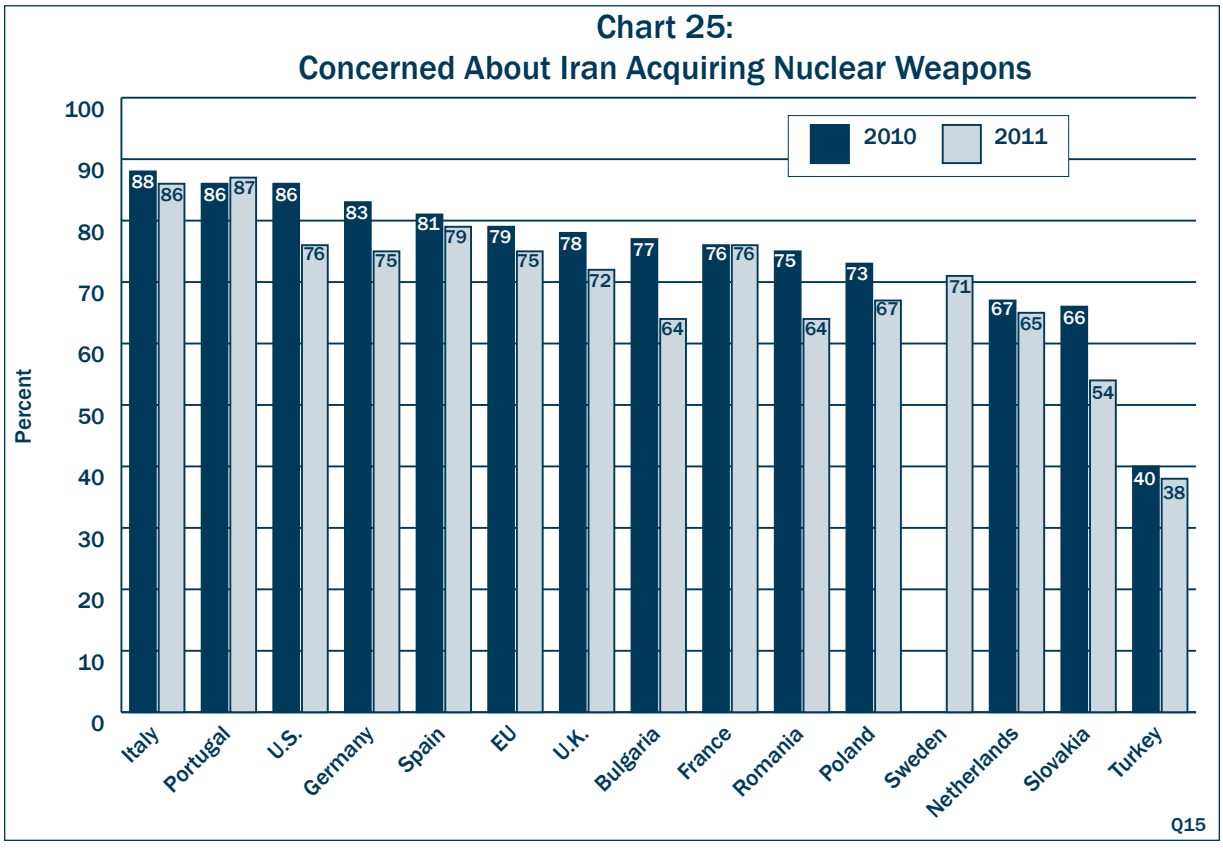
On average, European concern about Iran largely remained the same, dropping from 79% in 2010 to 75% in 2011. The EU countries that showed the most notable decreases in concern were Bulgaria, (down 13 points to 64%), Slovakia (down 12 points to 54%), and Romania (down 11 points to 64%).

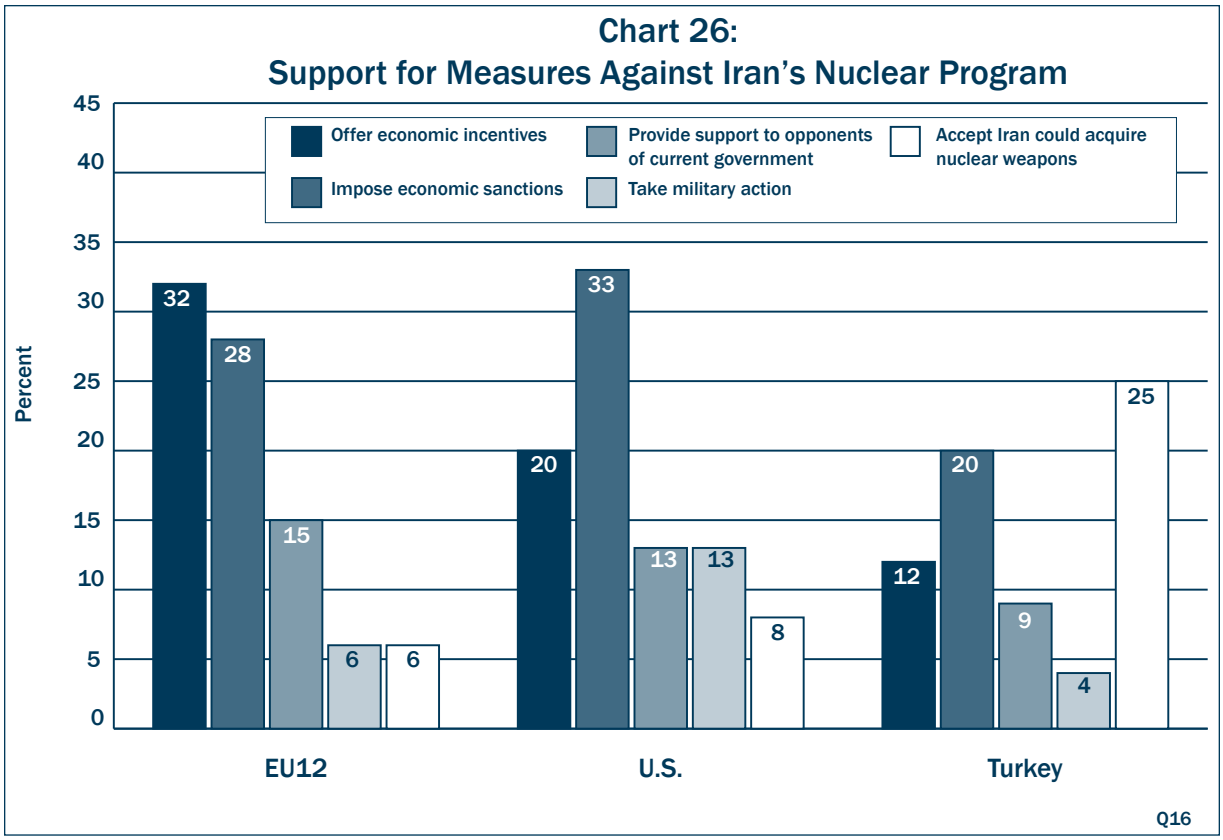
As in past years, Turkey was the least worried about Iran acquiring a nuclear weapon. Only 38% of Turks were troubled by their neighbor becoming a nuclear power, while 51% were only a little concerned or not concerned at all.

EU AND UNITED STATES PREFER ECONOMIC TACTICS TO PRESSURE IRAN

Despite the same level of concern in the United States and the EU, there were differing opinions about how best to prevent Iran from acquiring nuclear weapons (see chart 26). A plurality of those in the EU (32%) preferred offering economic incentives, while a plurality of Americans (33%) preferred imposing economic sanctions, although the majority of EU and U.S. respondents chose one of these two options and were often fairly divided over which one was preferable. The percentage of Americans who preferred supporting the Iranian opposition dropped from 25% in 2010 to 13% in 2011 — matching EU levels of support (15%) for the same option.

There was also little support in the EU countries polled (6%) or the United States (8%) for simply accepting that Iran could acquire nuclear weapons while other options were on the table. A quarter of Turks, a plurality, said that accepting a nuclear Iran (25%) was the best option. Very





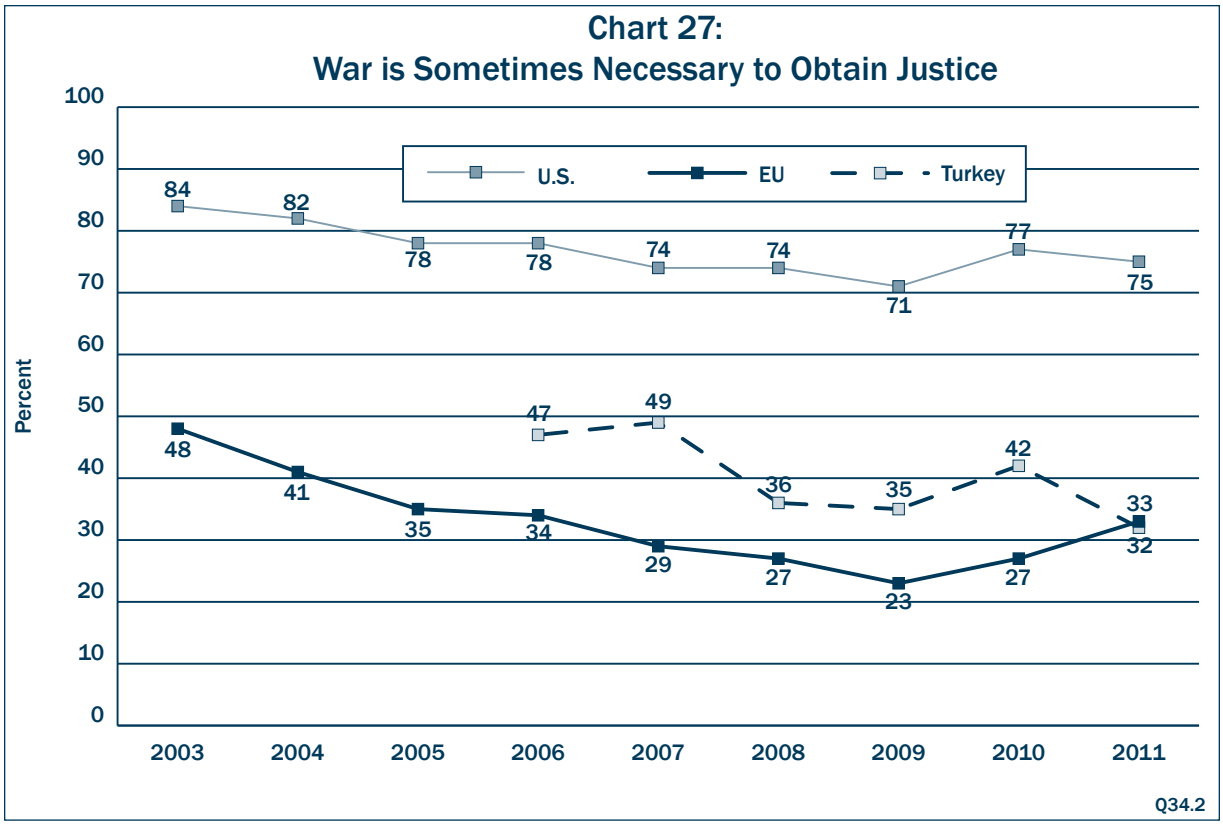
few people in the EU (6%), the United States (13%), and Turkey (4%) preferred military action over other options.

However, while very few American and EU respondents favored military action as their choice among many policy options, changing the context of the situation led to much different results. The respondents who chose a nonmilitary option for dealing with Iran were then asked to imagine that all nonmilitary options had been exhausted. They were then given the choice between accepting a nuclear Iran and taking military action. In this scenario, a plurality of Europeans (47%) and a majority of Americans (54%) favored the use of force. Turkey (50%), Germany (50%), the U.K. (46%), and Poland (41%) were the only countries where a majority or plurality of respondents would accept a nuclear Iran over military action under these circumstances.

THE USE OF FORCE: TRANSATLANTIC DIVIDE IN THEORY, CONVERGENCE IN POLICY

For a long time, the United States and Europe have not seen eye to eye on the use of force. Repeated surveys have shown that this difference in values is deeply held and unlikely to change despite day-to-day events and changing security environments. In 2011, there was a 42 percentage point difference between those in the EU (33%) who felt war is sometimes necessary to obtain justice and those in the United States (75%) who felt so (see chart 27). The U.K., with 64% agreeing that war is sometimes necessary, was the only European country that looked more like the United States than like the rest of the EU.

However, despite these differences when it comes to justifying war, there are a number of security policies on which U.S. and European opinions seem to be converging. As seen above, this is the first year where the same number of EU (66%) and U.S. (66%) respondents want to reduce or withdraw troops from Afghanistan. When presented with the option of allowing Iran to acquire nuclear weapons or taking military action, those in the EU (47%) and the United States (54%) who preferred military action were only seven percentage points apart. Even on approval for the international intervention in Libya, which will be discussed in the



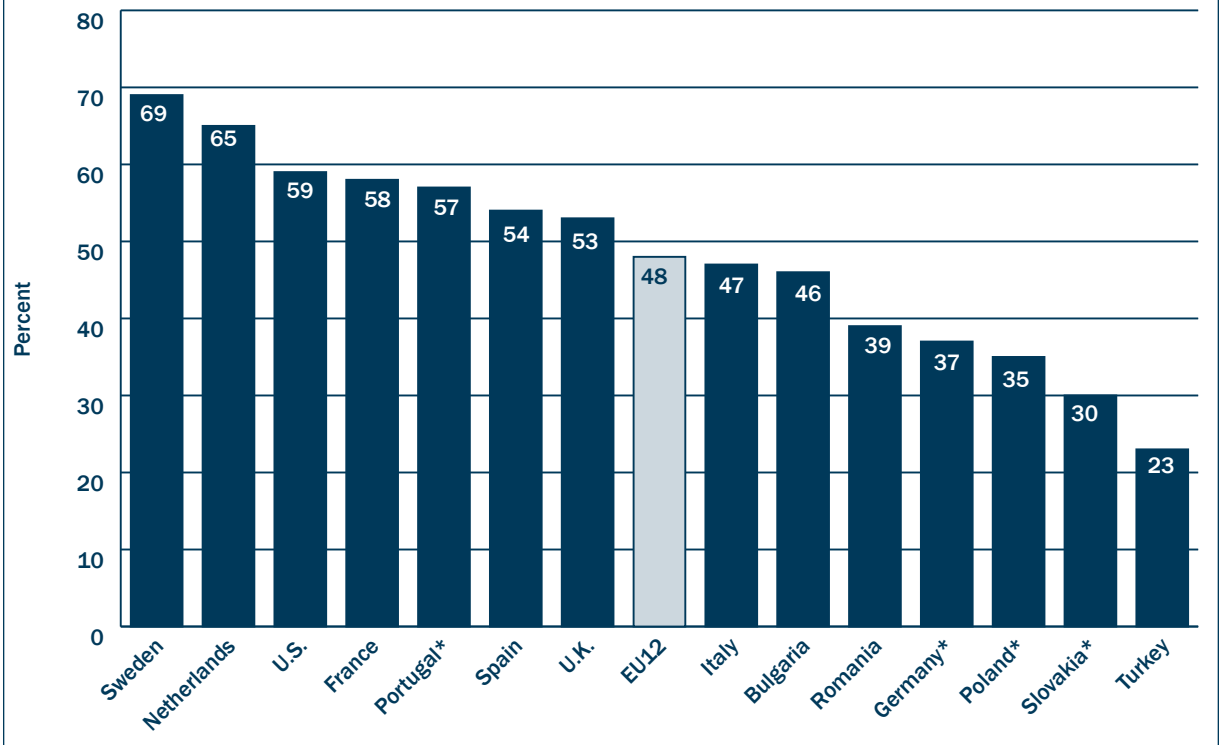
following chapter, U.S. and European publics held remarkably similar views in many cases. These findings seem to suggest that although Americans and Europeans report vastly different opinions about whether war can be used to obtain justice in the abstract, when presented with actual security issues they might share a common perspective.

Section Five: Libya and the Transatlantic Role in the Middle East and North Africa

Unforeseen by most of the world, a chain of events starting in the winter of 2010 led to a series of protests and uprisings that considerably altered the political landscape across the Middle East and North Africa. By the time this survey was in the field in May, the Arab Spring had already resulted in drastic governmental changes. The autocratic leaders in Tunisia and Egypt were disposed in relatively peaceful coups. In Algeria, Jordan, and Morocco, protests led to the promise of meaningful democratic reforms. Protests in Bahrain, Syria, Libya, and Yemen were met with violent attempts to suppress the uprisings. In Libya, these violent attacks on civilian populations resulted in an UN Security Council resolution that endorsed the use of force to protect civilians. An international coalition subsequently intervened, and since the survey data was taken, the government of Colonel Muammar Gaddafi has been effectively overthrown.

As the United States and the EU respond to rapidly changing conditions in the region, the survey found differing public views about the prospects for success of this inter-

Chart 28:
Approval for Libyan Intervention by International Forces



*Aside from their membership in NATO, these countries are not involved in military operations in Libya.

Q39

vention, the appropriate level of U.S. and EU involvement, and the best policy options for the transatlantic partners.

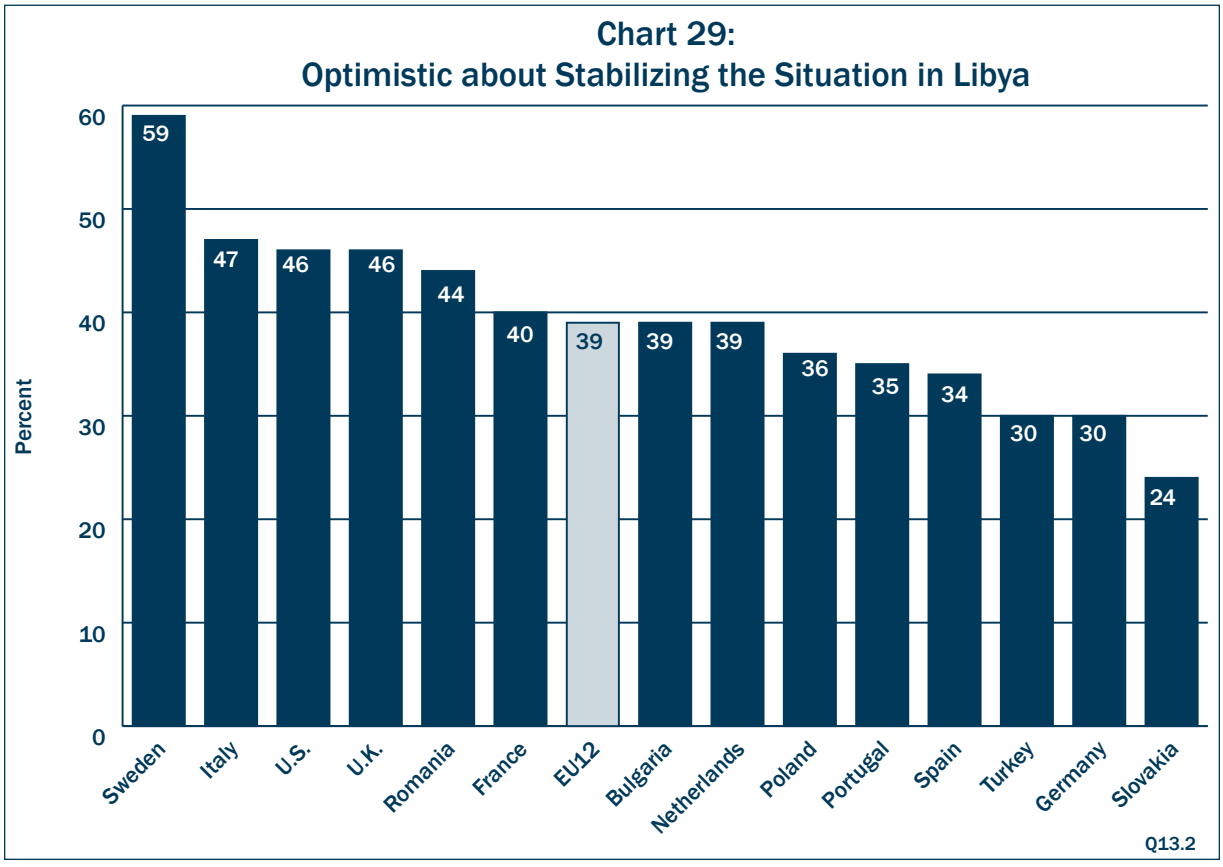
EU APPROVAL DIVIDED ON LIBYA

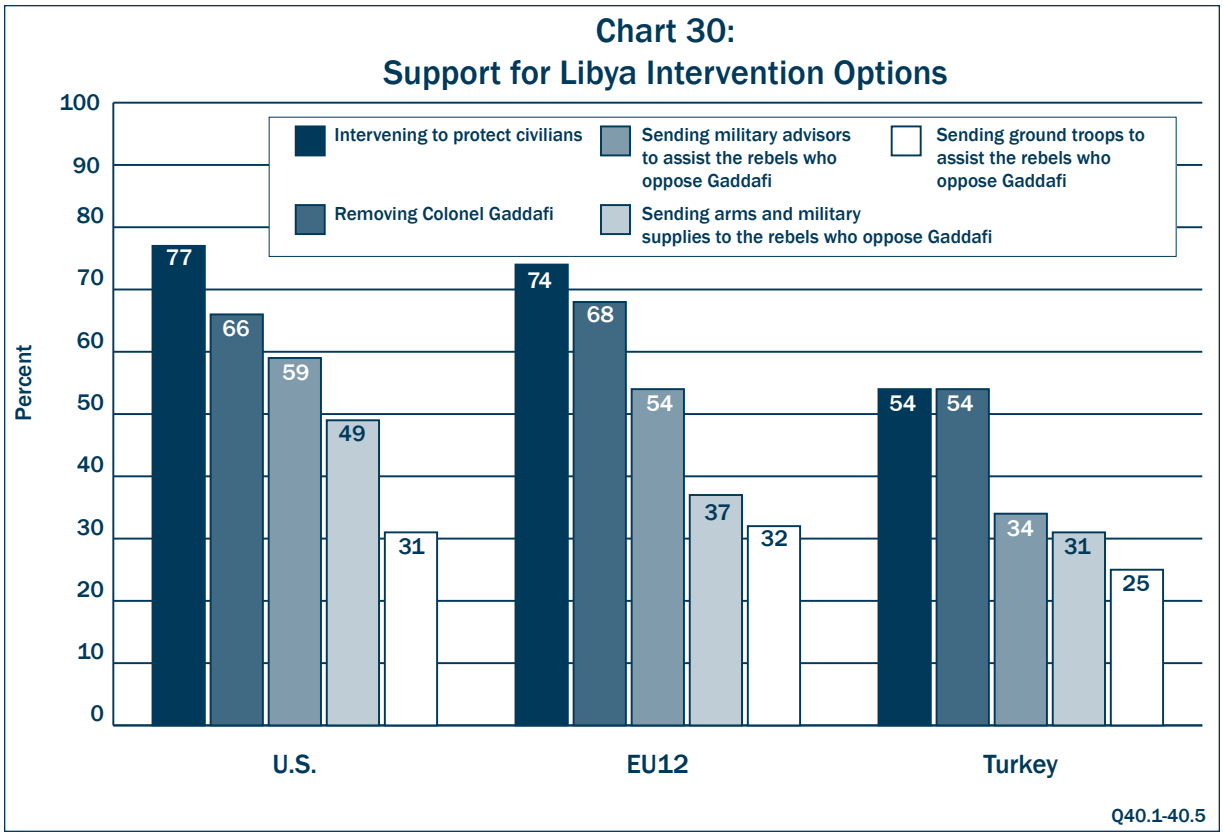
On March 19, NATO began airstrikes in Libya with the intention of preventing Gaddafi's military from killing large numbers of civilians in an attempt to suppress the rebellion. The survey, conducted two months after the incursion, showed a solid majority (59%) of Americans approved of the military action in Libya by international forces — and this support was equally shared among Republicans, Democrats, and Independents.

While EU respondents were, on average, evenly divided about the intervention, with 48% approving and 47% disapproving, there were great differences in public opinion among countries (see chart 28). The United States (59%), France (58%), and the U.K. (53%), all of which spearheaded the military intervention from the beginning, showed majority levels of public support for the effort. Sweden (69%) and the Netherlands (65%), countries that began to contribute militarily after NATO took control of the operation, were the most likely to approve of international forces intervening in Libya. Turkey, despite participating militarily in Libya, had the lowest level of approval for the international intervention, with only 23% approving and 64% disapproving. Of all the nations surveyed, only Germany, Poland, Slovakia, and Portugal did not directly contribute militarily to the Libyan intervention apart from their general membership in NATO. And, with the exception of Portugal (57%), support in these nations was low: Germany (37%), Poland (35%), and Slovakia (30%).

LOW LEVELS OF OPTIMISM ABOUT LIBYA

Despite relatively high U.S. approval of the international intervention in Libya, U.S. respondents were divided, with 46% reporting they were optimistic about stabilizing the situation in Libya and 48% saying they were pessimistic. EU respondents (39%) were even less optimistic (see chart 29). In fact, Sweden (59%) was the only country surveyed where





a clear majority of the public was optimistic about stabilizing Libya.

EU AND UNITED STATES AGREE ON BEST POLICY OPTIONS IN LIBYA

While EU and U.S. respondents showed different levels of support for the international military intervention in Libya, respondents on both sides of the Atlantic held relatively similar views about how best to support the Libyan revolution (see chart 30). Roughly three-in-four respondents in the United States (77%) and the EU (74%) backed intervening to protect civilians. While there was some variance among countries on this question, solid majorities in every nation supported intervening to protect civilians. Majorities in the United States (66%), EU (68%), and Turkey (54%) also supported the removal of Colonel Gaddafi. Finally, majorities of Americans (59%) and of those living in the EU (54%) also supported sending military advisors to assist the rebels who oppose Gaddafi.

However, when respondents were asked about sending their own country's ground troops to assist the rebels, support dropped to 31% in the United States and 32% in the EU. The only countries where a majority supported this option were the Netherlands (57%) and France (56%). Slovakia (14%), Bulgaria (15%), Romania (16%), Germany (18%), and Poland (21%) were the least supportive of this option.

Both EU and U.S. respondents were much more likely to approve the intervention in Libya by international forces than they were to support sending their own countries' troops to assist the rebels. While 59% of U.S. respondents approved of the intervention by international forces, only 31% supported sending U.S. ground troops to Libya. At the same time, 48% of EU respondents approved of the international intervention, but only 32% supported sending troops from their own countries to assist the rebels who oppose Gaddafi.

TRANSATLANTIC DIVIDE ON DEMOCRACY PROMOTION

As the Arab Spring raises the prospect of greater democracy in the Middle East and North Africa, the 2011 survey attempted to gauge U.S. and European enthusiasm for supporting that transition. In 2005, when *Transatlantic Trends* first asked a question about democracy promotion, in an attempt to capture whether respondents' views were being affected by the war in Iraq, three-in-four (74%) of those in the nine EU countries surveyed felt it should be the role of the EU to help establish democracy in other countries. At the same time, a slight majority (52%) of U.S. respondents supported such a role for the United States. EU opinion on this question has changed very little over the years. In 2011, 69% of EU respondents reported that the EU should promote democracy abroad. However, U.S. support for democracy promotion began to drop in 2006 (45%), slid even further in 2007 (37%), and remained low in 2011 (37%) (see chart 31).

AMERICANS AND TURKS ARE LEAST LIKELY TO SEE PROMOTING DEMOCRACY IN THE MIDDLE EAST AND NORTH AFRICA TO BE THEIR ROLE

After providing their opinions about democracy promotion in general, respondents were later asked whether it should be the role of the EU or the United States to promote democracy in situations like those in the Middle East and North Africa. Notably, mentioning the events of the Arab Spring did not elicit much of a change in opinion. Respondents in most countries were only a little more likely or about equally likely to favor democracy promotion in general over efforts to do so specifically in the Middle East and North Africa (see chart 32).

A solid majority of EU respondents (64%) said it should be the role of the European Union to support democracy in cases such as the Middle East and North Africa. Fewer than one-in-three (29%) said the EU should stay out completely. In the United States, 43% supported democracy promo-

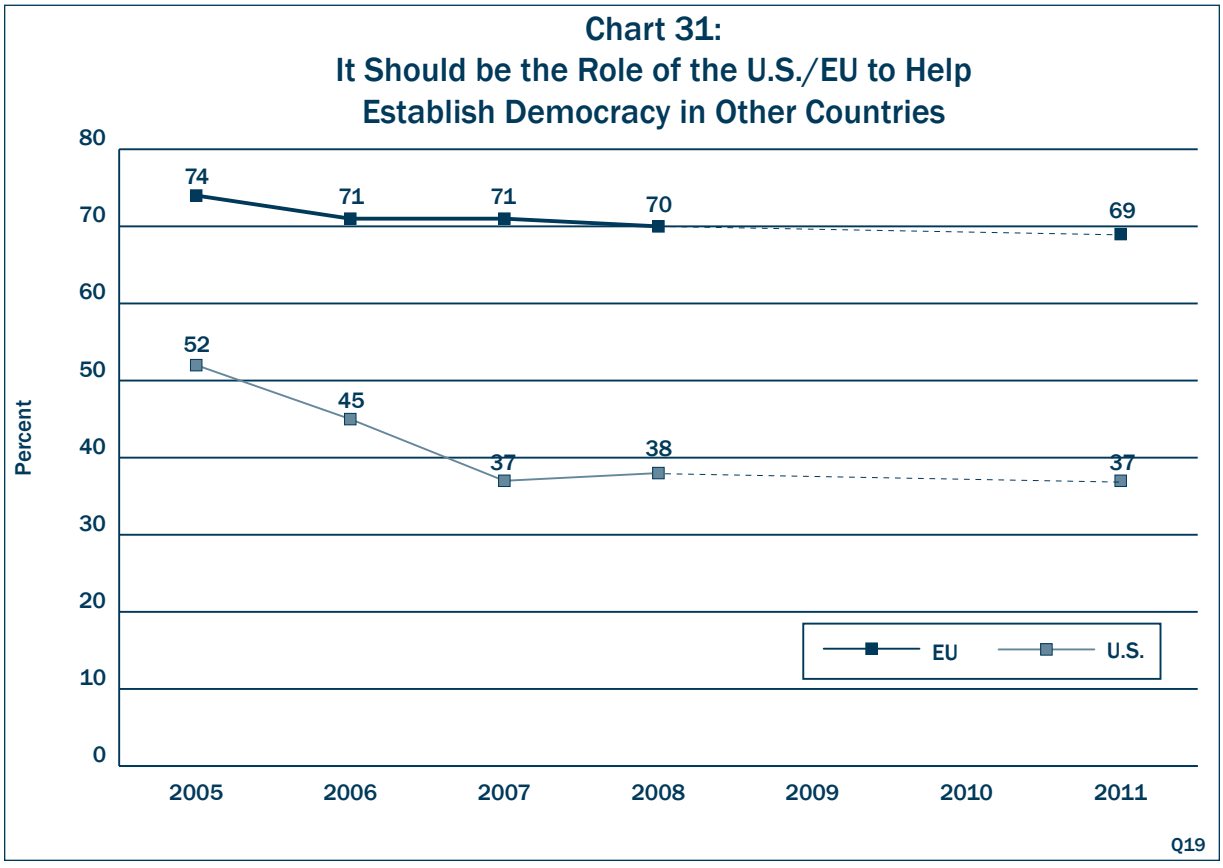
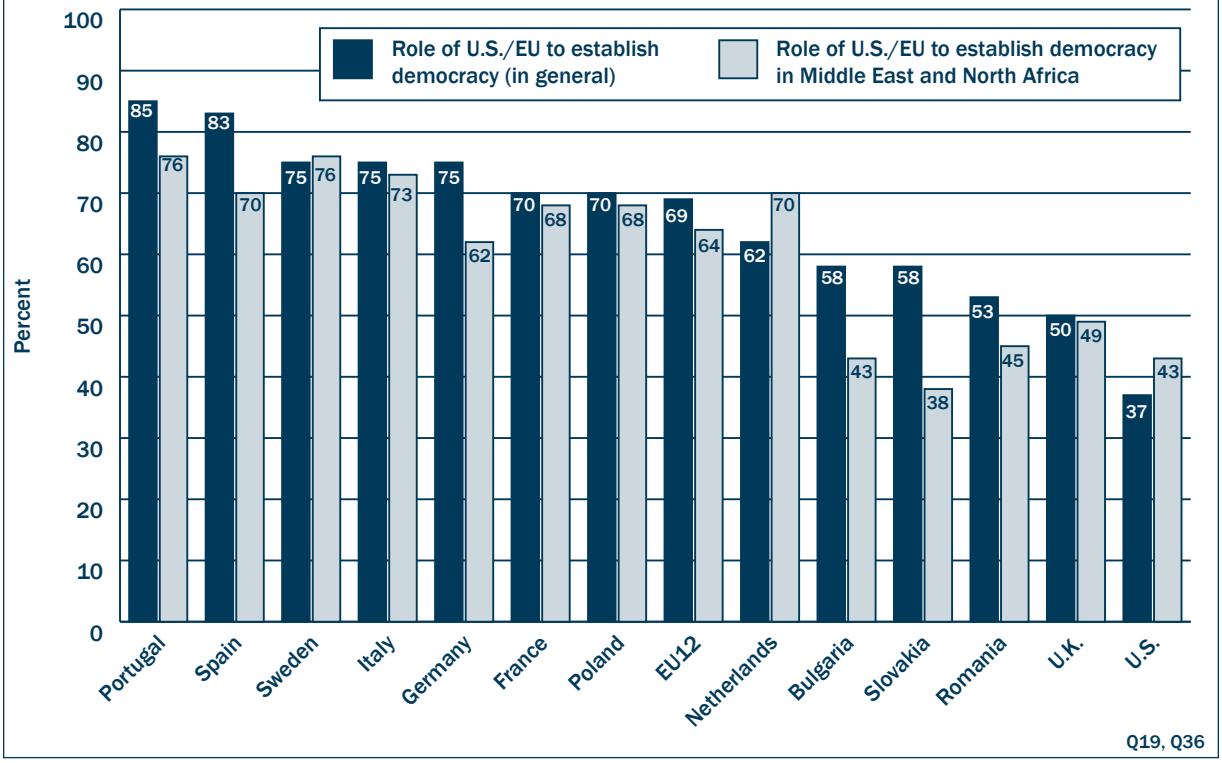


Chart 32:
U.S./EU Role to Help Establish Democracy: Generally vs. in the Middle East and North Africa



Q19, Q36

tion in the region and half (50%) said that the United States should stay out completely.

A plurality (44%) of Turks said it should be Turkey's role to promote democracy in the Middle East and North Africa, while 35% said Turkey should not engage in such activities.

SOME COUNTRIES VIEWED AS NOT YET READY TO BECOME DEMOCRACIES

Respondents who said the EU/United States/Turkey should not help support democracy in the Middle East and North Africa were then asked follow-up questions regarding why they thought that their countries should not get involved. As can be seen in chart 33, those who wanted to stay out completely were most likely to agree that certain countries are not yet ready to become democracies.

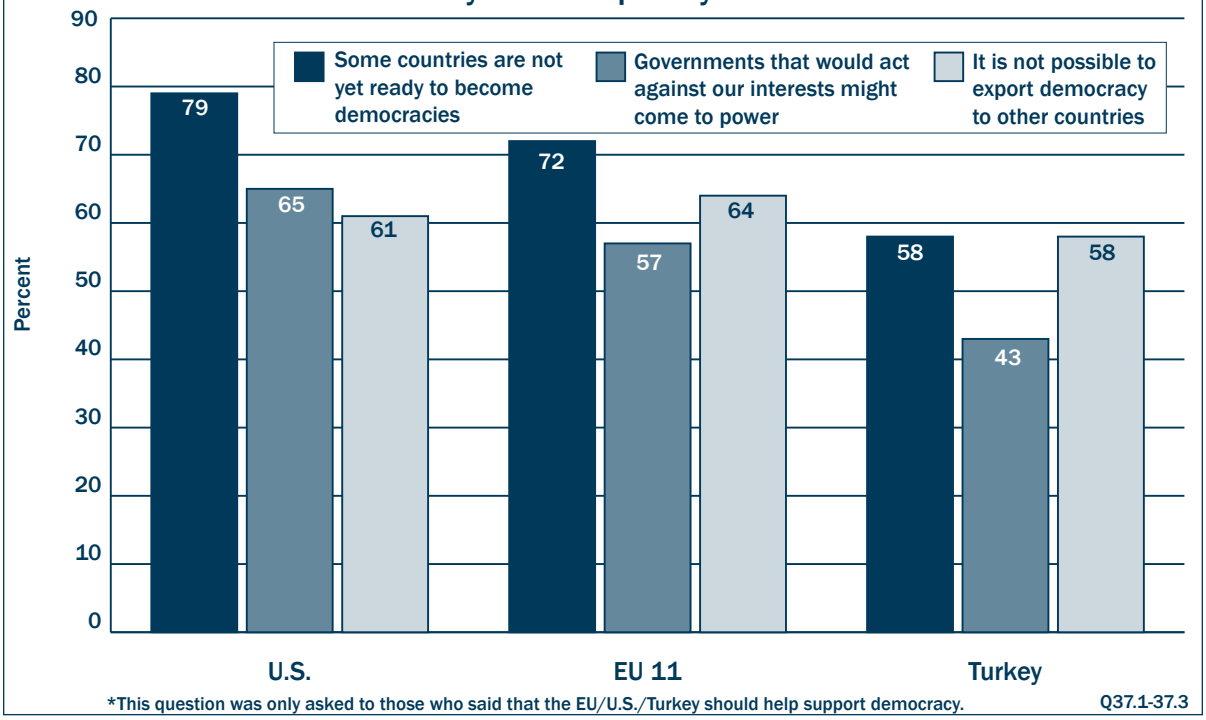
MECHANISMS FOR SUPPORTING DEMOCRACY ARE POPULAR — EXCEPT MILITARY INTERVENTION

Respondents who said the EU/United States/Turkey should help support democracy in the Middle East and North Africa were then asked what they would like to see done. As shown in chart 34, those who wanted to help establish democracy were very supportive of providing assistance to political parties, support for civil society groups, election monitoring, and economic aid for development. However, when asked about sending military forces to help remove nondemocratic governments, support dropped sharply in both the EU and the United States.

FEAR OF INSTABILITY DOES NOT CHANGE SUPPORT FOR DEMOCRACY

When respondents were reminded of a potential trade-off between democratization and instability, a solid majority

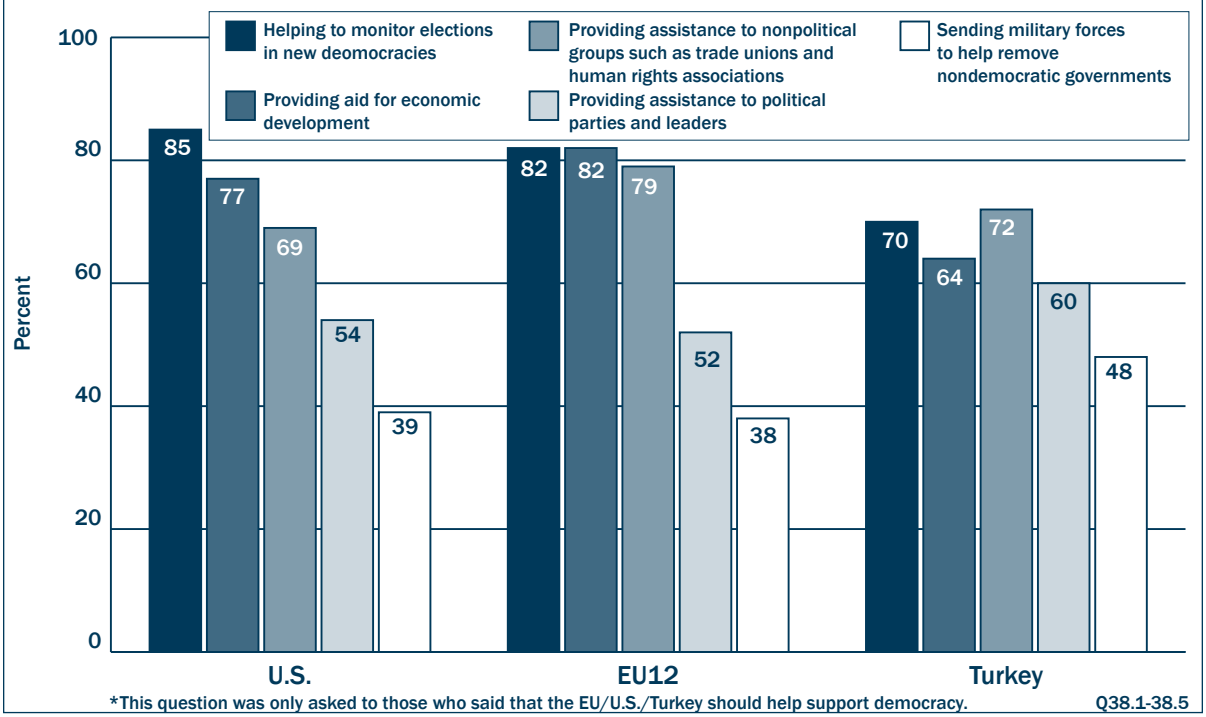
Chart 33:
Stay Out Completely Because...*



*This question was only asked to those who said that the EU/U.S./Turkey should help support democracy.

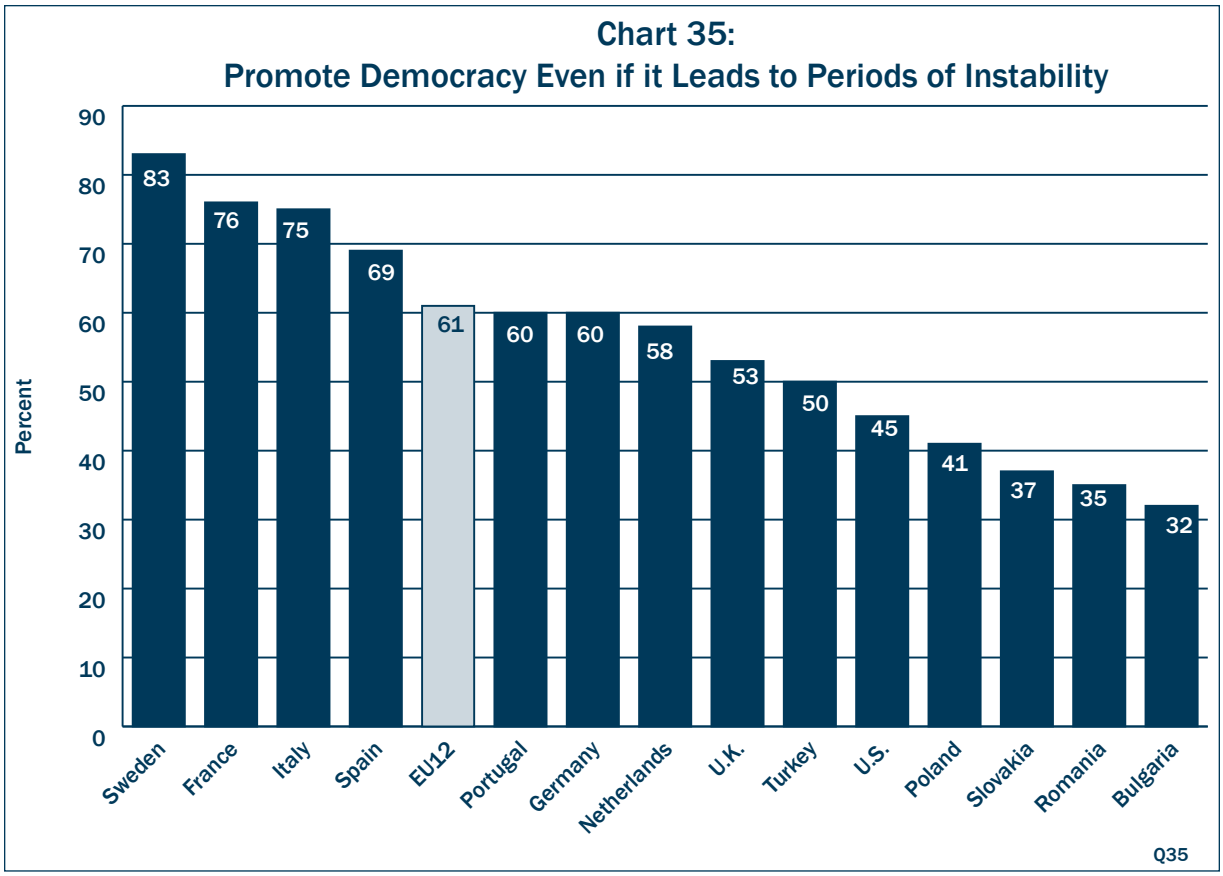
Q37.1-37.3

Chart 34:
Support for Own Country Following Various Policies in Situations Like the Middle East and North Africa*



*This question was only asked to those who said that the EU/U.S./Turkey should help support democracy.

Q38.1-38.5



of EU respondents (61%) said they would still promote democracy even if it leads to a period of instability (see chart 35). However, only 27% preferred to promote stability if that meant accepting nondemocratic governments. In the United States, respondents were evenly split, with 45% saying they would promote democracy and 42% saying they favored stability. The Turks looked much more like those in the EU, agreeing that promoting democracy (50%) is more important that promoting stability (23%) and putting up with nondemocratic governments.

On this question, the countries of Central and Eastern Europe, such as Bulgaria (32%), Romania (35%), Slovakia (37%), and Poland (41%), were the most likely to promote stability even if it meant accepting nondemocratic governments. On the other hand, the overwhelming majority of Swedes (83%), followed by the French (76%), the Italians (75%), and the Spanish (69%) favored promoting democracy even if it leads to a period of instability.

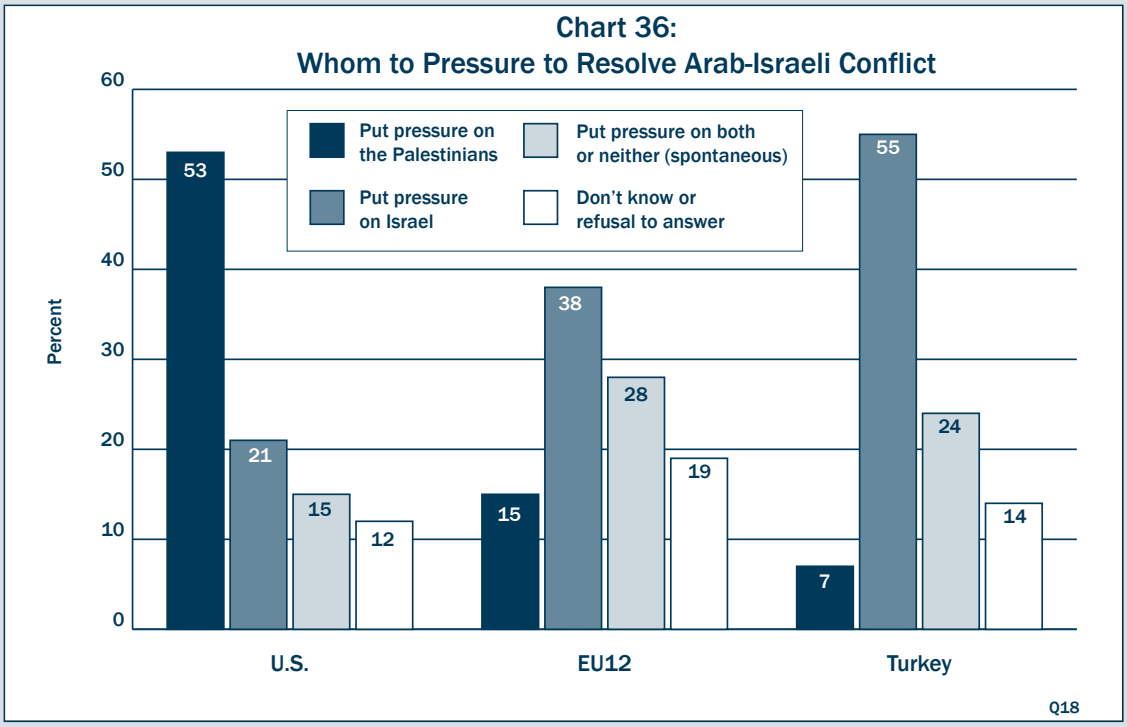
TRANSATLANTIC DIFFERENCES ON THE ISRAELI-ARAB CONFLICT

Although it is still unclear exactly how the sweeping changes in the Middle East and North Africa will affect the Israeli-Palestinian conflict, the survey revealed that there was a clear transatlantic divide when it came to addressing the issue. As in past *Transatlantic Trends* surveys, when respondents were asked about attempts to solve the Israeli-Arab conflict, EU and U.S. views differed.

A slight majority of Americans (53%) recommended putting more pressure on the Palestinians to resolve their decades-old conflict with the Israelis, while one-in-five (21%) suggested putting more pressure on the Israelis. Republicans (71%) were more likely to prefer putting pressure on the Palestinians than Democrats (49%) and Independents (50%).

In the EU, a plurality of respondents (38%) favored putting more pressure on Israel, while only 15% favored putting more pressure on the Palestinians. In Turkey, a majority (55%) preferred to put pressure on Israel, while only 7% favored putting pressure on the Palestinians.

These numbers show a strong transatlantic difference on the Israeli-Palestinian dispute. But it is important to note that 15% of U.S. respondents, 28% of EU respondents, and 24% of Turkish respondents reported that pressure should be put on *neither or both* the Israelis and the Palestinians — even though respondents were not presented with this option in the question. Also important to note is that a relatively large portion of respondents did not know how to respond to the question in the United States (12%), EU (19%), and Turkey (14%). So while a strong transatlantic divide does exist on this issue, it appears that attitudes on both sides of the Atlantic are somewhat nuanced or have yet to be formed.

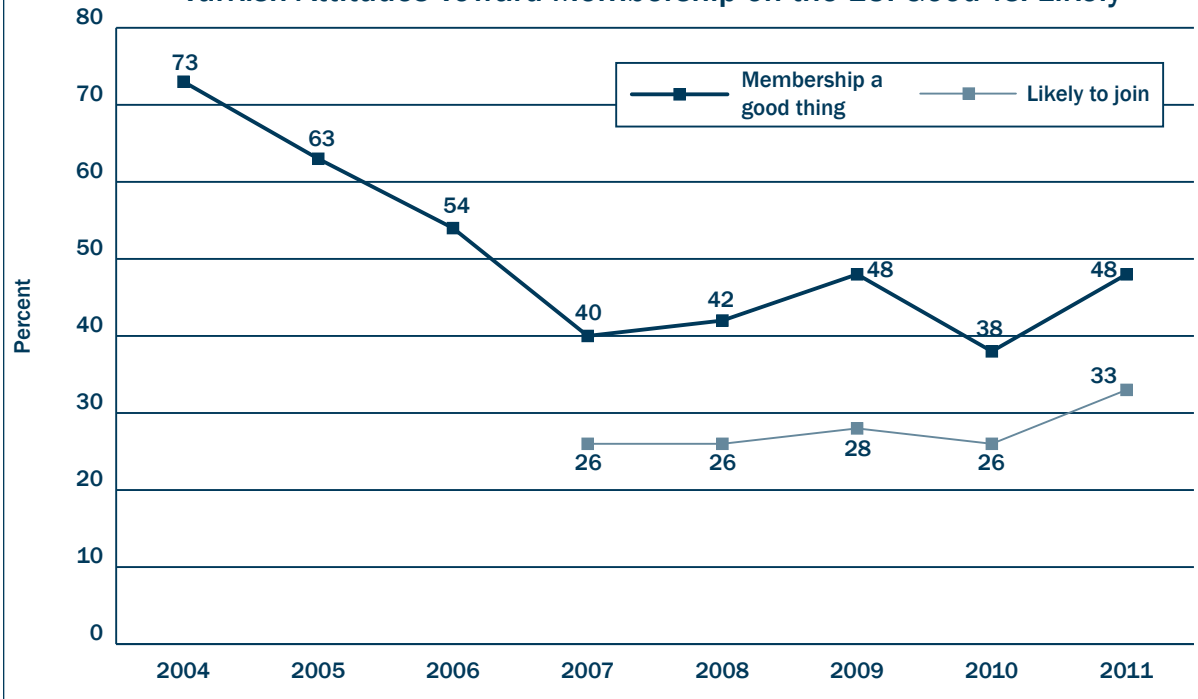


Section Six: Continuity and Change in Turkey

Turkish public opinion has shown some of the most dramatic changes since *Transatlantic Trends* started polling there in 2004. Last year's survey reported that Turkish public opinion had dramatically decreased when it came to approval of President Obama or the benefits of joining the EU. The percentage of those who believed that NATO was essential for the country's security also dipped last year, while the percentage of those who said Turkey should act in closest cooperation with the countries of the Middle East doubled. Taken all together, it looked as if Turks were turning away from the West and instead looking toward their Middle East neighbors.

This year, Turks responded a little more positively about their relations with the EU and NATO. While Turkish attitudes on these issues have shown a consistent downward trajectory over the past seven years, it appears that last year's results may have been a low point, reflecting a series of international crises that strained Turkey's relations with both the United States and the EU. These included an Israeli raid against a Turkish aid flotilla headed for Gaza, Turkey's controversial "no" vote on a UN Security Council decision to impose sanctions on Iran, and a Turkey-Brazil deal to help Iran with a nuclear fuel swap. This year, the lack of similar international crises seems to have mollified Turkish attitudes toward the West. It is too soon to tell, however,

Chart 37:
Turkish Attitudes Toward Membership on the EU: Good vs. Likely



Q24a, 24b

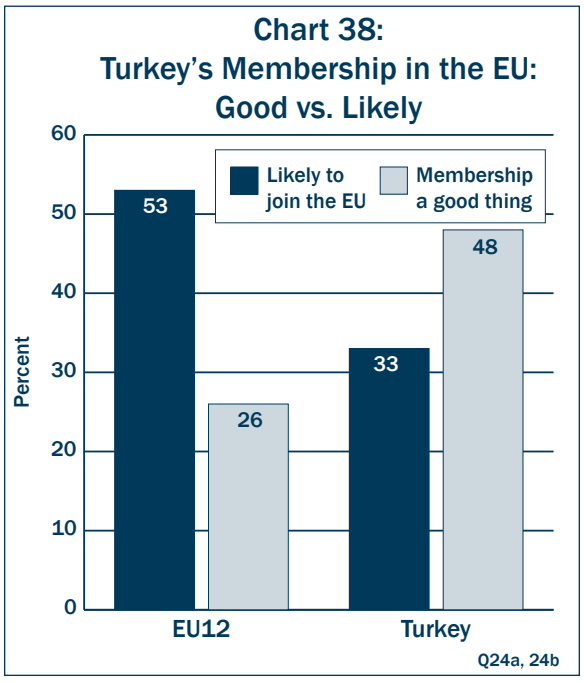
whether this marks the first year of an upward trend or merely a return to normal.

TURKEY SEES EU MEMBERSHIP MORE POSITIVELY

The 2011 data revealed a more Europe-friendly Turkish public in some respects, but also one that had a strong desire to work with Turkey's Middle East neighbors. This year, there was a ten-point increase in the percentage of Turks who thought Turkish membership in the EU would be a good thing (48%). Throughout the years, Turkish public opinion has trended downward on this topic, but this was some of the highest support for Turkish membership in the EU since 2006 (see chart 37).

A plurality of those polled in the EU thought that Turkey's EU accession would be neither good nor bad (39%) — the same as in 2010. Other respondents were almost equally divided between those who thought it would be a bad thing (29%) and a good thing (26%). Romanians were the most likely to say that Turkey's EU membership would be a good thing (48%) while the French (45%) and the Germans (40%) were the most likely to consider it a bad thing.

The percentage of Turks (33%) who thought it was likely that Turkey would join the EU increased by seven points over last year's result, but there was virtually no change in the EU, where 53% still thought Turkey's EU membership was likely. Romanians and Swedes (66% each) as well as the British (65%) and the Dutch (60%) were the most likely to think that Turkey would join the EU.



TURKEY'S EU MEMBERSHIP: FEW BENEFITS SEEN IN THE EU

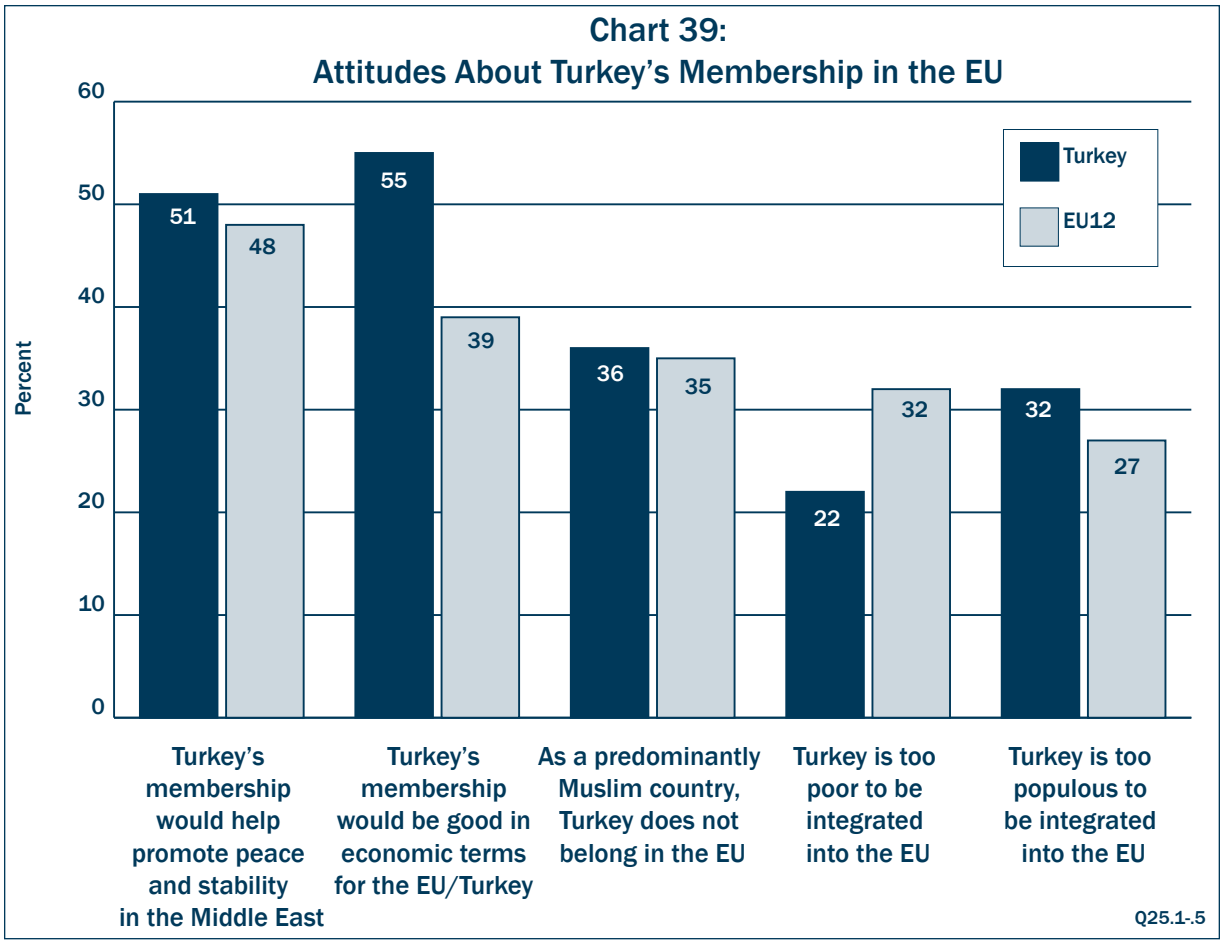
Public opinion in the EU was not totally against Turkey's EU accession, but most people were divided or pessimistic about the benefits of Turkish membership. On average, a plurality in the EU (48%) and the majority of the Americans (54%) agreed that Turkey's membership in the EU would help promote peace and stability in the Middle East. However, this was not shared in all countries; majorities in France (59%) and the Netherlands (51%) as well as a plurality in Slovakia (46%) disagreed.

TURKS SEE MORE ECONOMIC BENEFITS OF EU ACCESSION THAN EU CITIZENS

Half of those polled in the 12 EU countries disagreed that Turkey's EU membership would be good in economic terms for the EU, while 39% agreed that it would be economically beneficial. The French (63%), Swedes (62%), Germans (58%), Spanish (55%), and Dutch (54%) were the most likely to see Turkey's EU membership as negatively affecting the EU economy. The majority of Turks (55%), on the other hand, thought that EU membership would be good for the Turkish economy.

ISLAM, POVERTY, OR SIZE NOT SEEN AS OBSTACLES TO TURKEY'S EU INTEGRATION

The majority of those living in the EU countries surveyed (56%) — including relatively strong majorities in Sweden (66%), the U.K. (65%), Spain (64%), and Germany (62%) — did not believe that Turkey's predominantly Muslim population was a reason to keep Turkey out of the EU (see chart 39). A majority of Bulgarians (58%) and pluralities of Poles (46%) and Slovaks (48%) believed that EU membership for a predominantly Muslim population might be a problem. A little more than one-third of the Turks (36%) themselves thought that Turkey did not belong in the EU because it was a predominantly Muslim country. However,



this number was higher in 2005, when 43% of the Turks thought that, as a predominantly Muslim country, Turkey did not belong in the EU.

Just about one-in-three of those polled in the EU (32%) agreed that Turkey was too poor to be integrated into the EU, while 58% said that Turkey's poverty was no barrier to accession. Bulgarians (19%) and Romanians (13%) were the least likely to see poverty as an obstacle to EU membership for Turkey; these two countries also have very similar levels of GDP per capita as Turkey. Only about one-in-five Turks themselves (22%) agreed that Turkey was too poor to be integrated into the EU, perhaps reflecting the country's stellar economic growth in recent years. When *Transatlantic Trends* last asked this question in 2005, 36% of the Turks thought that their country was too poor to join the EU.

Less than three-in-ten (27%) of EU respondents thought that Turkey was too populous to be integrated into the EU, while 61% did not think that was a problem. Around one-third (32%) of the Turks agreed that the country was too populous for EU membership.

Relatively few Americans (26%), Turks (22%), or those in the 12 EU countries (19%) were concerned that if Turkey's membership in the EU was delayed, the country would drift away from the EU.

TURKEY, THE NOT-SO-LONE WOLF

Recent Turkish foreign policy that has promoted positive relationships with the country's neighbors appeared to be in line with Turkish public opinion. One-in-five Turks (20%) thought that on international matters Turkey should act in closest cooperation with the countries of the Middle East, echoing similar support in 2010.

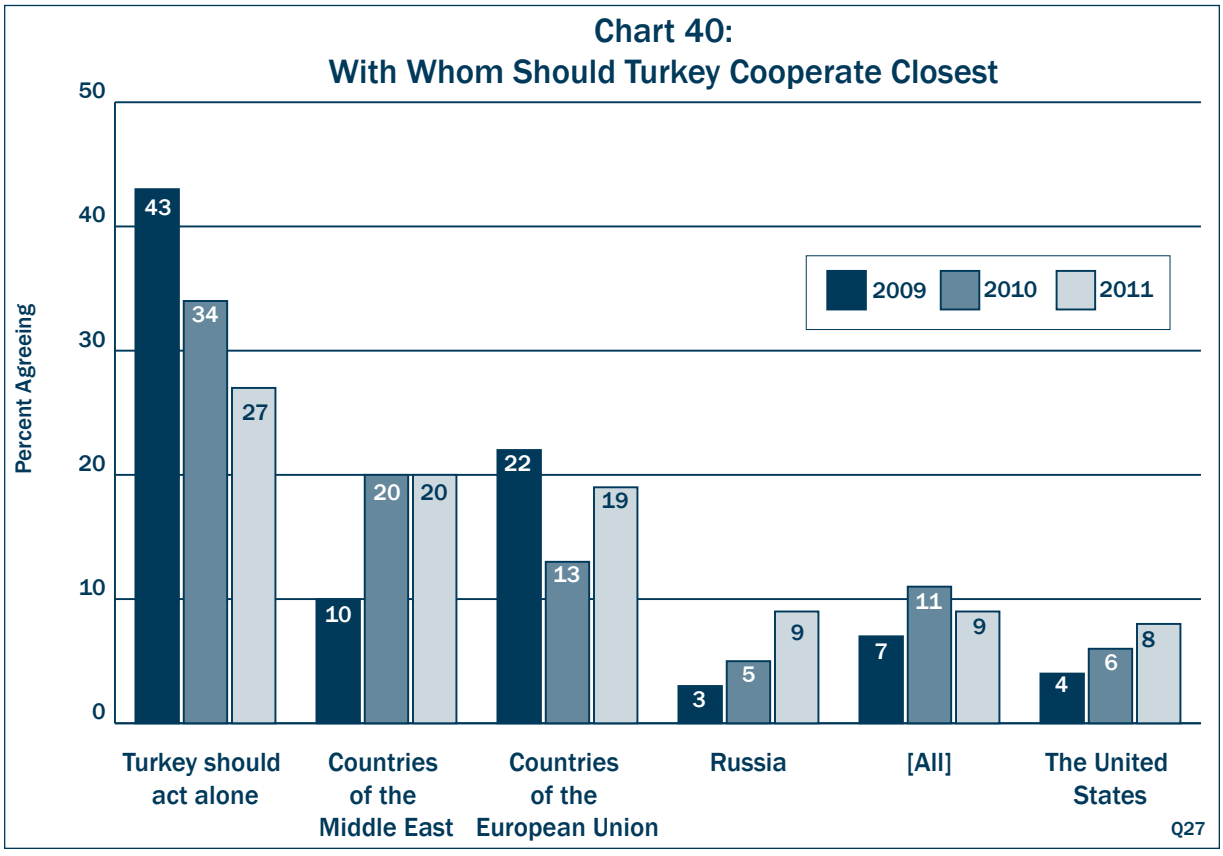
However, the percentage of Turks who thought their country should ally with the nations of the European Union increased by six percentage points over last year to 19%. While the plurality of the Turks (27%) said that their country should act alone, this number is down from 34% last year. Relatively few Turks thought their nation should cooperate most closely with Russia (9%) or the United States (8%).

TURKEY'S MIDDLE EAST NEIGHBORS SEEN MORE VITAL TO ECONOMY AND SECURITY THAN THE EU

While in this year's survey, more Turks saw the benefits of joining the EU and there was an increase in the percentage of those who thought the country should cooperate with the countries of the EU the closest on international matters, the plurality of Turks (43%) considered their neighbors in the Middle East as more important to the country's economic interests than countries of the European Union. Still, a considerable number, one-in-three (33%), named the EU as being more important. In terms of Turkey's security interests, 42% of the Turks felt that the country's Middle East neighbors were more important than the countries of the EU.

TURKEY–UNITED STATES RELATIONS COOLING DOWN

While Turks seemed to have a more positive view of the EU and NATO this year and EU respondents also had more positive attitudes toward Turkey, favorability toward Turkey among Americans decreased by eight percentage points, with 42% having a positive opinion of Turkey. There was a similar seven point drop in the percentage of those Americans who considered Turkey's membership of the EU as a good thing (34%). The plurality of Turks (34%) described current relations between the United States and Turkey as bad, with 28% saying ties were mixed and 27% saying they were good. Among Turks, 62% had an unfavorable opinion of the United Sates. But the intensity of that anti-Americanism has subsided somewhat. This year, 38% of Turks had a *very* unfavorable opinion of the United States, an 11 percentage point drop since 2010.



TRANSATLANTIC TRENDS

Methodology

TNS Opinion was commissioned to conduct the survey using Computer Assisted Telephone Interviews in all countries except Bulgaria, 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 between May 25 and June 17, 2011.

For results based on the national samples in each of the 14 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 EU 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, averages were weighted on the basis of the size of the adult population in each country to maintain consistency with previous years' reports. For new questions starting in 2010, the results were also weighted so that the sample matches certain population characteristics, including age, gender, and education.[1]

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

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, they are calculated using the the EU7 average from 2002-2003, EU9 from 2004-2006, EU11 from 2007-2010, and EU12 for 2011.

Year	Total Coverage	European Coverage
2002	U.S. + E6	France, Germany, Italy, The Netherlands, Poland, The United Kingdom
2003	U.S. + E7	France, Germany, Italy, The Netherlands, Poland, The United Kingdom, Portugal
2004–2005	U.S. + E10	France, Germany, Italy, The Netherlands, Poland, The United Kingdom, Portugal, Turkey, Slovakia, Spain
2006–2010	U.S. + E12	France, Germany, Italy, The Netherlands, Poland, The United Kingdom, Portugal, Turkey, Slovakia, Spain, Bulgaria, Romania
2011	U.S. + E13	France, Germany, Italy, The Netherlands, Poland, The United Kingdom, Portugal, Turkey, Slovakia, Spain, Bulgaria, Romania, Sweden

Table of 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	EU11 countries plus Sweden

For more detailed methodology and topline data, please visit **www.transatlantictrends.org**

[1] Trend questions (those asked before 2010): Q1a, 1b, 3, 7.1, 7.2, 8, 9, 10a, 13.1, 14a, 17, 19, 22, 23, 24a, 24b, 27, 33, 34

New questions (those asked since 2010): Q2, 4, 5, 6, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.9, 10b, 11, 12a, 12b, 13.2, 14b, 15, 16, 18, 20a, 20b, 25, 26a, 26b, 28a, 28b, 29, 31, 32, 35, 36, 37, 38, 39, 40, 41



TRANSATLANTIC TRENDS

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