

Support for the European Union and Perception of Europe in Turkish Public Opinion 2019



Economic Development Foundation
Publication No: 308

**Support for the European Union and Perception of
Europe in Turkish Public Opinion 2019**

has been conducted by The Economic Policy Research Foundation of Turkey (TEPAV) in cooperation with The Economic Development Foundation (IKV) with the support of The Union of Chambers and Commodity Exchanges of Turkey (TOBB).

This publication is translated by Leyla Tunç Yeltin.

April 2020

ECONOMIC DEVELOPMENT FOUNDATION

Esentepe Mahallesi, Harman Sokak,
TOBB Plaza No: 10, Floor: 7-8
Şişli İstanbul / Turkey
Phone: +902122709300
Telefax: +902122703022
ikv@ikv.org.tr

IKV BRUSSELS OFFICE

Avenue de l'Yser 5-6
1040 Brussels / Belgium
Phone: +3226464040
Telefax: +3226469538
ikvnet@skynet.be

Quotation can be made citing the names of the writers and
THE ECONOMIC DEVELOPMENT FOUNDATION



Publication No: 308
ISBN: 978-605-7756-02-2

Design and Publication



General Director: Gürhan Demirbaş
Editor: Hüseyin Vatansever
Graphic Designer: Şahin Bingöl

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Abbreviations

CEPII	:	Research and Expertise on the World Economy
EEC	:	European Economic Community
EU	:	European Union
Eurostat	:	European Statistics Office
HS	:	Harmonised System
IKV	:	Economic Development Foundation
MENA	:	Middle East and North Africa
OECD	:	Organisation for Economic Development and Co-operation
TEPAV	:	The Economic Policy Research Foundation of Turkey
TOBB	:	The Union of Chambers and Commodity Exchanges of Turkey
TURKSTAT	:	Turkey Statistics Institute (TÜİK)
USA	:	United States of America

Foreword

The opinion and the perception of the Turkish public have always played an important role in view of Turkey's relations with the EU, and this role has become even more important after the accession negotiations started. The EU membership means a transformation of the whole society, something far beyond a mere foreign policy issue; and this is why the public opinion matters. It is obvious that alignment with the EU acquis requires judicial and administrative reforms, but in order that these reforms are absorbed and that they reach all the segments of the society, the background internalization of EU's ideals and values is a must. The EU membership project cannot be realized only by the elites; the wider public should also participate in the process, be well informed and give its support.

This research which is conducted together with the Economic Policy Research Foundation of Turkey and with the support of the Union of Chambers and Commodity Exchanges of Turkey; and of which the field study is run by MetroPOLL Research Company, aims to measure the support for the EU and the European perception in Turkish public. The study is based on public surveys conducted by the IKV in 2015, 2016 and 2017. The main findings of this year's research are particularly interesting:

- The public opinion research was conducted between April 26, 2019 and May 12, 2019, in 35 cities, with 4,506 people by way of face-to-face interviews. Error margin is calculated as +/-1.46%.
- 93% of the participants said they heard about the EU before, and 67% said they were knowledgeable about the EU.
- As an answer to the question "do you support Turkey's EU membership?"; 60% of the participants said they supported, 35% said they did not support and 4%

said they did not have any idea. The support for Turkey's EU membership was 78.9% in the research conducted in 2017; 75.5% in 2016 and 61.8% in 2015. Thus, this year the support in the public for EU membership decreased to 2015 level. The support for EU membership was highest in Southeast Turkey with a ratio of 66%, and lowest in Northeast Turkey with 54%. 64% of female participants and 57% of male participants supported EU membership. Demographically speaking, the highest support ratio was observed in '18-24' age group with 66%. As for education levels, highest support was measured among high school and university graduates as 67% and 66% respectively.

- The percentage of the ones who believe that Turkey will become an EU member was 23%. This ratio was 30% in 2015, 36% in 2016 and 31% in 2017. As the problems increased in Turkey – EU relations, the belief that the membership would become a reality started to fade away. The highest ratio was in Southeast Turkey with 34% whereas the lowest was recorded in Western cities as 19%.
- Regarding the direction of change in the belief that Turkey will become an EU member; it was observed that in 50% of the participants there was no change, in 41% the belief was diminished and only in 9% it was enhanced.
- 78% of the participants said the biggest obstacle for Turkey's EU membership was prejudices emerging from cultural and religious differences. This was followed by Turkey's economic development level with 29% and problems in democracy and human rights with 28%. It is observed that the general public in Turkey believe that Turkey is being approached with prejudice.
- EU represents prosperity and economic development for 37% of the participants, democracy and freedom for 21%, decline and fall for 12% and free movement and abolishment of boundaries for 12%. Among the ones who supported Turkey's EU membership; for 49% the EU meant prosperity and economic development and only for 2% it meant decline and fall. Among the ones who did not support Turkey's EU membership, for 31% it meant decline and fall and only for 16% it meant prosperity and economic development. The profound difference concerning the perception of the EU between the participants who did and did not support Turkey's EU membership, can be interpreted as a sign of social polarization and deep differences in philosophy of life.
- As for the question regarding the main contribution of EU membership to Turkey; 47% of the participants said free movement, 33% said increased job opportunities, 32% said opportunity to benefit from EU budget and funds, 24% said improvement in democratic standards, 18% said participation

in EU institutions and decision making process and 11% said increase in international power and reputability. Hence, it is observed that the support for EU membership mostly stems from the expectation that it will bring practical benefits to the everyday life of the people.

- The number one agenda item in Turkey – EU relations according to 38% of the participants was refugee crises, to 27% it was membership negotiations, to 17% visa exemption and to 13% it was the Customs Union. In the research done in 2017, the refugee crises came third preceded by visa exemption and Customs Union respectively. The change of rank this year indicates a raising awareness in Turkey concerning the refugees. Another point worth mentioning is related to the accession negotiations. Last year, this item ranked fourth with 6.1%. The fact that it came second this year shows an increase in the Turkish public's expectations in this area; it can even be interpreted as a growing impatience.
- 48% of the participants considered Customs Union beneficial both for Turkey and the EU, 24% said they had no idea and 18% said it was not beneficial at all. A good ratio of the participants, a 64% said both sides would benefit from the modernization of the Customs Union.
- Among the ones who supported Turkey's EU membership; 75% said they support it for prosperity and economic development, 57% for improvement in democracy and human rights standards, and 45% said for the right to free movement, establishment and education in Europe. Among the ones who did not support Turkey's EU membership; 59% said they did not support as they thought it would damage identity and culture, 24% said the EU had no future and 20% believed membership would weaken Turkey's foreign relations. We see that the main reason for support is expectations regarding economic and democratic welfare; and the main reason for not supporting is the concern about identity and culture.
- According to 49% of the participants the best relationship between Turkey and the EU would be membership, to 29% it would be carrying on with the Customs Union, and to 19% the establishment of a privileged partnership. Hence we see that a significant majority still believe the ideal relation is Turkey's EU membership.
- 54% of the participants thought Turkey needed the EU economically, whereas 46% think it did not. 46% is a high ratio and it shows the high conviction the Turkish people have in Turkey's on-going development perspective.

- 60% of the participants said Turkey had the administrative and institutional capacity needed for EU membership. 57% said Turkey has fulfilled its commitments to become an EU member.

We hope that this research executed by IKV and TEPAV with the support of TOBB and based on the public opinion survey conducted by MetroPOLL Centre for Strategic and Social Research, will be helpful for all the related parties.

Economic Development Foundation

Executive Summary

The EU is a transnational organization that set its journey with the aim of establishing peace among its members, targeting economic, political and social harmony and increasing the welfare level of its citizens by sustainable economic development. The EU differs from other organisations by its transnational status and the set of values it is based upon. As stated in the EU Treaties, the Union is established upon the values of human dignity, freedom, democracy, equality, rule of law and respect for human rights including minority rights. These values and plurality, principle of non-discrimination, tolerance, justice, solidarity and gender equality should be respected by all Member States. Those European countries embracing and respecting these values can apply for EU membership.

The EU whose foundations date back to 1951 is composed of 28 countries today. Turkey has been a joint member of the EU (then EEC) since 1964 and established Customs Union with the EU in 1996. It applied for membership in 1987 and after the official approval of its candidacy status in 1999, the relations entered into a new phase. The accession negotiations were launched in 2005 and the “pre-accession process” started. Today, this process is still going on officially. In the meantime, the modernization and widening the concept of the Customs Union in accordance with the requisites of our day is also at the table. “Research on the Support for European Union and European Perception in Turkish Public 2019” was executed by IKV and TEPAV with the support of TOBB. This research has been conducted with the aim of identifying the public’s knowledge and awareness levels concerning Europe and the EU in Turkey, and of analysing the views in Turkey concerning the country’s EU membership.

Turkey's EU accession process that has been going on approximately for 14 years is highly significant for both parties regarding political, economic, foreign policy and security aspects. Hence, it is important to observe the change in Turkish people's perception towards the EU in time; to collect and analyse the data obtained and to share these objective, accessible and data based analysis with the stakeholders in public and private sector. This would help establish a suitable ground for future policy design. The "Research on the Support for European Union and European Perception in Turkish Public" IKV conducted in 2015, 2016 and 2107 were developed content and method-wise and were integrated in the research of 2019.

The fieldwork was conducted by MetroPOLL Centre for Strategic and Social Research in 35 cities all around Turkey using samples specified by stratified sampling method and by taking into consideration the TURKSTAT data. It was conducted by using face to face in house interview method with 4,506 people over the age 18 between April 26 and May 12, 2019. Gender, age, education and voting behaviours in June 24, 2018 parliamentary elections were used as basis to weigh the results of the fieldwork. The research was completed in 0.95 confidence bounds and with +/-1.46% tolerance.

The basal gender, age and education indicators used in weighing process of the fieldwork of the research provide a picture similar to Turkey's official statistics. Within this framework, when the profiles are analysed it is seen that 50.8% of the participants are female and 49.2% are male. As for age parameters it is understood that 21% of the participants are from '25-44' age group (the highest percentage). As for level of education, it is seen that primary school graduates come first with a 28% portion. Employment parameters show that, the participants in the fieldwork are mainly from private sector with a high percentage like 43%. The fieldwork analyses are based on quadruple geographical regions, and one other grouping category is migration status of cities whether they are migrant sender or receiver.

You can find detailed information concerning the public opinion research profile under the headline "Introduction and the profile of the public opinion research". Following that section, the results of the fieldworks and desk works are summarized under the headings of "Contact with the EU", "Familiarity with the EU", "Support for EU membership", "Belief in EU Membership", "What does the EU and EU membership mean for Turkey", "Turkey's EU membership performance" and "EU's agenda". The findings are elaborated in detail under each heading and are summarized as follows.

Contacting the EU

The survey results reveal that 12% of the participants have been to a European country at least once. Among the visited European countries, Germany with 42% comes first. As for the purpose of visit; touristic or vacation purposes come first with 64%.

13.4% of the participants say they speak English, 10.2% Kurdish, 2.3% Arabic, whereas 71.6% say they do not speak any other language than Turkish. Thus, it is safe to say English is the most spoken second language among the participants.

Familiarity with the EU

93% of the survey participants say they have already heard about the EU, whereas 7% say they never heard about the EU before. While we observe an increase in the number of people who have heard about the EU before over the years, the existence of regional differences in the ratio of familiarity with the EU we see in 2019 results is interesting. As a matter of fact, the ratios about familiarity with the EU in Northeast and Western regions are higher than those of Central and Southeast regions. Another finding is that female participants have heard about the EU less than the male. In group calculations as to who has not heard about the EU before, the young people (ages 18-24) have the highest rate. It is also found that the level of education and the increase in the familiarity with the EU run parallel. Concerning occupation, the least familiar participants emerge among housewives and students.

As the aim of this section is to measure the participants' familiarity with the EU, no further questions were asked to those who said they haven't heard about the EU before. Among the 4,200 participants who have heard about the EU before 67% positively answered the question "are you knowledgeable about the EU?". This shows that in Turkish public, although the awareness about the EU is high, actually knowing about the EU is not as high. Besides, the ratio of people who do not know about the EU among the people who have heard about it before is the highest in Western region. Women, young and old people, housewives and students have lower ratios in knowing about the EU. As the education level increases, the ratio of being knowledgeable about the EU increases as well.

The fieldwork shows the conventional media is by far the most important source of information about the EU. Following are the internet and social media and the family members and acquaintances living in the EU countries. It is striking how few

the answer options like “foreign friends and acquaintances”, “foreign news sources”, “official web sites of EU institutions”, “EU funds and projects in Turkey”, “activities of public institutions of Turkey” and “civil society organisations” are ticked by the participants.

The participants regard the EU as the third most important political partner following the Russian Federation and the USA. As economic partners, they say the EU comes second after the Russian Federation. However, in reality the EU countries constitute Turkey’s main export and import markets. Since 1996, nourishing upon the facilities provided by the Customs Union, Turkey has increased its market share in the EU from 0.7% to 1.5%. The sectorial and commodity breakdown of Turkey’s exports to the EU show that the EU is also a market for Turkey’s quality products. If we examine the technological breakdown of EU direct investments in Turkey, we see that EU’s share is high in quality investment. The EU countries are Turkey’s important partners in trade and investment. The results of the survey show the majority of the participants (54%) say that Turkey needs the EU economically. It is highly probable that the current trade and investment connections would affect the importance of the EU in Turkey in the eyes of the public. On the other hand, in Southeast and Northeast regions where the perceived need for the EU is higher, the EU’s share within the export baskets is low vis-à-vis other regions. In addition to regional breakdown, evaluation based on gender shows women, and evaluation based on age shows the young people (age 18-24) have a higher perceived need for the EU. As the education level increases an increase in the perceived need for the EU is also observed. The evaluations based on employment groups show the unemployed participants, followed by students and private sector employees think Turkey highly needs the EU in economic terms.

Support for EU Membership

The survey results reveal that 60% of the participants support Turkey’s EU membership. However this indicates a decline compared to the results of different surveys of the past. The quadruple geographic region based analysis shows that the highest support for Turkey’s EU membership is in Southeast region, the lowest is in Northeast region. Survey shows, in women and in young people (age 18-24) support for EU membership is higher. High school and university graduates rank highest in support for EU membership in education groupings. As for employment groupings; the highest support for EU membership is measured in unemployed people and in students.

While the participants who support Turkey's EU membership support it due to a highest reason of (75%); "prosperity and economic development"; the concern of the participants who do not support Turkey's EU membership is: "it will undermine Turkish culture and identity". The reasons behind the support in membership do not significantly vary according to region and gender; however an evaluation according to age groups shows that among people 65 and over, the main reason for support is "increase in democracy and human rights standards".

According to 49% of the participants the most appropriate sort of relationship between Turkey and the EU is "full membership". This answer option finds more support among female participants and in cities receiving migration. Among the participants who do not support Turkey's EU membership, the most suitable relation is mentioned as "the continuation of the Customs Union".

Belief in EU Membership

23% of the participants of the 2019 survey believe that Turkey will become an EU member. The belief level in female participants and youth is relatively higher. According to quadruple geographical region range, it is observed that the level of belief increases in Southeast and decreases in Northeast in relation to other regions. The option "prejudices based upon religious and cultural differences" receives 78% of the answers as being the main obstacle before Turkey's EU membership.

The Meaning of the EU and EU Membership for Turkey

The meaning of the EU according to the 37% of all the participants is "prosperity and economic development". This ratio is 49% among the participants who support Turkey's EU membership. According to the participants who do not support Turkey's EU membership the EU means "decline and fall" with 31%. An evaluation of the answers according to age groups shows that the EU means "prosperity and economic development" for 18-64 age group and "democracy and freedom" for 65 and over.

The main benefit of EU membership according to the participants is "free movement" with 47%, followed by "new employment opportunities" with 33%. According to quadruple geographic region range, "free movement" finds most supporters in West region, whereas in Southeast region the most important expectation from membership is "new employment opportunities".

Turkey's EU Membership Performance

60% of the participants think Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership. It is interesting that the ratio of the participants who think that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership is 64% among the ones who do not support Turkey's EU membership. Whereas, the participants who are 65 years and over have the highest ratio to believe that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership, in '18-24' age group this belief corresponds to a lower level than average. The civil servants constitute the highest level (73%) of belief that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership, whereas the students believe the lowest with 42%.

57% of the participants believe that Turkey has fulfilled the necessary obligations to become an EU member. The age groups analyses show that the belief that Turkey has fulfilled its obligations increase parallel to age increase.

EU's Agenda

The majority of the participants think with 38% that the main issue between Turkey and the EU is the "refugee crises". This option receives the least support from the Southeast with 24%, where the main issue is regarded as the "accession process" with 47%. The private sector employees think the "refugee crises" is the most important issue with a ratio of 41%, whereas in the retired participants group, this ratio is 32%.

48% of the participants believe the Customs Union is beneficial both for Turkey and the EU. The participants also consider with a ratio of 64% that the modernization of the Customs Union will be beneficial both for Turkey and for the EU. This ratio increases as the level of education increases. 58% of the participants who support Turkey's EU membership also think that the Customs Union is beneficial both for Turkey and the EU. Among the participants who do not support Turkey's EU membership, 33% thinks Customs Union is beneficial both for Turkey and the EU whereas 26% thinks it is beneficial only for the EU.

In order to better evaluate the change in the public's approach to the EU and to current developments, following the fieldwork conducted in April, another set of questions were prepared in August with a limited scope so as to back up the first fieldwork. The said work was conducted by MetroPOLL Centre for Strategic and Social Research in 28 cities using samples specified by stratified sampling and weighing methods. It was conducted by using face to face method with 1,805 people between August 20-26, 2019. The back-up research of August was completed in 0.95 confidence bounds and with +/-2.31% tolerance.

In the back-up survey conducted in 2019 we see a decline in the support for EU membership in May-August term. The questions about knowing about the EU and having heard of the EU were asked again for verification purposes and the results obtained were similar to the ones received in April. When, in the August fieldwork the question "Do you support Turkey's EU membership" was asked, 44% of the participants said they did. As a matter of fact, when the same question was asked in April, 60% of those who said they were knowledgeable about the EU supported the membership, however in August the ratio of participants knowledgeable about the EU who supported Turkey's EU membership declined to 54%. The sectorial distribution was also examined in August fieldwork and the group that mostly supported Turkey's EU membership stood as the manufacturing industry employees. In an effort to measure the support for EU membership from another perspective; the following question was asked in the August fieldwork: "If all the legal obligations for Turkey to become an EU member is fulfilled and there is a referendum concerning Turkey's EU membership next Sunday; would you vote for membership?" Among the participants who were knowledgeable about the EU, 50% said yes, whereas among the ones who did not know about the EU the ratio declined to some 20%. Therefore, when the fieldwork is repeated on the basis of similar questions, it is observed that the answers may vary from April to August.

In the course of the back-up fieldwork in August, questions about the current events were also asked to the participants. In the face of the question "do you know the reaction of the EU concerning Turkey's search for natural gas and petroleum in Northern Cyprus?" 75% of the participants say "no, I don't know", and 25% of them say "yes, I know." While it is interesting that the ratio of the participants answering "they know" such a relatively specific question is high; when the participants who said they knew were asked an open ended question as "can you please describe EU's reaction", the answers like "leaving Turkey alone", "getting a part of

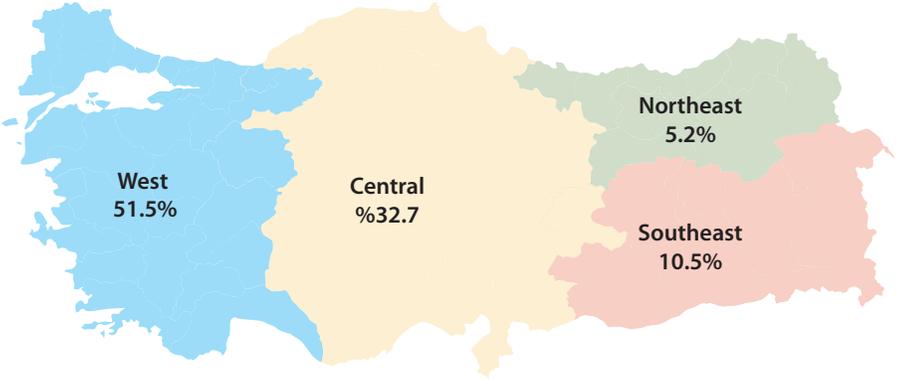
Turkey's gains" were gathered. When the participants were asked "Are you aware about the alliance in East Mediterranean between Greece, Israel, Egypt and Greek Administration of Southern Cyprus?", 17% of them said yes while 83% said no. The ones who said yes was asked the open ended question of "What is the purpose of this alliance?"; the most common answers were like "a union of forces against Turkey" and "search for natural gas/petroleum".

A. Introduction and the Profile of the Public Opinion Research

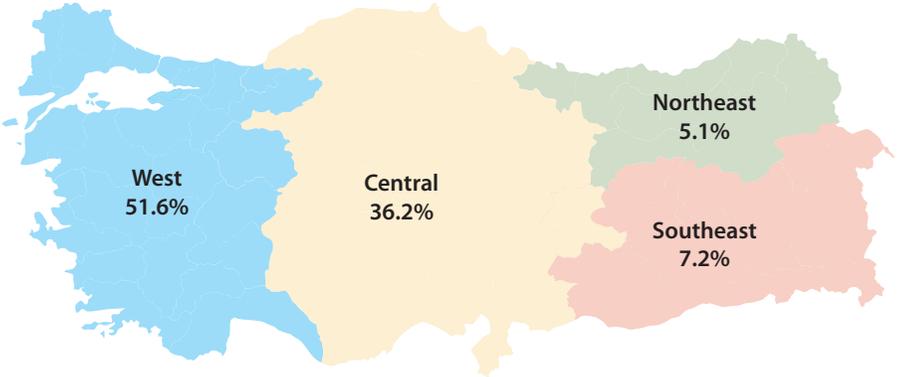
The EU is a transnational organization that set its journey with the aim of establishing peace among its members, at the same time targeting economic, political and social harmony, increasing the welfare level of its citizens by sustainable economic development. The EU differs from other organizations with its transnational status and the universal values it is based upon like democracy, human rights, rule of law. The EU whose foundations date back to 1951 is composed of 28 countries today. These countries are in alphabetic order; Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Greek Administration of Southern Cyprus, Hungary, Italy, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Spain, Slovakia, Slovenia, Sweden and the United Kingdom (UK). Turkey has the status of candidate country together with Albania, Montenegro, Northern Macedonia and Serbia. Turkey applied for full membership in 1987 and after the official approval of its candidacy status in 1999, the relations deepened. The accession negotiations launched in 2005 is still going on. "Research on the Support for European Union and European Perception in Turkish Public 2019" has been conducted in cooperation of IKV and TEPAV with the support of TOBB. This research aims to measure knowledge and awareness of the Turkish public about the EU and Europe and to evaluate the views concerning the support in Turkey for the EU membership. The fieldwork was conducted by MetroPOLL Centre for Strategic and Social Research in 35 cities all around Turkey using samples specified by stratified sampling method and by taking into consideration the TURKSTAT data. It was conducted by using face to face in house method with 4,506 people over the age 18 and over between April 26 and May 12, 2019. The fieldwork was supported by desk work analysis.

Figure 1: Distribution of the numbers of observations in the fieldwork according to quadruple geographical regions, according to cities and Turkey comparison

Distribution of 18 and over population according to quadruple geographic regions in Turkey 2017



Dispersion of number of observations according to cities and quadruple geographic regions



The fieldwork analyses concerning the cities were made according to the quadruple geographical regions. In order that the regional tendencies are more easily established during the fieldwork analyses, 81 cities in Turkey are grouped according to their geographical features under 4 regions as West, Centre, Northeast and Southeast. This quadruple geographical region categorization is used in regional analyses as well. The dispersion of the observations gathered in the fieldwork according to this tetrad regional grouping exhibits a very similar picture to the population distribution with respect to this grouping system. Figure 1¹ above also shows the number of observations in the 35 cities where the fieldwork was conducted.

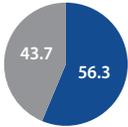
Dispersion of number of observations according to cities & quadruple geographic regions		
Quadruple geographic regions	City	Number of observations
WEST	Istanbul	851
	İzmir	261
	Bursa	182
	Manisa	181
	Antalya	176
	Kocaeli	143
	Balıkesir	109
	Tekirdağ	106
	Aydın	96
	Denizli	89
	Sakarya	76
	Eskişehir	55
	TOTAL	2325
CENTRAL	Ankara	314
	Konya	135
	Samsun	129
	Gaziantep	128
	Adana	123
	Kayseri	105
	Mersin	103
	Hatay	100
	Malatya	97
	Kırıkkale	87
	Kahramanmaraş	71
	Zonguldak	62
	Sinop	46
	Amasya	43
	Yozgat	43
	Kilis	43
TOTAL	1629	
SOUTHEAST	Batman	102
	Şanlıurfa	85
	Diyarbakır	82
	Ağrı	54
	TOTAL	323
NORTHEAST	Trabzon	129
	Erzurum	57
	Artvin	43
	TOTAL	229

Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and İKV, TURSTAT and TEPAV analyses

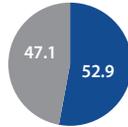
Figure 2 - Distribution of the numbers of observations in the research according to migrant sender and receiver cities and Turkey comparison

Migrant receiver cities		Migrant sender cities			
City	Number of observations	City	Number of observations	City	Number of observations
İstanbul	851	Manisa	181	Diyarbakır	82
Ankara	314	Konya	135	Sakarya	76
İzmir	261	Samsun	129	Kahramanmaraş	71
Bursa	182	Trabzon	129	Zonguldak	62
Antalya	176	Balıkesir	109	Erzurum	57
Kocaeli	143	Kayseri	105	Ağrı	54
Gaziantep	128	Batman	102	Sinop	46
Adana	123	Hatay	100	Amasya	43
Tekirdağ	106	Malatya	97	Yozgat	43
Mersin	103	Denizli	89	Kilis	43
Aydın	96	Kırkkale	87	Artvin	43
Eskişehir	55	Şanlıurfa	85		
TOTAL	2537			TOTAL	1969

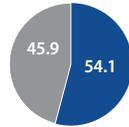
Research participants (%)



Turkey population, all ages %, 2018



Turkey population, 18 and over, %, 2018

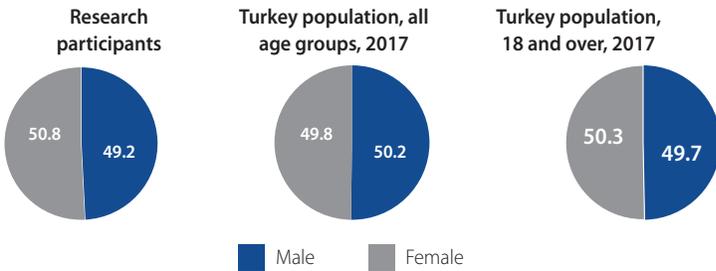


■ Migrant receiver cities
■ Migrant sender cities

Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and İKV, TURSTAT and TEPAV analyses

The sample cities are also categorized in accordance with their migrant-receiver and migrant-sender status as to form a separate level of analysis. The said analysis is made by comparison of participant's city of residence and his/her city of original registry. By the said comparison, the cities where people registered in other cities mainly live are named as "migrant-receiver cities"; and the cities where there is difference between residence city and registered city are named "migrant-sender cities"². The share of the "migrant receiver cities" in overall population is 52.9% whereas the share of "migrant sender cities" is 47.1%³. The distribution of the 18+ age range that the fieldwork focused according to migrant-receiver and migrant-sender cities is 54.1% and 45.9% respectively⁴. The observations on the overall public opinion research show that the share of migrant receiver cities is 56.3% and the share of the migrant sender cities is 43.7%. The population dispersion obtained through the fieldwork shows similarities with the overall Turkey dispersion of the migrant receiver and migrant sender cities (see Figure 2).

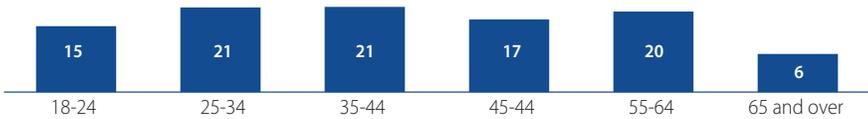
Figure 3 - Gender distribution of the research participants and Turkey comparison (%)



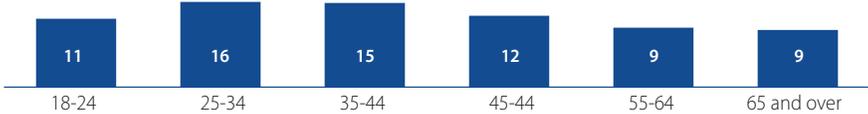
Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Figure 4 - Distribution of the research participants according to age groups and Turkey comparison (%)

Public opinion research participants



Turkey population (2017)



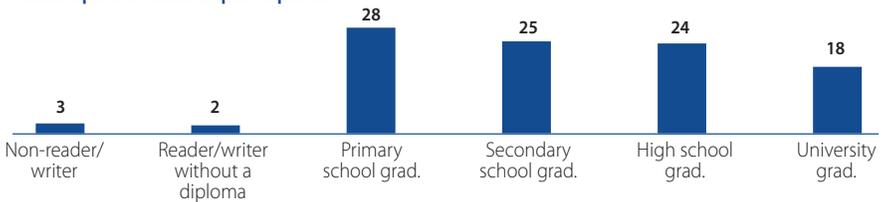
Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Gender, age, education and voting behaviours in June 24, 2018 parliamentary elections are used as basis to weigh the results of the fieldwork. The research is completed in 0.95 confidence bounds and +/-1.46% tolerance. According to the demographic data of 2018, women constitute 49.8% of the overall population whereas men constitute 50.2%⁵. If we focus on the 18 and over age group as the fieldwork does, we see that the shares of women and men are as 50.3% and 49.7% respectively⁶. Indeed, the gender dispersion used to weigh the survey results shows a similar picture with the overall population results of Turkey. The public survey with its 50.8% female participants and 49.2% male participants shows a similar view to Turkey in general (see Figure 3). Another factor in weighing the survey results is distribution of the results according to age groupings. Age groups '25-34' and '35-44' each has a share of 21% of the overall sampling. These are followed by the age

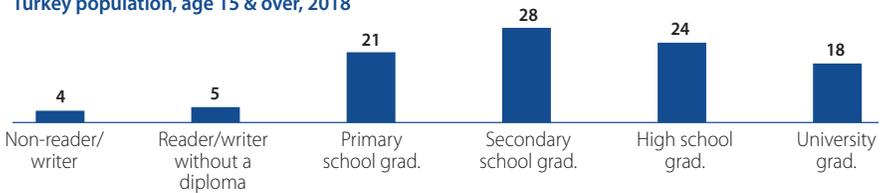
groups of '55-64' (20%), '45-54' (17%), '18-24' (15%) and '65 and over' (6%) respectively. It is seen that the specified age group sampling is compatible with Turkey's general age dispersion (see Figure 4)⁷. Another factor affecting the weighing process is the level of education. The evaluation of the dispersion of the answers given to the question "what is your education level, i.e. the last school you completed?" show; the primary school graduates take the first line with 28% share followed by respectively secondary school (25%), high school (24%) and university graduates (18%). In the sample, the 'non-reader/writer' group forms 3% whereas the 'reader/writer without a diploma' group forms 2%. This specified dispersion is also compatible with Turkey's general 15+ age population's education levels (see Figure 5)⁸.

Figure 5 - Distribution of the answers to the question "what is your education level, i.e. the last school you completed?" and Turkey comparison (%)

Public opinion research participants



Turkey population, age 15 & over, 2018

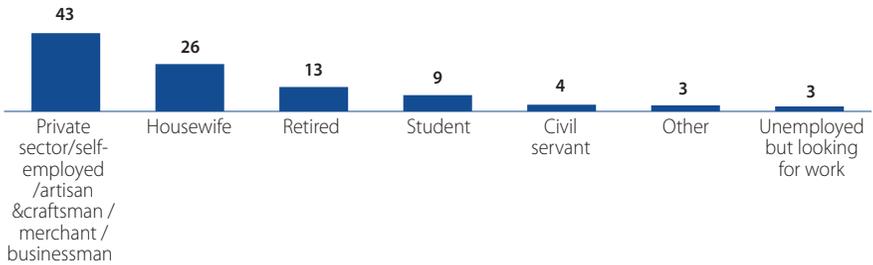


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Note: The survey question "what is your education level, ie the last school you completed?" was asked with the choice options of "non-reader/writer", "reader/writer without a diploma", "primary school graduate", "secondary school graduate", "high school graduate", "university graduate", "graduate degree/masters degree" and "pHd degree/doctorate degree"; and the last two degrees (masters and doctorate) were gathered under university graduates heading.

It is interesting to note that a majority of the participants of the fieldwork are private sector employees. According to the answers given to the question “Are you employed? What is your occupation?” we see that 43% of the participants work in private sector, followed by housewives (26%), retired ones (13%), students (9%) and civil servants (4%). The ones who ticked the “other” box and the unemployed each have a share of 3% in the sample (see Figure 6). When we examine the reasons for unemployment (age 15+) in overall Turkey; we see that 18% is due to housework, 17% to retirement, 7% to education and training⁹. These data obtained from official statistics of Turkey draws a similar picture with the research sampling.

Figure 6 - Distribution of the answers to the question “Are you employed? What is your occupation?” (%)

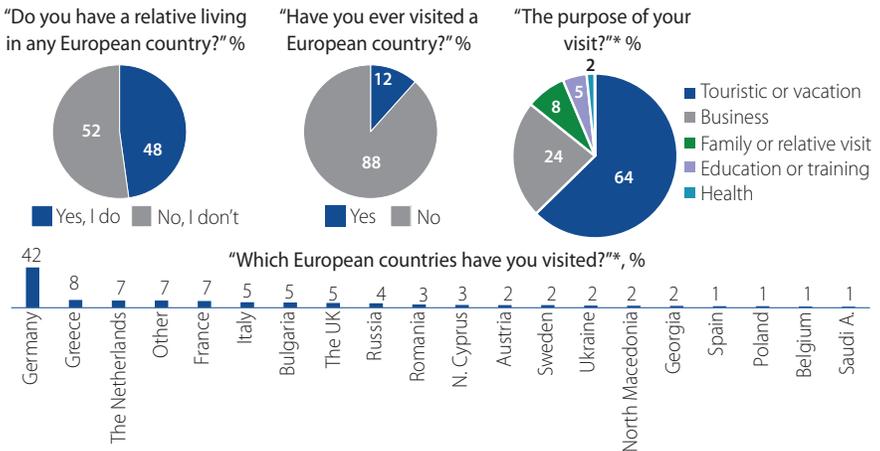


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

B. Contacting the EU

According to official statistics, 2,771 Turkish citizens visited Europe In 2018. The fieldwork shows the reasons are mainly touristic. When the visits to Europe are evaluated retrospectively, the survey shows 12% of Turkish citizens have visited Europe before. The data obtained from official statistics reveal that the ratio of Turkish citizens visiting Europe to general population vary 3-5% within the years¹⁰. During the fieldwork, when the participants were asked with a wider perspective whether they have visited any European country in the past; the share of those who did comes as high as 12%. Although 48% of the participants say they have relatives in Europe, it is interesting that 64% of the visits are “touristic and vacation purposes” and not relative visits. “Touristic and vacation purposes” is followed by “business trips” with 24%, “family or relative visits” with 8%, “education and training” with 5% and “health” 2%. Among the visited European countries, Germany comes by far the most visited one with 42%. It is interesting that 59% of the visits to Germany are touristic and only 11% is family or relatives visits. Among the answers given to the question “Which European country/countries have you visited?”; following Germany, we see Greece (8%), the Netherlands and France (each 7%). This question was an open ended one, there were no pre-established choices. So it is worth mentioning that, some of the participants wrote they visited countries like Russia, Ukraine, Georgia and Saudi Arabia, thus classifying them as European countries (see Figure 7).

Figure 7 - Distribution of the answers to the questions related to visiting Europe

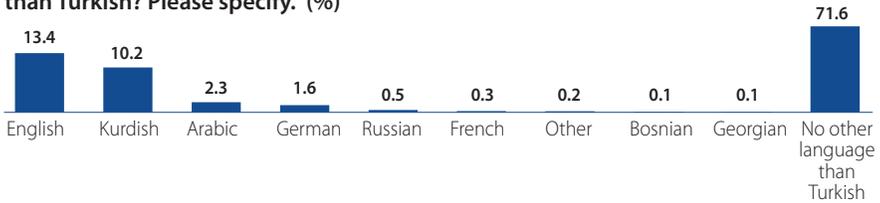


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

*the participants were allowed to make more than one choice.

28% of the participants speak a second language alongside Turkish. English strikes the eye as the most spoken second language. Among the 28.4% of the participants who positively answer the question “Do you speak any other language than Turkish?”, 47% say they speak English, 36% say they speak Kurdish and 8% say they speak Arabic. When we examine the distribution of the familiarity with a second language among the participants regardless of the fact whether they speak a second language or not, we see that 13.4% is familiar with English, 10.2% with Kurdish and 2.3% with Arabic, whereas 71.6% of the participants speak no other language than Turkish (see Figure 8).

Figure 8 - Distributin if the answers* to the questin “Do you speak any other language than Turkish? Please specify.” (%)



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

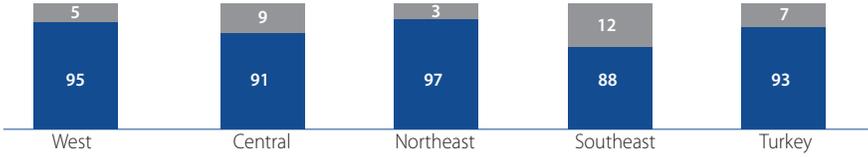
*the participants were allowed to make more than allowed to make more than one.

C. Familiarity with the EU

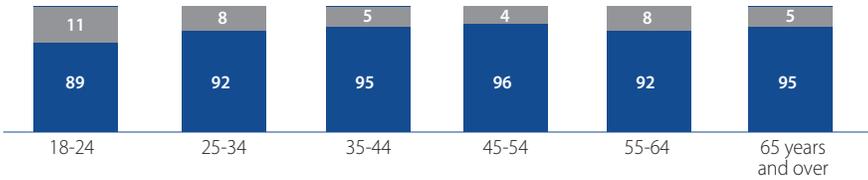
93% of the research participants say they have already heard about the EU, whereas 7% say they never before heard about the EU. In the year 2019, 93% of the participants answer the question “Have you heard about the EU?” positively. In retrospective, in 2015 as an answer to a similar question of “How much do you know about the EU?” 80% of the participants said they knew about the EU. This shows that the share of the participants who know about the EU in the current survey is higher than past years¹¹. This may lead to a conclusion that the percentage of knowing about the EU increases in years. When we examine the results of the 2019 fieldwork according to regions; we see that while the ratios of the ones who haven't heard about the EU in Northeast (3%) and West (5%) are lower; Centre (9%) and Northeast (12%) are relatively higher. In the migrant receiver cities the ratio of those who have heard about the EU is 94%, and in the migrant sender cities it is 92%. A gender wise examination shows that the ratio of female participants who does not know about the EU is 9% whereas it is 4% in male participants. As according to age groups; the group with the highest percentage of not having heard about the EU is 18-24 years of age group with 11%. Although the ratio of the participants in the '18-24' age group (the age group of university students) is low, a general look at overall Turkey shows that as the education level increases the ratio of the participants who have heard about the EU increases as well. Likewise, the ratios of not having heard about the EU are 8% among primary school graduates, 7% among high school graduates and 4% among university graduates. Concerning occupation, the least familiar participants emerge among housewives and students, both with 11% (see Figure 9).

Figure 9 - Distribution if the answers to the question “Have you heard about the EU?” in different groups (%)

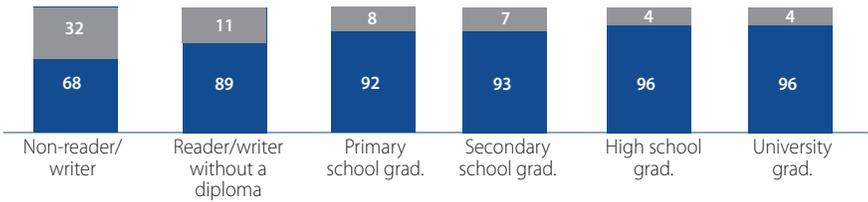
Quadruple geographic



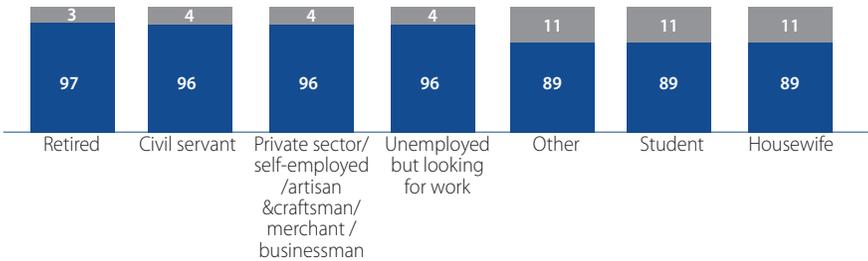
Groupings



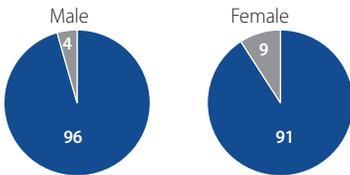
Education



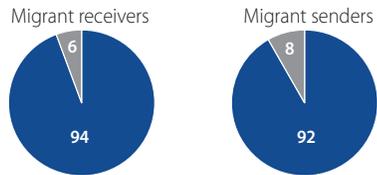
Occupation



Gender



Migration status of cities



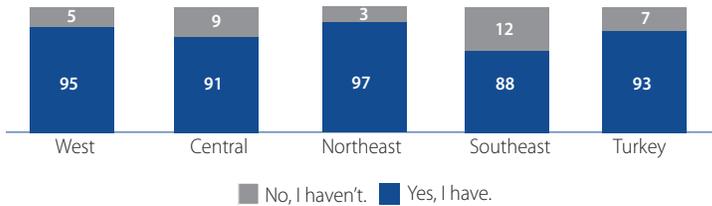
■ No, I haven't. ■ Yes, I have.

Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

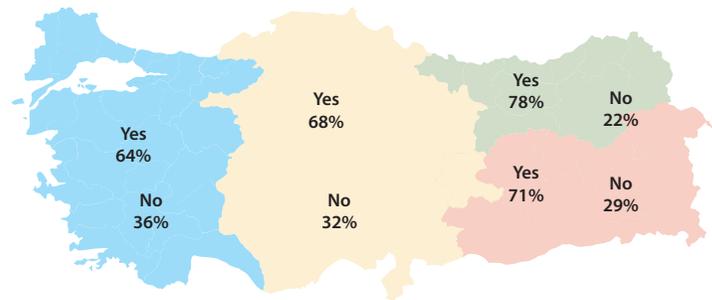
Among the 4,506 participants, 4,200 people said they have heard about the EU before. In order to be able to measure the participants' familiarity with the EU, no further questions were asked to those 306 people who haven't heard about the EU before. Among the 4,200 participants who have heard about the EU before; 67% positively answered the question "are you knowledgeable about the EU?". This shows that a 33% is not knowledgeable about the EU even though they have heard about it; thus revealing the fact that although the level of awareness about the EU is high in Turkish public, level of information about it is low. As for geographical regions, it is also interesting that in the West, 36% of the participants who have heard about the EU is not knowledgeable about it. This makes the Western region to have the highest ratio of having heard but not knowing about the EU (see Figure 10).

Figure 10 - Distribution of the answers according to quadruplet geographic groups to the questions "Have you heard about the EU?" and "Are you knowledgeable about the EU?"

Distribution of the answers to the question "Have you heard about the EU?" according to quadruplet geographic groups %



Distribution of the answers to the question "Are you knowledgeable about the EU?" according to quadruplet geographic groups



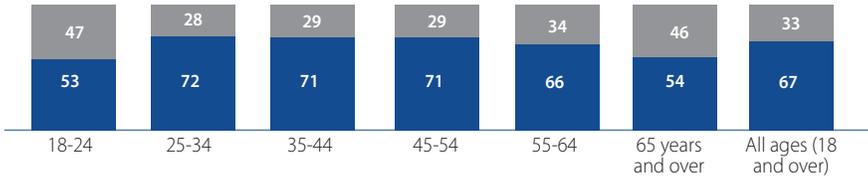
Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

The examination of different groupings shows that; women, young and old people, housewives and students have lower ratios concerning "being knowledgeable about the EU". Male participants have a lower ratio of not being knowledgeable about the EU (24%) whereas female participants have higher (43%). 47% of '18-24' age group, as well as 46% of '65 and over' age group are not knowledgeable about the EU and

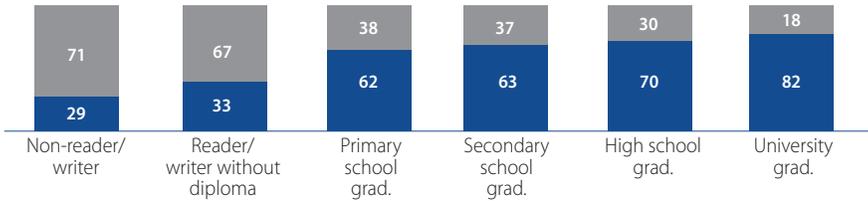
they form the highest ratios thereof. The housewives and students turn out to be the largest group in occupational sampling who are not knowledgeable about the EU with ratios of 46% and 49% respectively. On the other hand, as the education level increases, the ratio of being knowledgeable about the EU increases as well. Likewise, while 38% of the primary school graduates say they are not knowledgeable about the EU, this ratio declines to 18% in university graduates (see Figure 11).

Figure 11 - Distribution of the answers to the question “Are you knowledgeable about the EU?” in different groups (%)

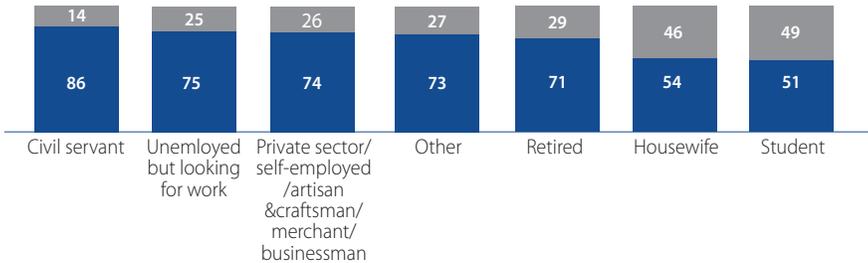
Age groupings



Education level



Occupation /employment



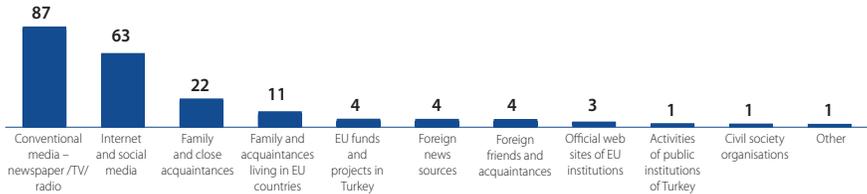
Gender



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Among the 4,506 people participated in the research, 306 haven't heard about the EU before and 1,400 of the 4200 participants who have heard about the EU, are not knowledgeable about it. Thus, the questions prepared to measure the level of knowledge and awareness concerning the EU, are only asked to the 2,800 participants who have heard and are knowledgeable about the EU^{12xii}. The fieldwork conducted with these 2,800 people sampling identifies that the most important source of information about the EU is conventional media. The by far first ranking answer to the question "what are your sources of information about the EU?" is "conventional media –newspaper/TV/radio" with a ratio of 87%. Following this, come "internet and social media" with 63% and "family and acquaintances living in EU countries" with 22%. It is interesting that the other answer choices like "foreign friends and acquaintances", "foreign news sources", "official web sites of EU institutions", "EU funds and projects in Turkey", "activities of public institutions of Turkey" and "civil society organisations" are ticked as less frequent as 4-1% (see Figure 12).

Figure 12 - Distribution of the answers* to the question "What are your sources of information about the EU?" (%)

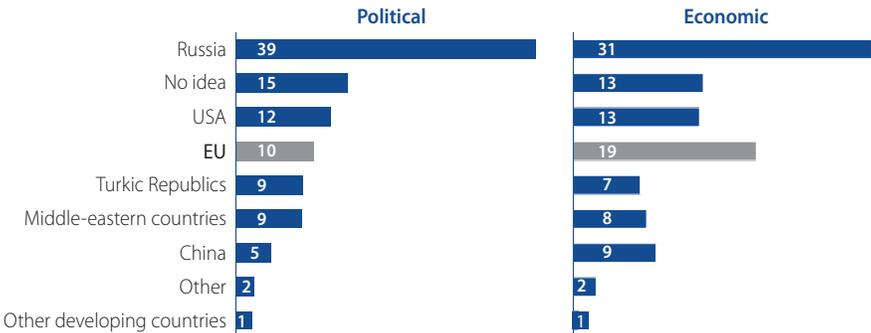


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

*the participants were allowed to make more than one choice.

The question “which countries and country groups are Turkey’s most important political and economic partners” is asked to all the participants regardless whether they have heard about the EU or not. The participants regard the EU as the third most important political partner following the Russian Federation and the USA; and second as an economic partner, after the Russian Federation (see Figure 13). When the sample group is composed of the participants who are knowledgeable about the EU; we see that EU’s share as political partner increases from 10% to 13%, and its share as economic partner from 19% to 24%. As an additional information, it is worth mentioning that all the participants be or not be knowledgeable about the EU see the Russian Federation as a very important partner with a ratio around 30%-40%.

Figure 13 - Distribution of the answers* to the questions “Which countries and country groups are the main political partners of Turkey?” and “Which countries and country groups are the main economic partners of Turkey?” (%)

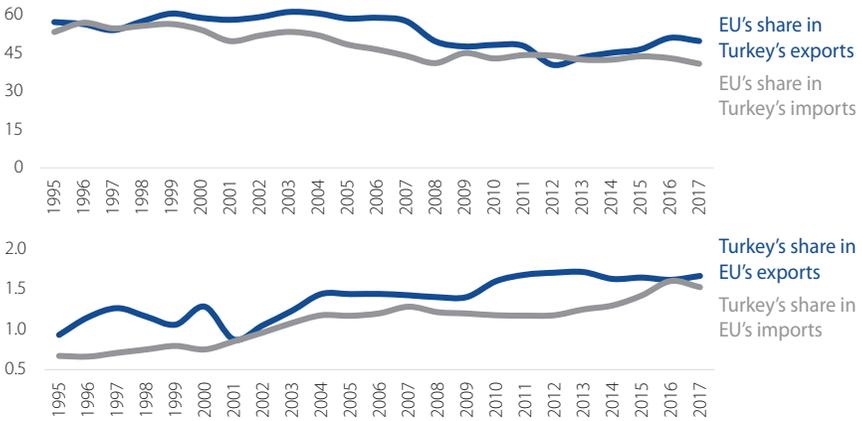


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

*the participants were allowed to make more than one choice.

The participants regard the EU countries as one of Turkey’s important economic partners. In reality, the EU is the main market for Turkey’s exports and imports. In order to regulate the trade between Turkey and the EU with regards tariffs and customs duties, negotiations on the Customs Union started in 1993 and by the Customs Union decision (Association Council Decision no.1/95) that entered into force in 1995, the trade in industrial goods between Turkey and the EU was facilitated. When we analyse the regional breakdown of Turkey’s total exports as of the end of 2017, we see that the EU’s share in Turkey’s total exports is 50% and in total imports it is 41%¹³. Besides, since 1996, nourishing upon the facilities provided by the Customs Union, Turkey has increased its market share in the EU from 0.7% to 1.5% (see Figure 14).

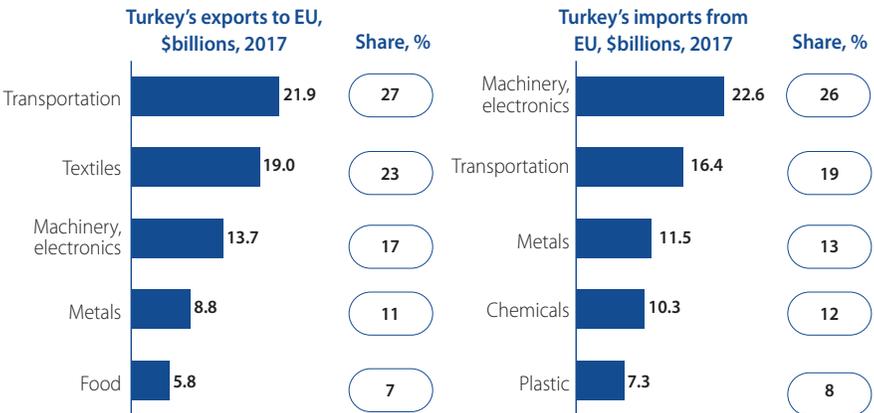
Figure 14 - The reciprocal shares of Turkey and the EU in their total trade (%), 1995-2017



Source: United Nations Comtrade, CEPII BACI, TEPAV calculations

The main areas of trade between Turkey and the EU are transportation, machinery and textiles. 2017 data shows transportation vehicles and components have the greatest portion in Turkey's exports to the EU with 27%. The textiles industry with 23%, machinery and electronics industry with 17%, metal industry with 11% and food industry with 7% follow the transportation vehicles and compounds industry. As for Turkey's imports from the EU, machinery and electronics industries lead with a share of 26%, followed by transportation vehicles and compounds with 19%, metal with 13%, chemicals with 12% and plastic industry with 8% (see Figure 15).

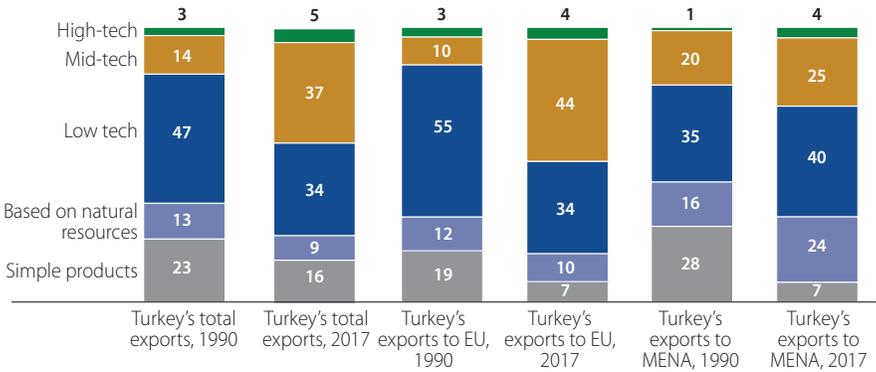
Figure 15 - Main sectors in Turkey's total imports from and exports to the EU, 2017



Source: United Nations Comtrade, CEPII BACI, TEPAV calculations

The sectorial and commodity breakdown of Turkey’s exports to the EU show that the EU is also a market for Turkey’s quality products. When we examine the breakdown of Turkey’s exports in accordance with their level of technology, we see that in 1990 the high-tech products constitute 3% of Turkey’s total exports, whereas in 2017 they constitute 5%. Same time period witnesses a considerable leap in Turkey’s mid-tech products exports to the world from 14% to 37%. Regarding Turkey’s exports to the EU in 1990-2017 period, we see that high-tech products increase from 3% to 4% and mid-tech products from 10% to 44%; thus marking the EU as Turkey’s main exports destination in mid-tech products with a market share of 61%. MENA (Middle East and North Africa) constitutes the second largest market for Turkey’s exports. It is observed that Turkey exports more low-tech products to MENA than the mid-tech products (see Figure 16). The EU’s market share in Turkey’s high-tech products is 51% whereas MENA’s is only 17%.

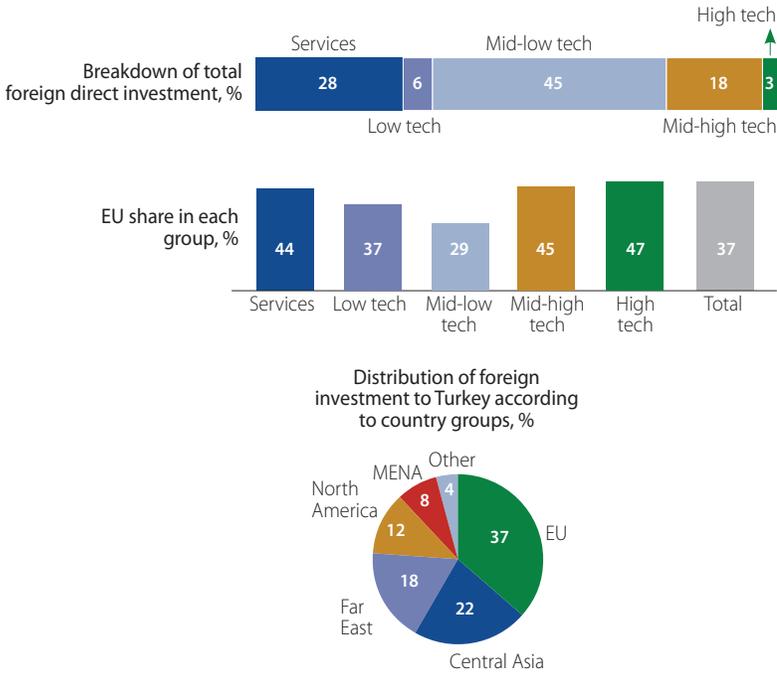
Figure 16 - Distribution of Turkey’s total exports and Turkey’s technology exports to EU and MENA markets (%), 1990 and 2017



Source: United Nations Comtrade, Lall (2000)¹⁴, TEPAV calculations

If we examine the technological breakdown of EU direct investments to Turkey, we see that EU’s share is high in quality investment. Figure 17 shows the distribution of foreign investment flow to Turkey according to levels of technology and the share of the EU in each breakdown in August 2003-2019 term. According to Figure 17, 37% of the total foreign investment to Turkey, 47% of high-tech investments and 45% of mid-high tech investments are from the EU countries. While the share of the mid-high tech products in foreign investments to Turkey is 45%, the share of EU countries in these investments is 29%. The EU’s share in low-tech products is 37%. While the services sector has 28% share in total foreign investments in Turkey, the EU’s share in this category is 44% (see Figure 17).

Figure 17 - Distribution of foreign investment to Turkey according to country groups and levels of technology, cumulative 2003-August 2019



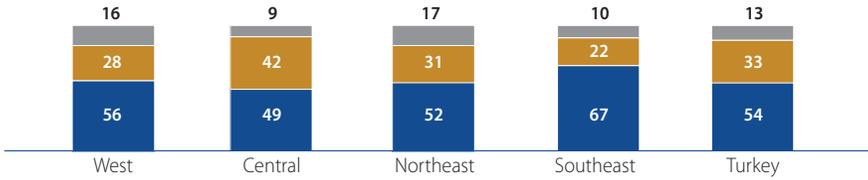
Source: FdiMarkets, TEPAV calculations

Note: The technological classification used here is the one prepared by TEPAV for FdiMarkets based on the Eurostat's OECD compatible technology classification

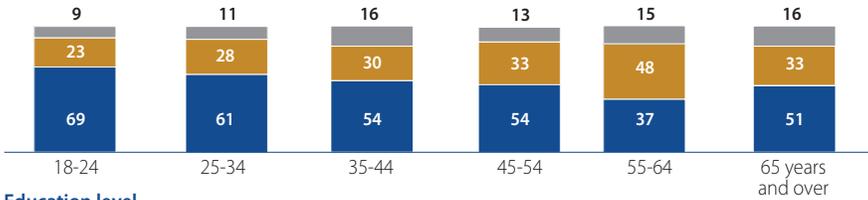
It is a fact that the EU countries are important partners for Turkey on economic and investment terms. The participants of the research seem to agree with this fact as 54% of them think Turkey needs the EU economically. 54% of the participants answers the question “does Turkey economically need the EU?” as “yes, very much”; 33% say “Turkey does not need” and 13% say “doesn’t need at all”. The Southeast region has the greatest share (67%) of the participants who think Turkey needs the EU economically, whereas the Central region’s share is the lowest (49%). Analysis of the answers to the same question asked from another perspective shows that, the perceived need for the EU in migrant receiver cities is 56% whereas it is 51% in migrant sender cities. Although one might expect that the current trade and investment connections will affect the importance of the EU in Turkey in the eyes of the public; when the export breakdown of the cities according to regions is examined (Figure 19) we see that in Southeast and Northeast regions where the perceived need for the EU is higher, the EU’s share within the export baskets is low vis-à-vis other regions. As a matter of fact, while the EU’s share is higher in the export baskets of the cities in the west of Turkey, we see that the cities in the eastern parts of Turkey export mainly to MENA countries. In addition to regional breakdown, evaluations based on gender show women (56%) have higher rates of perceived need for the EU than men (52%). Evaluation based on age on the other hand shows the young people (age 18-24) have a higher perceived need for the EU (69%). As the education level increases an increase in the perceived need for the EU is also observed. Among the primary school graduates, the share of the ones who think Turkey highly needs EU is 42%, among high school graduates it is 63% and among university graduates it is 66%. The evaluations based on employment groups show the unemployed participants (72%), followed by students (64%) and private sector employees (55%) think Turkey highly needs the EU in economic terms (see Figure 18).

Figure 18 - Distribution of the answers to the question “Does Turkey need the EU economically?” in different groups (%)

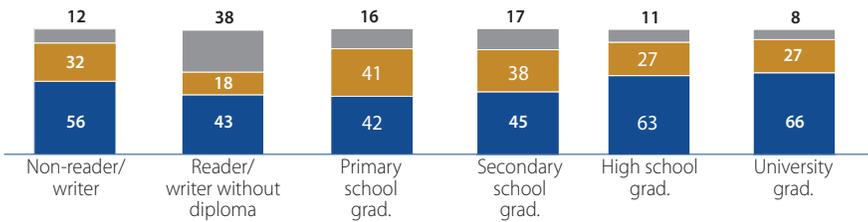
Quadruple geographic region



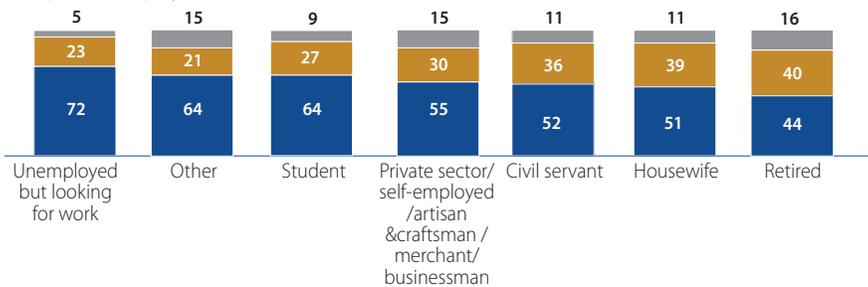
Age groupings



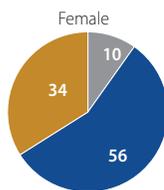
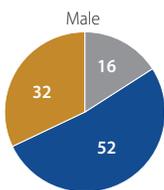
Education level



Occupation /employment statusuation level

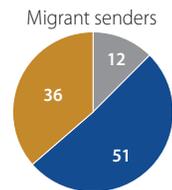
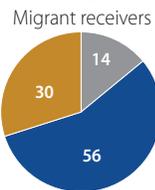


Gender



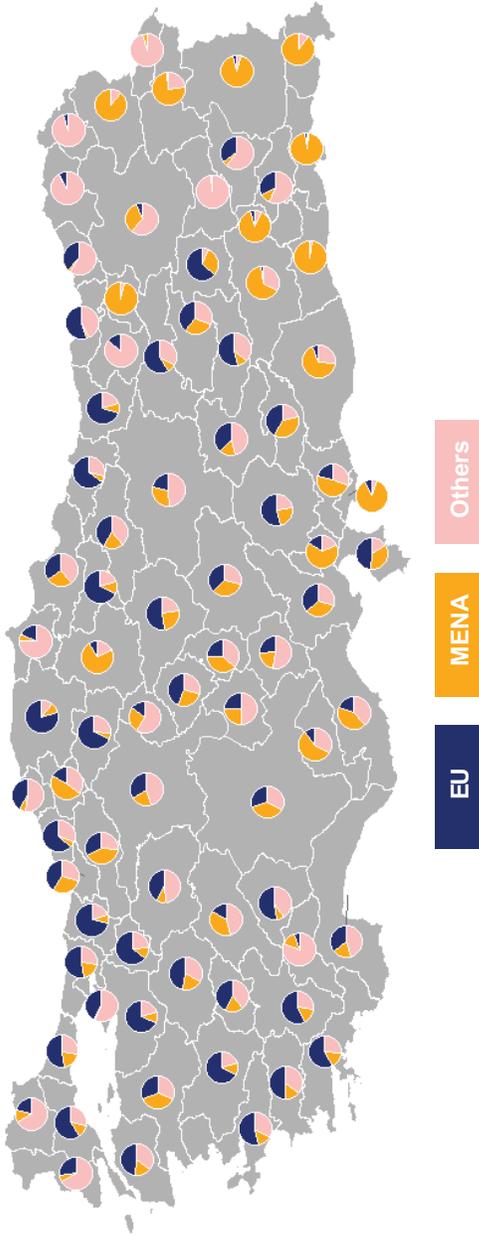
Legend:
 ■ Doesn't need at all
 ■ Doesn't need
 ■ Needs very much

Migration status of cities



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Figure 19 - Distribution of cities' exports according to continents (%), 2018



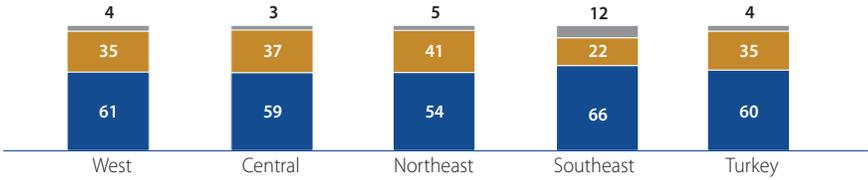
Source: TURKSTAT, TEPAV calculations

D. Support for EU Membership

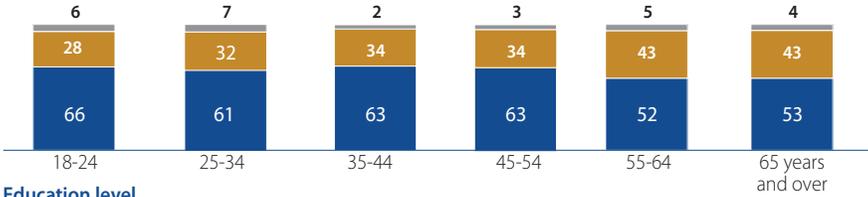
The research results reveal that 60% of the participants support Turkey's EU membership. Analysis of the distribution of the answers given to the question "do you support Turkey's EU membership?" shows that 60% says "yes I support" 35% says "no I do not" and 4% says "no idea/no answer". When the "no idea/no answer" responses are omitted, the share of the support increases from 60% to 63%. Based on quadruple geographical region distribution, Southeast has the highest support with 66%, the lowest support is seen in Northeast with 54%. From the migrant receiver and migrant sender perspective of the cities; we see that the migrant receiver cities support Turkey's EU membership is more than Turkey average with 62%, whereas this share is 59% in migrant sender cities. Gender wise, female participants' support for Turkey's EU membership (64%) is higher than the support given by male participants (57%). When we look at the distribution of EU membership support in age groups; we see that '18-24' age group shows the highest support with 66%. The level of education also plays a role; the highest support is seen in high school and university graduates with shares of 67% and 66% respectively. The analysis according to occupation reveals that the unemployed and the students support Turkey's EU membership the highest, with 67% and 66% respectively. These shares may decline as low as 60% in other occupation groups. The lowest supports are seen in private sector employees (60%) and retired people (57%). Both the civil servants and the housewives support Turkey's EU membership by 62% (see Figure 20).

Figure 20 - Distribution of the answers to the question “Do you support Turkey’s EU membership?” in different groups (%)

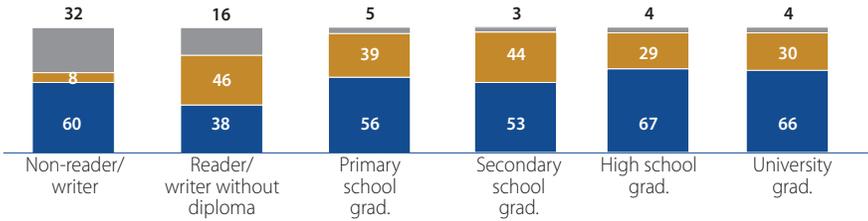
Quadruple geographic region



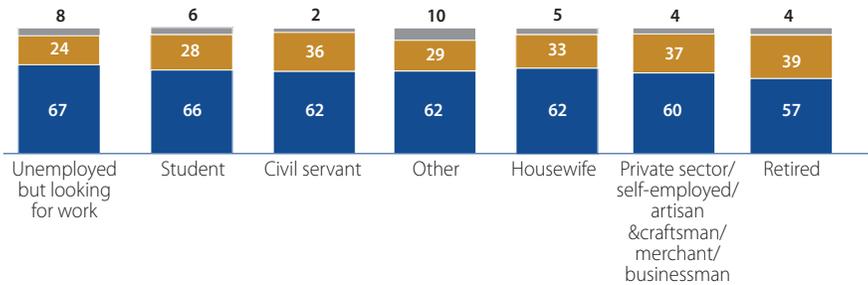
Age groupings



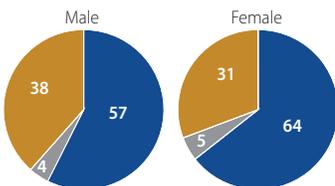
Education level



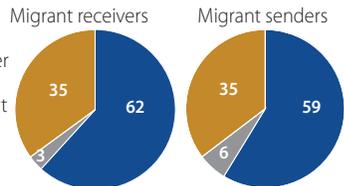
Occupation /employment status/education level



Gender



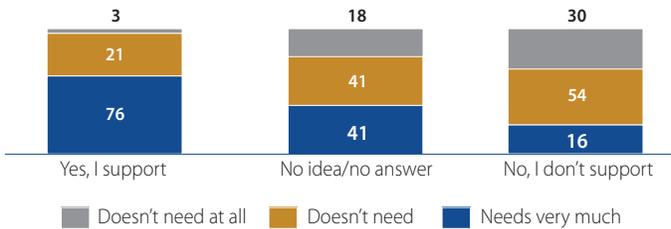
Migration status of cities



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

When we evaluate the answers given to the question “Do you support Turkey’s EU membership?” together with the answers given to the question “Does Turkey need the EU economically?” we see that 76% of the participants who support Turkey’s EU membership think “Turkey needs the EU economically”. 54% of the ones who do not support Turkey’s EU membership think “Turkey does not need the EU economically” (see Figure 21).

Figure 21 - Distribution of the answers to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “Does Turkey need the EU economically?” (%)



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and İKV, TURSTAT and TEPAV analyses

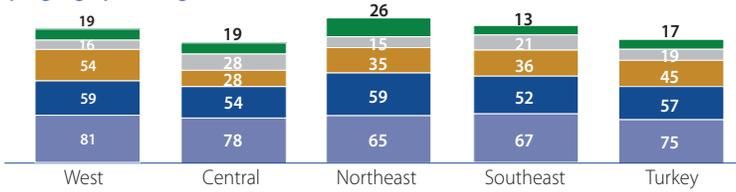
The fieldwork shows that the most important reason for the participants to support EU membership with 75% is “prosperity and economic development in our country will increase”. The answer “democracy and human rights standards will improve in our country” comes second with 57%, followed by “our country’s citizens will have the opportunity to free movement, establishment, education in Europe” with 45%. Among the other reasons of support for EU membership, 19% is for “membership will increase Turkey’s prestige and effectiveness in the world” and 17% is for “membership will contribute Turkey’s education and culture” (see Figure 22).

Evaluations based on quadruple geographical region distributions show that in each region, the most important reason for EU membership support is “prosperity and economic development”. The Southeast region has the highest level of support for EU membership (66%) and the main reason behind this support comes out as “prosperity and economic development” with 67%. The same reason manifests itself with a share of 81% in the West, 78% in the Centre and 65% in the Northeast region. As for the migrant receiver and migrant sender status of the cities, it is observed that the receiver cities support membership for prosperity and economic development with 77% and sender cities with 74%. Gender distribution reveals that welfare and economic development as a reason for membership

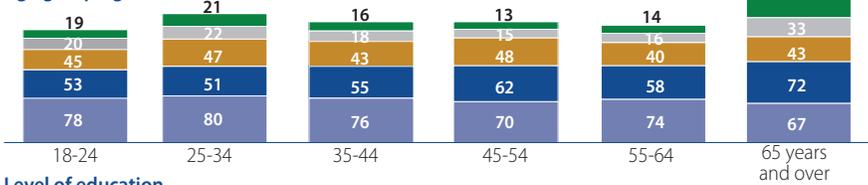
support is number one with 75% for the female participants and 76% for the male participants. As for age groupings; we see that the '65 and over' age group supports EU membership mostly for the reason of democracy and human rights improvement with 72%. For all the other age groups the main reason for the support of EU membership is prosperity and economic development. The analysis of the answers to the question of "Why do you support Turkey's EU membership?" from an education level perspective shows that the answer "prosperity and economic development in our country will increase" receives 78% of the answers of secondary and high school graduates, and becomes the most ticked answer choice. The same answer receives 74% from the university graduates, 72% from the primary school graduates, 69% from the reader/writers without a diploma, and 57% from the non-reader/writer participants. Among the reasons for membership support of the non-reader/writer group, improvement in the democracy and human rights standards prevails with 77%. The distribution according to occupation areas shows that prosperity and economic development form the number one reason with 78% in students, whereas in retired people and civil servants it forms the least ticked reason with 70% (see Figure 22).

Figure 22 - Distribution of the answers* to the question “Why do you support Turkey’s EU membership?” in different groups (%)

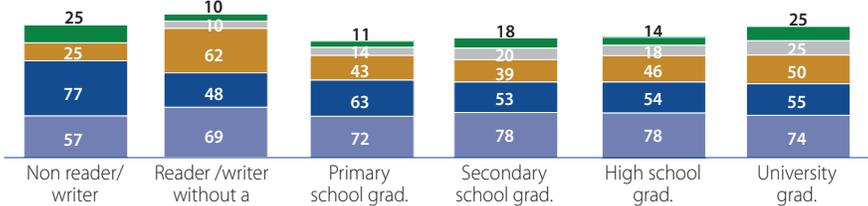
Quadruple geographical region



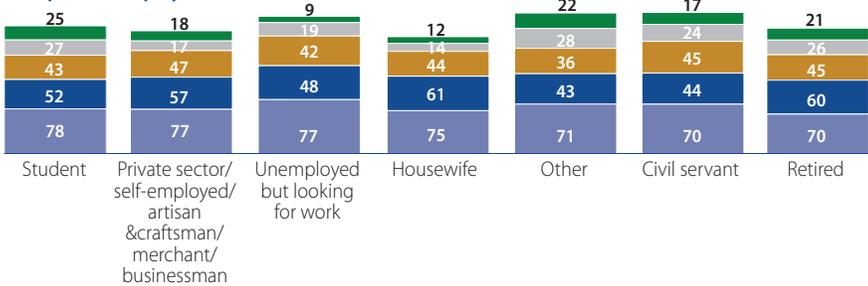
Age groupings



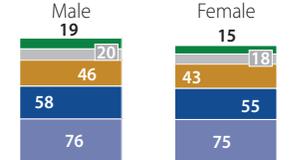
Level of education



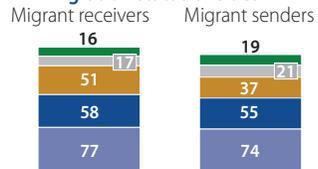
Occupation /employment status



Gender



Migration status of cities



- Other
- Contribute Turkey's education and culture
- Increase Turkey's prestige and effectiveness in the world
- The opportunity to free movement, establishment, education in Europe
- Democracy and human rights standards will improve
- Prosperity and economic development

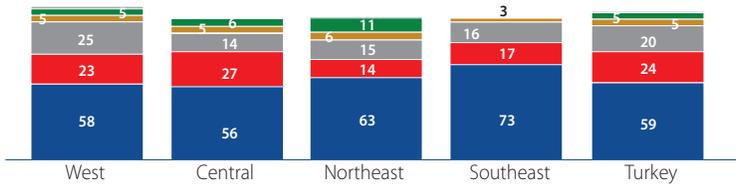
Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

*the participants were allowed to make more than one choice.

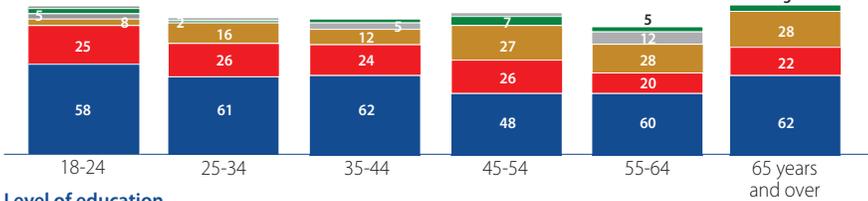
The results of the public opinion research show that the participants who do not support Turkey's EU membership think that membership will undermine Turkish culture and identity. When we ask the participant who do not support Turkey's EU membership: "Why don't you support Turkish EU membership?" the concern that the membership will undermine Turkish culture and identity ranks first with a share of 59%. This is followed by "the EU has no future" with 24%, "EU membership will weaken Turkey's foreign relations" with 20% and, "it would damage the national sovereignty and independence of our country" and "our economy will be damaged" with 5%. The quadruple geographic region based analysis shows that the concern for "the membership will undermine Turkish culture and identity" receives 73% of the answers in Southeast region, whereas it only receives 56% from the Central region. The same answer receives 66% in migrant sender cities and 53% in migrant receiver cities. The same answer in gender groups receives 60% from male participant sand 57% from female participants. Besides, female participants' second highest rated answer to the question "why don't you support Turkey's EU membership?" is that "it will damage the national sovereignty and independence of our country" with 28%; in male participants the second highest answer comes as "the EU has no future" with 22%. The age grouping analysis shows that the concern that the membership "will damage the national sovereignty and independence of our country" is high with a share of 62% in age groups of '35-44' years and '65 and over'. When we examine the answers according to education levels; we see that the non-reader/writer group 100% thinks that the membership will "damage the national sovereignty and independence of the country". The same concern manifests itself as 63% in secondary school graduates, 61% in university graduates, 58% in primary school graduates and 53% in high school graduates. The idea that the membership "will damage the national sovereignty and independence of the country" is the main concern for the reader/writer without a diploma (54%). As for the occupation distribution; the unemployed do not support Turkey's EU membership as they think with a 72% that membership "will damage the national sovereignty and independence of the country". The same answer is given by 64% of the housewives, 58% of the private sector employees, 57% of the retired people, 55% of the students and 48% of the civil servants (see Figure 23).

Figure 23 - Distribution of the answers* to the question “Why don’t you support Turkey’s EU membership?” in different groups (%)

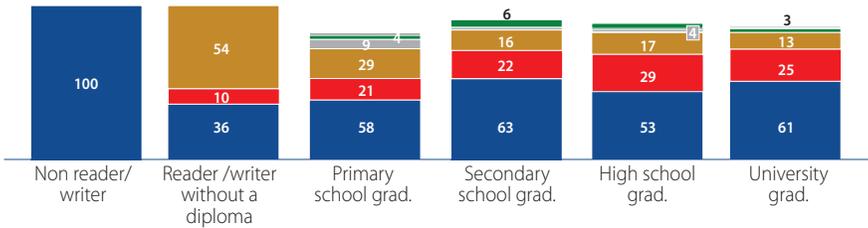
Quadruple geographical region



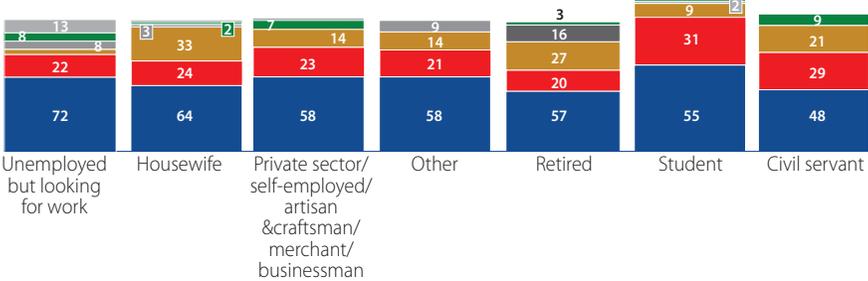
Age groupings



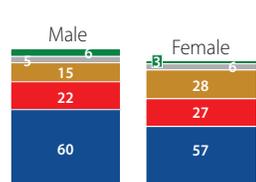
Level of education



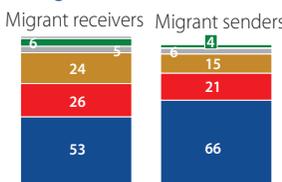
Occupation /employment status



Gender



Migration status of cities



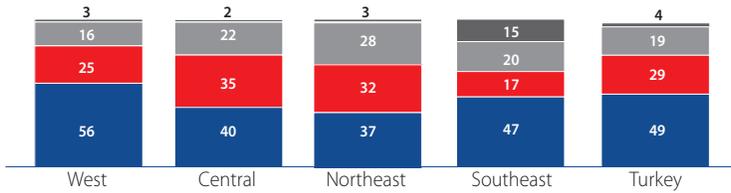
- Other
- Damage the economy
- Weaken Turkey's foreign relations
- Damage the national sovereignty and independence
- EU has no future
- Undermine Turkish culture and identity

Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

When the answers to the question “In your opinion, which is the most appropriate relation between Turkey and the EU?” are evaluated, it is seen that according to 49% of the participants, the most appropriate sort of relationship between Turkey and the EU is “full membership”, followed by 29% “continuation of the Customs Union” and 19% “developing a privileged partnership”. The examination of the results given by the participants according to the quadruple geographic region based analysis shows that full membership receives most of the answers in the West (56%), followed by Southeast (47%) and the Centre region (40%). The least support for full membership is recorded in the Northeast (37%). When the answers to the same question in the migrant receiver and sender cities are examined, the receiver cities’ support was recorded as 53% and the sender cities’ as 44%. Gender analysis show that female participants think with a ratio of 56% that the most suitable relation between Turkey and the EU is full membership, male participants has a ratio of 44% in this respect. Both genders think that the second best relation between Turkey and the EU will be the continuation of the Customs Union. This answer option finds more support among women and in cities receiving migration. Among the participants who do not support Turkey’s EU membership, the most suitable relation is said to be “the continuation of the Customs Union”. The age grouping distribution shows that; full membership receives most answers from ‘18-24’ age group with 54% and ‘25-34’ age group with 52%. The ‘55-64’ age group supports full membership with a ratio of 39% and this group is the one with the highest support for the continuation of the Customs Union with 37%. The education level grouping shows that the non-reader/writer group has the highest support for full membership with 61%. The survey results show that the university graduates support full membership with 53%, high school graduates with 52%, secondary school graduates with 45% and primary school graduates with 44%. The reader/writer without a diploma group thinks with a 42% that the best relation between Turkey and the EU will be “the continuation of the Customs Union”. On the other hand, the unemployed and the housewives strike to be the two groups that highly support Turkey’s EU full membership with ratios of 58% and 57% respectively (see Figure 24).

Figure 24 - Distribution of the answers to the question “In your opinion, which is the most appropriate relation between Turkey and the EU?” in different groups (%)

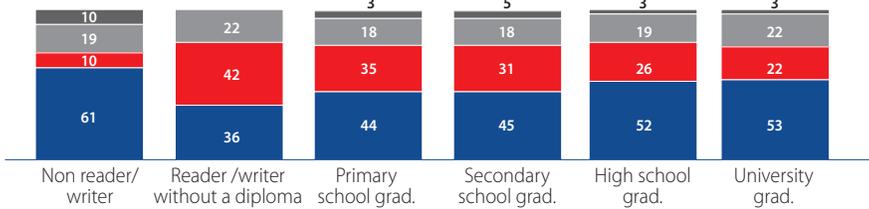
Quadruple geographical region



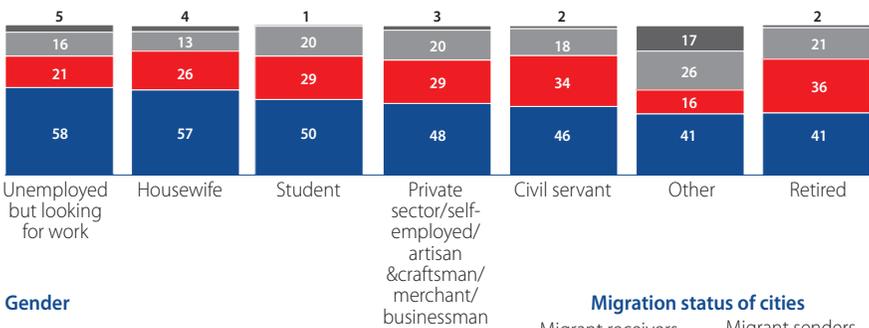
Age groupings



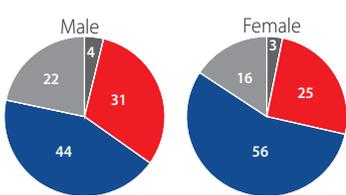
Level of education



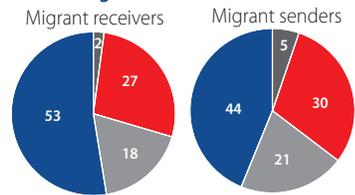
Occupation /employment status



Gender



Migration status of cities

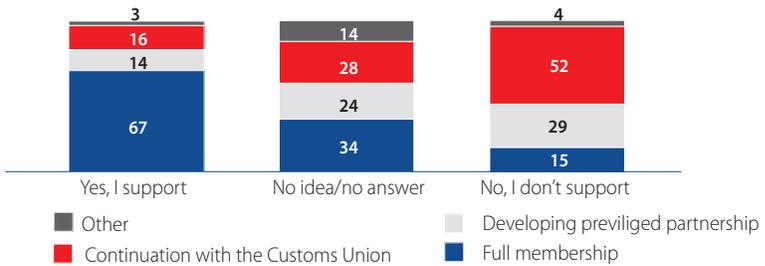


- Other
- Developing a privileged partnership
- Continuation of the Customs Union
- Full membership

Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

When the distribution of the answers given to the question “Do you support Turkey’s EU membership?” is analysed in accordance with the answers given to the question “In your opinion, which is the most appropriate relation between Turkey and the EU, it is seen that 67% of the participants who support Turkey’s EU membership also regards full membership to be the most suitable relation between Turkey and the EU. This ratio is recorded to be 15% in the participants who do not support EU membership and 34% in the participants who answered the first question as “no idea/no answer”. It is also observed that 52% of the participants who do not support Turkey’s EU membership think the continuation of the Customs Union is the most suitable type of relationship between Turkey and the EU (see Figure 25).

Figure 25 - Distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “In your opinion, which is the most appropriate relation between Turkey and the EU?” (%)



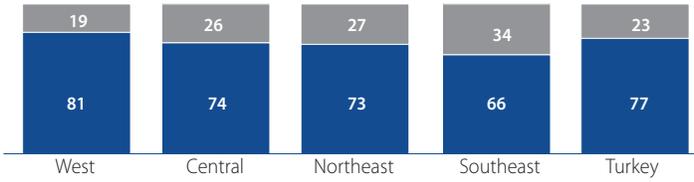
Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

E. Belief in EU Membership

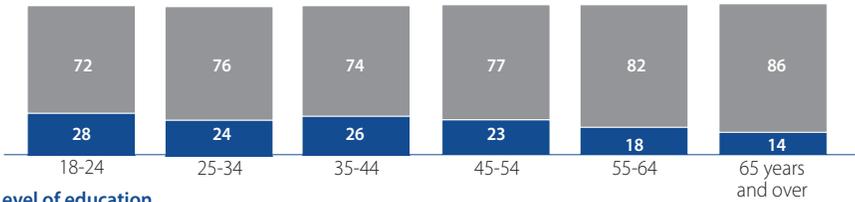
The participants of the research are asked the question of “Do you believe Turkey will become a member of the EU?” and 23% of them say “yes I believe” whereas 77% say “no I do not”. When we examine the answers given to the question of “Do you believe Turkey will become a member of the EU?”; we see that the ratio of the ones that believe is 23% in 2019. When a similar question was asked in the surveys of previous years; we see that this ratio was 30% in 2015, 36% in 2016 and 31% in 2017. All these numbers are higher than the current survey¹⁵. In 2019, the examination of the results given by the participants according to the quadruple geographic region based analysis shows that the Southeast region has the highest belief rate in the country’s EU membership with 34%, Northeast follows with 27%, and then comes the Centre region with 26%. On the other hand, the West region strikes to have the lowest belief in Turkey’s EU membership perspective with a ratio of 19%. From gender point of view; female participants (29%) believe in Turkey’s EU membership more than male participants (19%). The results of the fieldwork show that as age increases the belief in Turkey’s EU membership decreases. Hence, the age group that mostly believes in Turkey’s EU membership is ‘18-24’ with 28% whereas in ‘65 and over’ age group, the ratio is 14%. Level of education also affects the degree of belief. The university graduates are the ones who believe the least in EU membership (19%), however the non-reader/writer group believes the most with 47%. As for occupational distribution; the unemployed form the group that believes that Turkey will become an EU member the most with 34%, followed by housewives with 32%, private sector employees and students both with 21%. The groups who believe the least are; the retired people with 13% and civil servants with 14% (see Figure 26). When we examine the distribution of the answers given to the question “Do you support Turkey’s EU membership?” in accordance with the answers given to the question “Do you believe that Turkey will become an EU member?”, we see that 94% of the participants who say “no, I don’t” to the first question also believe that Turkey will not become an EU member. The belief in Turkey’s EU membership is recorded as 33% among participants who support Turkey’s EU membership (see Figure 27).

Figure 26 – Distribution of the answers to the question “Do you believe that Turkey will become an EU member?” in different groups (%)

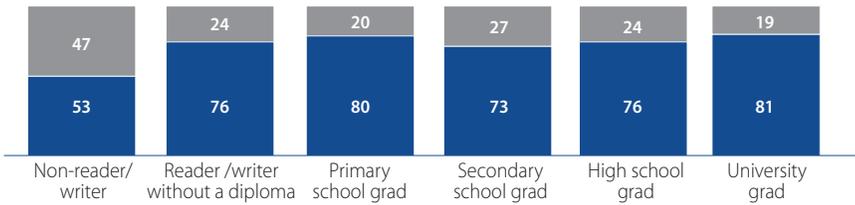
Quadruple geographical region



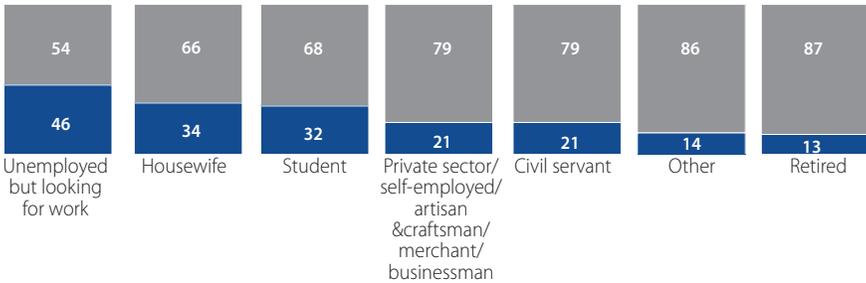
Age groupings



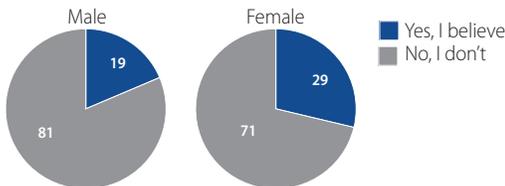
Level of education



Occupation /employment status

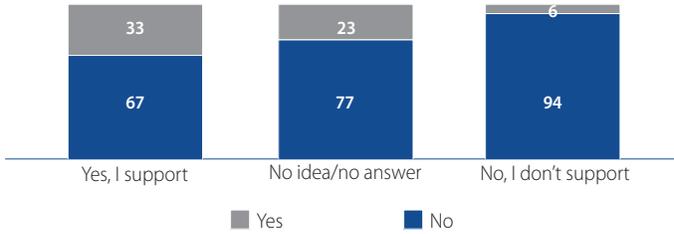


Gender



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Figure 27 - Distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “Do you believe that Turkey will become an EU member?” (%)

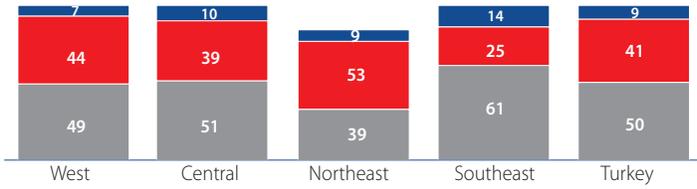


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

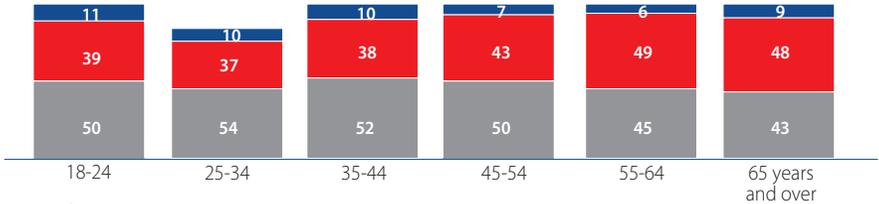
The evaluation of the results of the public opinion research shows that the level of belief in Turkey's EU membership does not change. As an answer to the question "Does your belief in Turkey's eventual EU membership increase or decrease?" 50% of the participants say "it does not change" 41% say "decreases" and 9% say "increases". The quadruple geographic region analysis reveals that the region where the belief in membership is increased mostly is the Southeast (14%) and the least is West (7%). Gender analysis shows that the female participants' belief in membership increases (10%) more than the male participants' (7%). When it comes to age groupings; the group in which the belief most increases is '18-24' with 11%; whereas it is observed that as age increases the share of belief increase becomes as low as 6%. Hence, the age groups in which the belief in membership decreases most are 55-64 (49%) and '65 and over' (48%). As for level of education; the high school and university graduates are the two groups whose belief increases less (8% each). The evaluation according occupation shows that the housewives (13%) and the unemployed (11%) are the two groups where the belief increases the most; whereas the retired people are recorded whose belief decreases the most (52%) (see Figure 28).

Figure 28 - Distribution of the answers to the question “Does your belief in Turkey’s eventual EU membership increase or decrease?” in different groups (%)

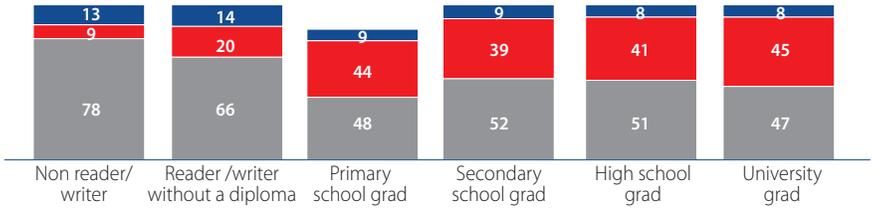
Quadruple geographical region



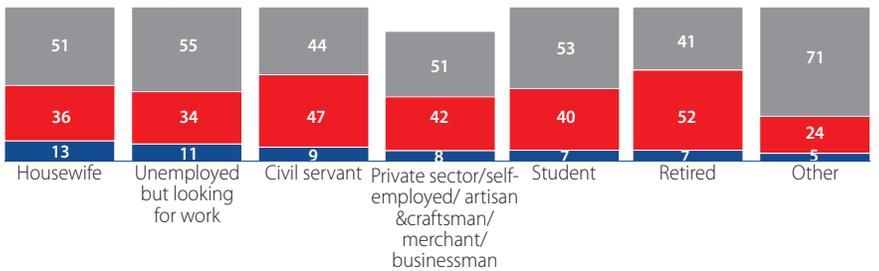
Age groupings



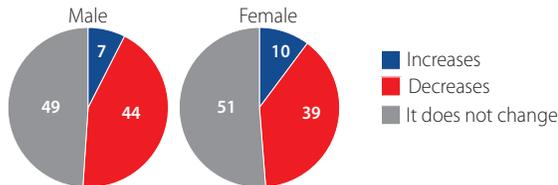
Level of education



Occupation /employment status



Gender

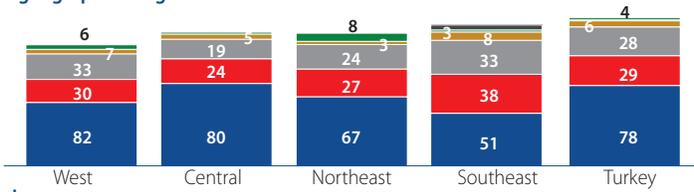


Source: Research on the European Union Support and European Perception in Turkish Public Opinion 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

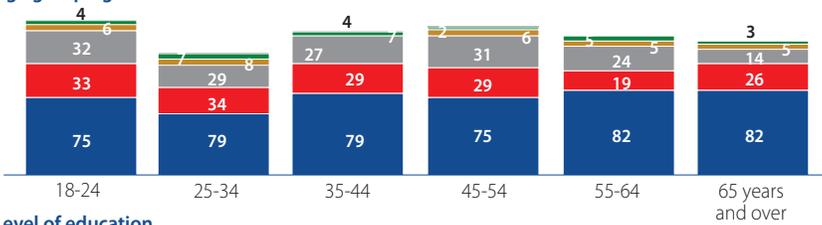
The results of the public opinion research show that “prejudices based upon religious and cultural differences” receive 78% of the answers as to be the main obstacle before Turkey’s EU membership. Thus the above answer forms the most given one to the question “In your opinion, which factors constitute the main obstacle to Turkey’s EU membership?”. The second most given answer is “economic development level of Turkey” with 29%, followed by “Turkey’s performance in the area of democracy and human rights” with 28%. As against these, 6% of the participants think “free movement of Turkish citizens” is the main obstacle to Turkey’s EU membership and 4% think it is the “Cyprus issue”. When analysed according to quadruple geographical region system, a quite high 82% of the Western region thinks “prejudices based upon religious and cultural differences” is the main obstacle. This answer receives 80% in Central region, 67% in Northeast and 51% in Southeast. Evaluations based on the gender distribution show that “prejudices based upon religious and cultural differences” makes up for the 80% of the answers of male participants and 77% of the answers of female participants. As for age groupings; the ‘55-64’ group and ‘65 and over’ think the main obstacle before Turkey’s EU membership is “prejudices based upon religious and cultural differences” both with 82%. The second obstacle according to ‘18-44’ group is “Turkey’s level of economic development” and according to ‘45-64’ age group it is “Turkey’s performance in the area of democracy and human rights”. All the participants in all education levels think the main obstacle is the “prejudices based upon religious and cultural differences”. The university graduates regard the second most important reason to be “Turkey’s performance in the area of democracy and human rights” with 32%. When we examine distribution of the answers according to the areas of occupation, we see that, private sector employees and the retired people consider “prejudices based upon religious and cultural differences” as the main obstacle with a ratio of 81% each (see Figure 29). Furthermore, 75% of the participants who answered the question “do you support Turkey’s EU membership” as “yes, I do” think the main obstacle before Turkey’s EU membership is the “prejudices based upon religious and cultural differences”, whereas this ratio is recorded as 87% among the ones who do not support Turkey’s EU membership (see Figure 30).

Figure 29 - Distribution of the answers* in different groups to the question “In your opinion, which factors constitute the main obstacle to Turkey’s EU membership?” (%)

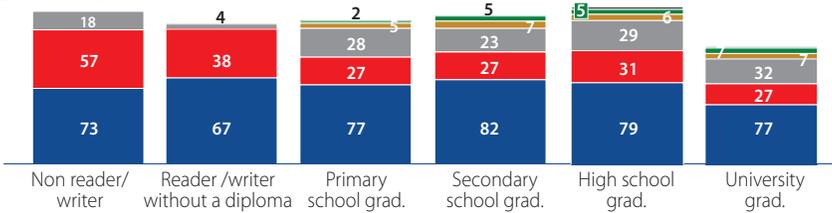
Quadruple geographical region



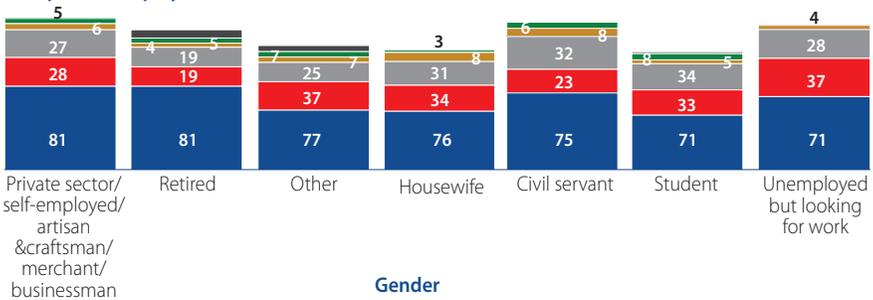
Age groupings



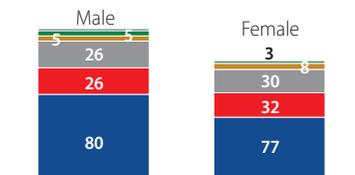
Level of education



Occupation /employment status



Gender

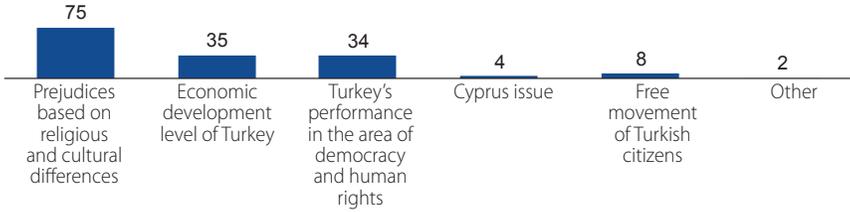


Other
 Free movement of Turkish citizens
 Economic development level of Turkey
 Cyprus issue
 Turkey's performance in the area of democracy and human rights
 Prejudices based upon religious and cultural differences

Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Figure 30 - Distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers* given to the question “In your opinion, which factors constitute the main obstacle to Turkey’s EU membership?” (%)

Participants who support EU membership



Participants who do not support EU membership



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

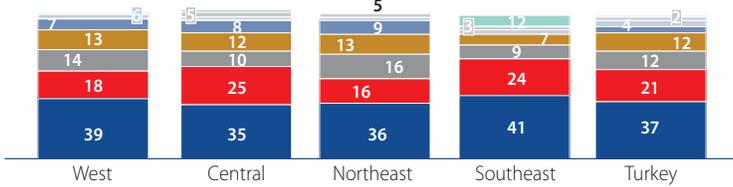
*the participants were allowed to make more than one choice.

F. Meaning of the EU and EU Membership for Turkey

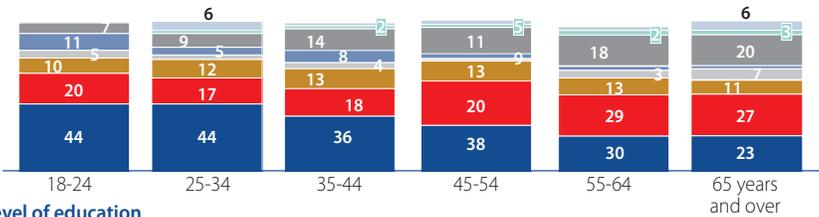
The participants of the public opinion research reckon the EU reflects “prosperity and economic development”. While 37% of the participants answer the question “What does the EU mean to you?” as “prosperity and economic development”, 21% answer as “democracy and freedom”, 12% as “decline and fall” and 12% as “free movement and the abolishment of borders”. Apart from these, 7% of the participants regard the EU as “culture and civilization” whereas 5% regard as “domination and oppression”. According to quadruple geographic region range, in Southeast region, “prosperity and economic development” forms the most given answer with 41%. The Southeast is followed by West with 39%, Northeast with 36% and Central region with 35%. The regions where the answer “democracy and human rights” prevails are Centre (25%) and Southeast (24%). While the statement “prosperity and economic development” receives 40% of the answers of the participants in migrant receiver cities, in migrant sender cities the same statement receives 35% of the answers. Gender distribution is as follows; both female and male participants consider “prosperity and economic development” as the main benefit; with 41% in female participants and 35% in male; in both genders “democracy and freedom” comes second; for male participants “decline and fall” comes third with 14% whereas in female participants the third is “free movement and the abolishment of borders” with 13%. When the answers are examined according to age groupings; we see that the EU means “prosperity and economic growth” for ‘18-64’ age group, whereas for ‘65 and over’ it means “democracy and freedom” with a ratio of 27%. As the age increases, an increase in the share of “democracy and human rights” is observed up to 29%. As to level of education grouping; EU means “prosperity and economic development” with 48% for the reader/writer without a diploma; followed by high school graduates and non-reader/writer with 41% each, university graduates with 40%, primary school graduates with 35% and secondary school graduates with 33%. While “democracy and freedom” ranks second for most of the participants; it is “common standards and harmonization” with 16% for the ‘non-reader/writer group’ and as for the ‘reader/writer without a diploma group’ it is “decline and fall” with 22%. The evaluation based on occupation shows that “prosperity and economic development” is the main meaning of the EU for students with a share of 46%; this answer receives 43% of the answers of the unemployed, 41% of the housewives, 38% of the private sector employees and 35% of the answers of the civil servants. The share of the retired people who think the

Figure 31 - Distribution of the answers to the question “What does the EU mean to you?” in different groups (%)

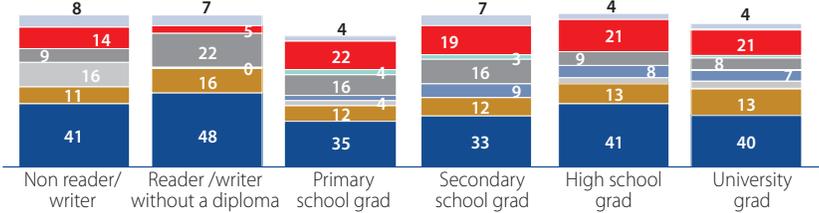
Quadruple geographical region



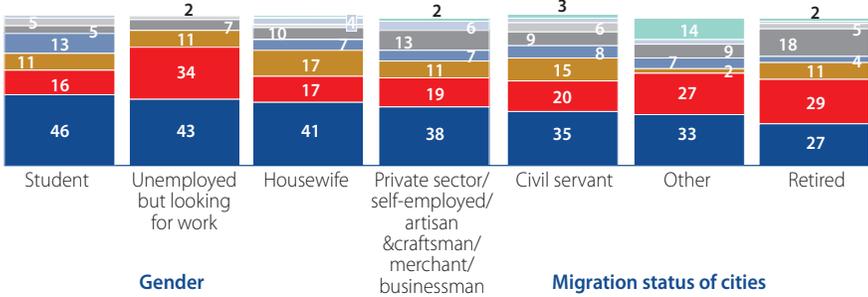
Age groupings



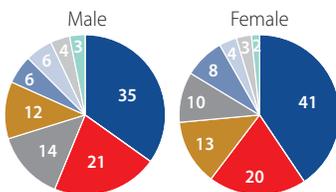
Level of education



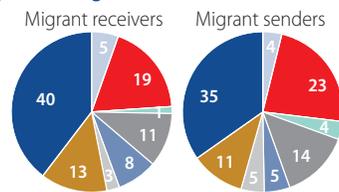
Occupation /employment status



Gender



Migration status of cities



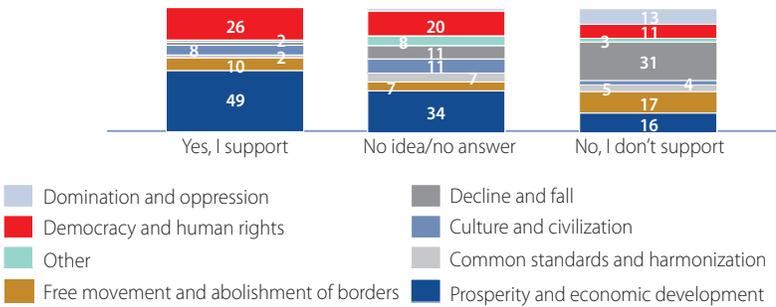
- Domination and oppression
- Decline and fall
- Free movement and the abolishment of borders
- Democracy and freedom
- Culture and civilization
- Prosperity and economic development
- Common standards and harmonization
- Other

Source: Research on the European Union Support and European Perception in Turkish Public Opinion 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

*the participants were allowed to make more than one choice.

EU means “democracy and human rights” is 29% and who think it means “prosperity and economic development” is 27%. It is also interesting to note that the answer “democracy and human rights” is the number one choice of the unemployed group with 34% (see Figure 31). We see that the participants who answer the question “Do you support Turkey’s EU membership?” as “yes, I do”, also answer the question “What does the EU mean to you?” as “prosperity and economic development” with a ratio of 49%; whereas the ones who do not support Turkey’s EU membership answer the second question as “decline and fall” with 31% (see Figure 32).

Figure 32 - Distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “What does the EU mean to you?” (%)

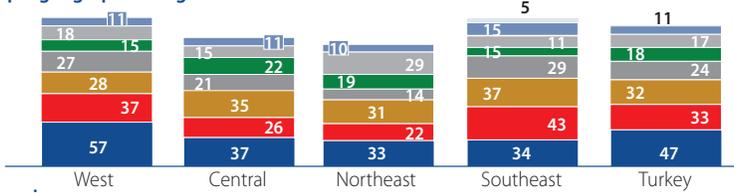


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

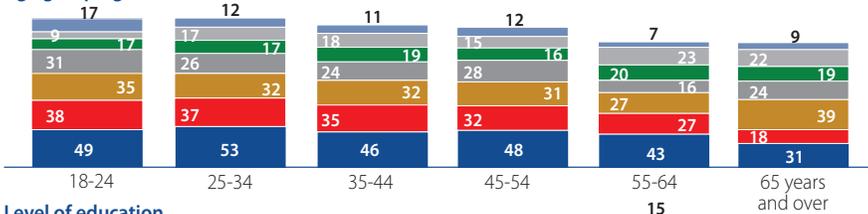
The public opinion research shows that the main contribution that the EU membership will bring is considered to be “free movement”. As for the question “What could be the contributions of the EU membership to Turkey?” 47% of the participants say free movement, 33% say increased employment opportunities, 32% say opportunity to benefit from EU budget and funds, 24% say improvement in democratic standards, 18% say participation in EU institutions and decision making process and 11% say increase in international power and reputation. 17% of the participants think EU membership will not contribute to Turkey in anyway. The quadruple geographic region distribution shows that the highest expectation in the Western region from membership is “free movement” (57%) whereas it is “new employment opportunities” (43%) in the Southeast region. The answer that the EU membership “will not contribute to Turkey in anyway” receives its highest share in Southeast with 29%. Gender distribution shows; “free movement” receives 50% of female participants’ answers and 45% of male participants’ answers. The sequence continues with “new employment opportunities” (35%) in female participants whereas in male participants a different answer “opportunity to benefit from EU budget and funds” receives the same ratio (35%) and rank. According to age grouping; the most important expectation of ‘18-64’ group from EU membership is “free movement”, and for ‘65 and over’ the most important contribution will be “opportunity to benefit from EU budget and funds” with 39%. Level of education is another grouping in the survey and it shows that the participants with a diploma (of any level) think the most important contribution of the EU membership will be “free movement”, whereas the ‘reader/writer without a diploma’ group mostly thinks (41%) that membership will not contribute in Turkey at all. As for area of occupation; civil servants constitute the main group that choose “free movement” (54%) as main contribution, followed by housewives and private sector employees (50% each), students (47%), the retired (39%) and the unemployed (37%) (see Figure 33).

Figure 33 - Distribution of the answers* to the question “What could be the contributions of the EU membership to Turkey?” in different groups

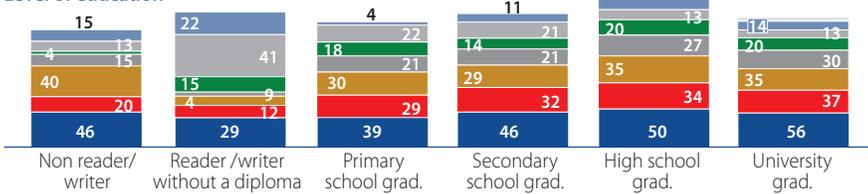
Quadruple geographical region



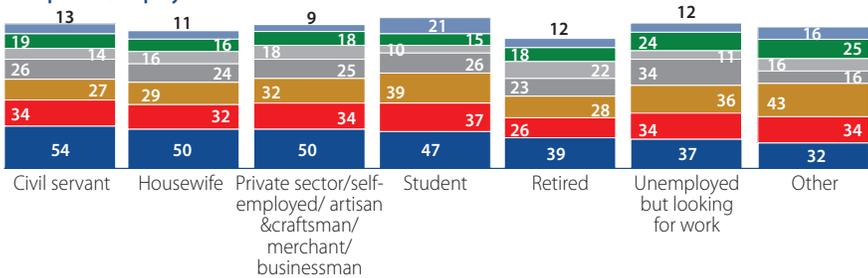
Age groupings



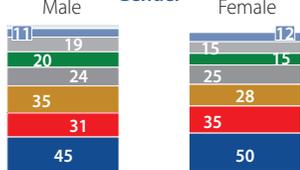
Level of education



Occupation /employment status



Gender



- Other
- Increase in international power and reputation
- EU membership will not contribute to Turkey
- Participation in EU institutions and decision making process
- Improvement in democratic standards
- Opportunity to benefit from EU budget and funds
- Increased employment opportunities
- Free movement

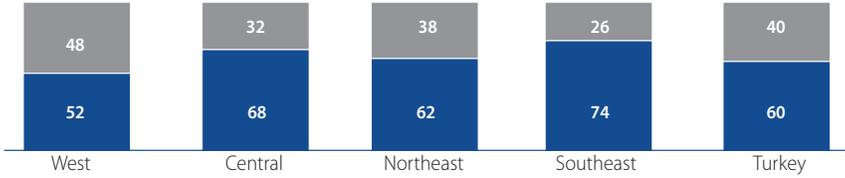
Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

G. Turkey's EU Membership Performance

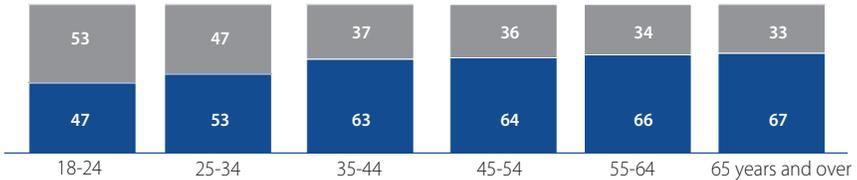
60% of the participants think Turkey has the administrative and institutional capacity and qualified human resources needed for EU membership. Distribution of the answers given to the question "Do you believe that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership?" shows that the share of the answer "yes" is 60% whereas the share of the answer "no" is 40%. The quadruple geographic regional distribution shows that the Southeast has the strongest belief (74%) that Turkey has the necessary capacity, whereas the Western region has the weakest belief (52%), lower than Turkey average. We also see that the level of belief is higher in migrant sender cities (65%) compared to the migrant receiver cities (55%). When the answers are examined from a gender point of view; we see that the belief in Turkey's capacity is the same (60%) in both genders. Age grouping analysis show that; while '65 and over' group believes that Turkey has the necessary capacity and qualified human resources with a ratio of 67%, the '18-24' group believes that Turkey has the required capacity with 47% (the least ratio in age grouping). It is observed that as the age increases the belief in Turkey's capacity also increases, so much so that the shares climb up to 67%. When the education levels are taken into consideration; it is seen that 'the reader/writer without a diploma' group has the highest belief in Turkey's capacity with 72%; followed by primary school graduates (66%), the non-reader/writer (63%), secondary school graduates (62%), university graduates (56%) and high school graduates (55%). As for area of occupation; civil servants believe that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership with a very high percentage (73%). Students form the group with the least belief in this area (42%) (see Figure 34). When the answers given to the question "Do you support Turkey's EU membership?" are evaluated according to the answers given to the question "Do you believe that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership?"; we see that the ratio of belief in Turkey's capacity is higher (64%) in the participants who do not support Turkey's EU membership compared to the participants belief in Turkey's capacity (57%) in the participants who support Turkey's membership (see Figure 35).

Figure 34 - Distribution of the answers to the question “Do you believe that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership?” in different groups (%)

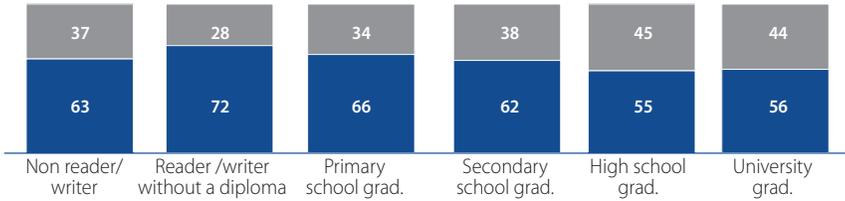
Quadruple geographical region



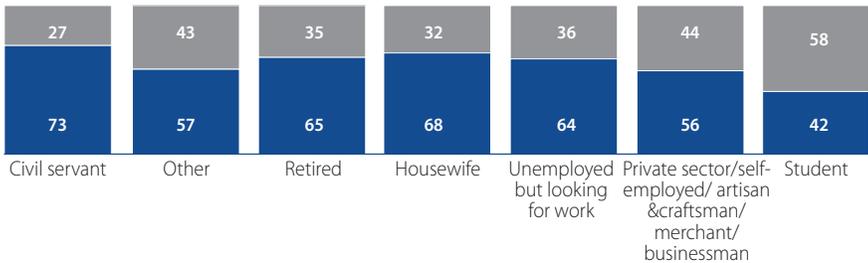
Age groupings



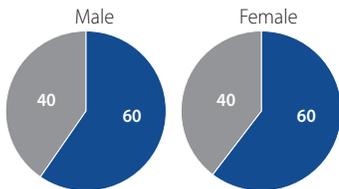
Level of education



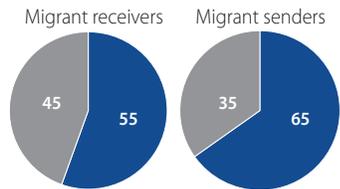
Occupation / employment status



Gender



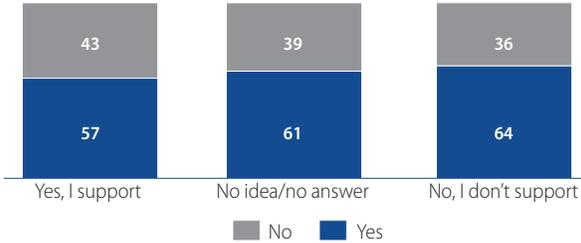
Migration status of cities



■ No ■ Yes

Source: Research on the European Union Support and European Perception in Turkish Public Opinion 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Figure 35 - Distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “Do you believe that Turkey has the necessary administrative and institutional capacity and qualified human resources required for EU membership?” (%)

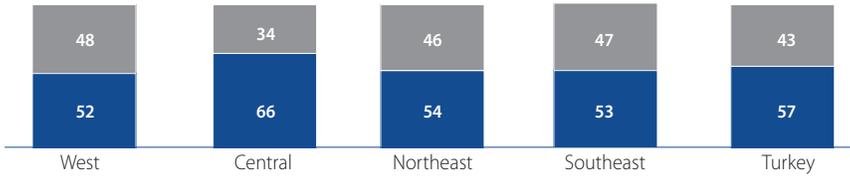


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

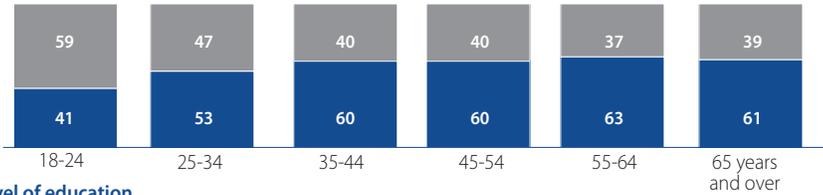
According to the results obtained from the public opinion research, 57% of the participants believe that Turkey has fulfilled the necessary obligations to become an EU member. When we examine the distribution of the answers given to the question “Do you believe that Turkey fulfils its obligations required for EU membership?” we see that the ratio of the affirmative answers is 57% whereas the ratio of the negative answers is 43%. The quadruple geographical region distribution shows that; the Central region has the highest ratio of belief with 66%, followed by Northeast with 54%, Southeast with 53% and Western region with 52%. The analysis of the answers according to migrant receiver and migrant sender cities, shows that the receiver cities say “yes” to the above mentioned question with a ratio of 55% and the sender cities say “yes” with a ratio of 59%. Gender evaluation reveals that both female and male participants equally believe (57%) that Turkey fulfils its obligations required for EU membership. The age groups analyses show that the belief that “Turkey fulfils its obligations required for EU membership” increases in parallel with the age increase. While the age group ‘18-24’ agree with this statement with a 41% ratio, we see that the same ratio increases in the ‘55-64’ group to 63%. The level of education evaluation shows; among the participants with a diploma we see that the university graduates answer the related question as “no” with a ratio of 51%. On the other hand, the group which highly believes that Turkey fulfils its obligations is the ‘non-reader/writer’ group with 69% for answer “yes”. When the answers to the said question are examined according to participants’ occupations we see that housewives believe that Turkey fulfils its related obligations most (62%) whereas the students believe the least (34%) (see Figure 36).

Figure 36 - Distribution of the answers to the question “Do you believe that Turkey fulfills its obligations as required for EU membership?” in different groups (%)

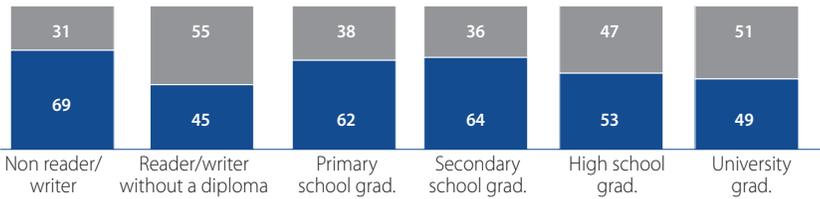
Quadruple geographical region



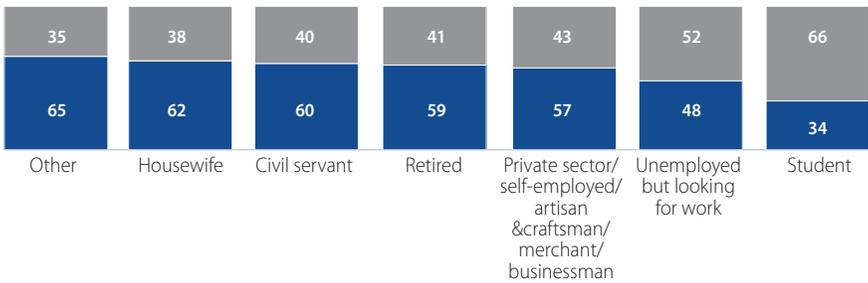
Age groupings



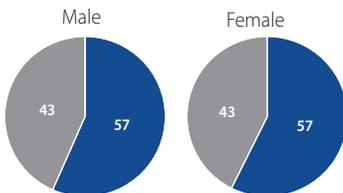
Level of education



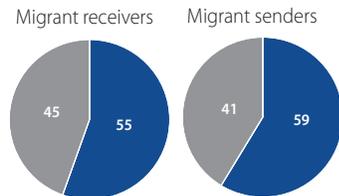
Occupation /employment status



Gender



Migration status of cities



■ Yes ■ No

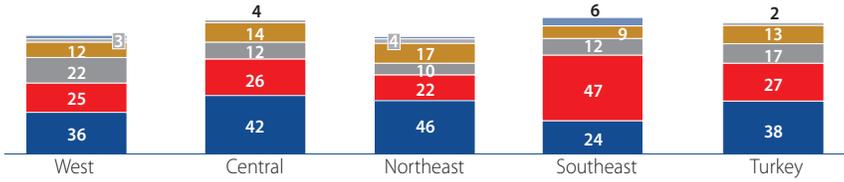
Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

H. EU's Agenda

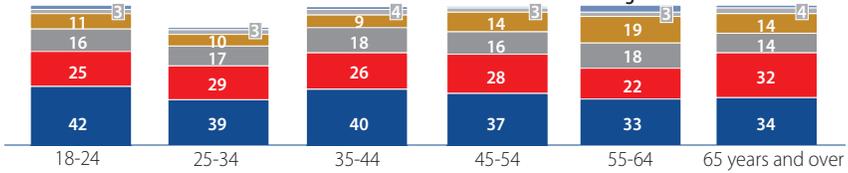
According to 38% of the participants of the public opinion research, the most important agenda item between Turkey and the EU is refugee crises. When the distribution of the answers to the question "In your opinion, what is the most important issue in Turkey – EU relations at the moment?" is analysed according to years; we see that in a survey conducted in 2017, the most important agenda item was regarded as "visa liberalisation" with a ratio of 33%¹⁶. In the research conducted in 2019, the participants regard the "membership negotiations" as the second important agenda item with 27%, "visa exemption" third with 17% and "Customs Union between Turkey and the EU" fourth with 13%. According to quadruple geographical regional distribution; we see that "the refugee crises" receives 46% of the answers in Northeast and is regarded as the number one agenda item; followed by Central region (42%) and Western region (36%). While the number one agenda item according to the Southeast region is "the accession process" with 47%; "refugee crises" receives the least of the answers with a ratio of only 24%. The migrant receiver cities (36%) and the sender cities (39%) both, think the number one agenda item in Turkey-EU relations is the "refugee crises". While the participants in both group of cities think the "accession process" to be the second important issue between Turkey and the EU. The third important agenda item in receiver cities come out as "visa liberalisation" with 21% whereas in sender cities it is the "Customs Union" with a ratio of 14%. As for gender distribution; "refugee crises" is the number one issue both for male (39%) and female (36%) participants; followed by "accession process" with a ratio of 27% for both genders. The age group distribution shows that the "refugee crises" is the most important agenda item with a share of 42% for the '18-24' age group, but its share diminishes to 33% for '55-64' group and 34% for '65 and over' group. When we analyse the distribution of the answers given to the said question according to level of education we see that; the non-reader/writer group regards the "accession process" (79%) and "Customs Union" (21%) as the main items in the agenda; and do not even consider the other choice options. As for other 'level of education' groups, "refugee crises" comes up as the main issue; receiving the least share (34%) in the university graduates. The occupational distribution reveals that, for every occupation group the number one item of the agenda between Turkey and the EU is "refugee crises". Private sector employees' share is highest for this answer (41%) and the retired people group's is lowest (32%) (see Figure 37). When we examine the answers to the abovementioned

Figure 37 - Distribution of the answers to the question “In your opinion, what is the most important issue in Turkey-EU relations at the moment?” in different groups (%)

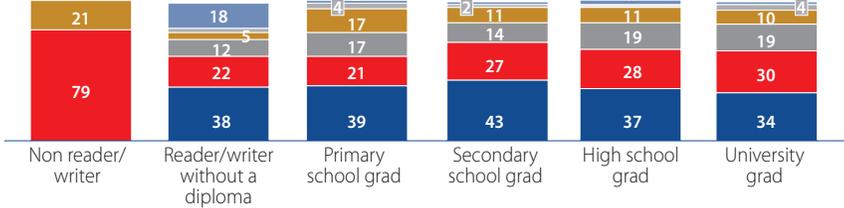
Quadruple geographical region



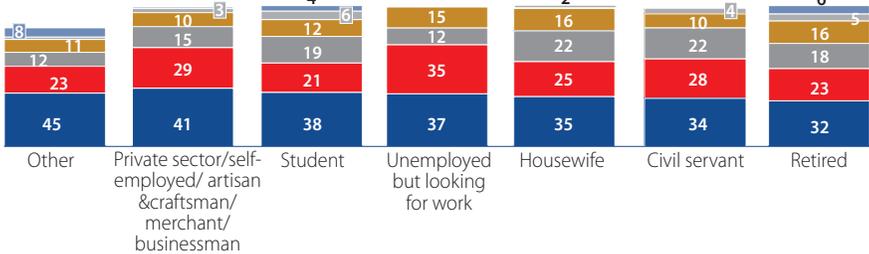
Age groupings



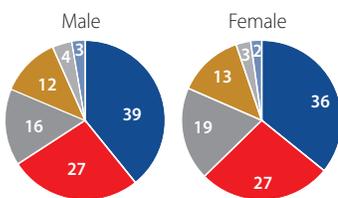
Level of education



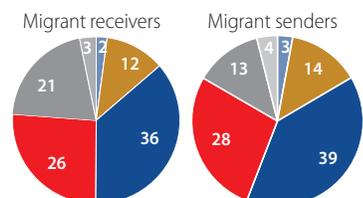
Occupation /employment status



Gender



Migration status of cities

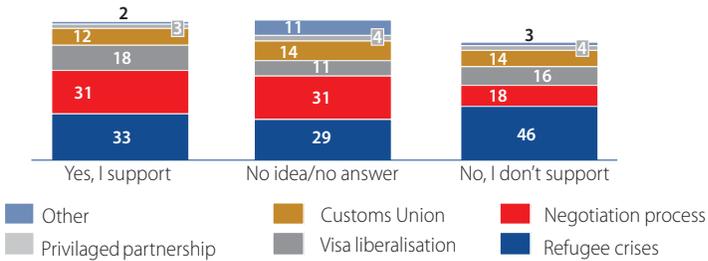


■ Other
■ Refugee crises
■ Accession negotiations
■ Visa liberalisation
■ Customs Union
■ Privileged partnership

Source: Research on the European Union Support and European Perception in Turkish Public Opinion 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

question of the participants who responded the question “do you support Turkey’s EU membership?” affirmatively; we see that they regard the “refugee crises” as the most important agenda item with a ratio of 33% and the “accession process” ranks second (31%). However the participants who do not support EU membership also reply that the “refugee crises” is the most important item with 46%. The participants who answer the question about their support for membership as “no idea/no answer” say they think the “accession process” forms the most important agenda item between Turkey and the EU (31%) (see Figure 38).

Figure 38 - Distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “In your opinion, what is the most important issue in Turkey – EU relations at the moment?” (%)

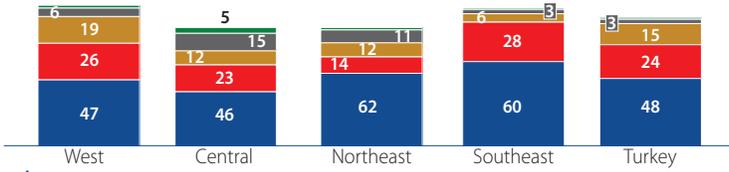


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

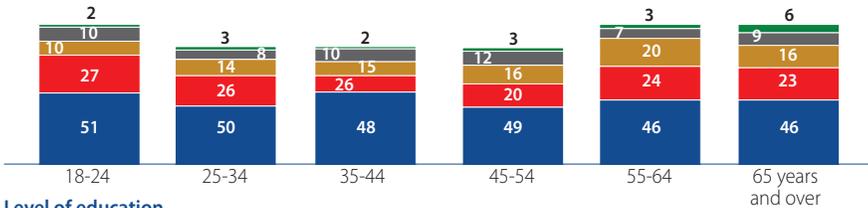
The results of the public opinion research show that the participants think the Customs Union between Turkey and the EU is beneficial both for Turkey and the EU. When we ask the participants the question “What is your opinion concerning the Customs Union between Turkey and the EU?”; we see that 48% of the participants think “it is beneficial both for Turkey and the EU”; followed by the answers of “no idea” (24%), “beneficial for the EU but not for Turkey” (15%), “beneficial for Turkey but not for the EU” (9%) and “not beneficial either for Turkey or the EU” (3%). According to quadruple geographical region distribution, we see that the Customs Union is supported mostly in Northeast (62%) and Southeast (60%). The Western region (47%) and the Central region (46%) think the Customs Union is beneficial both for Turkey and the EU. We also see that the Customs Union is supported more in migrant receiver cities (52%) compared to migrant sender cities (44%). The share of the participants who do not have any idea about the subject is higher (30%) in ‘migrant sender cities’ than in ‘migrant receiver cities’ (20%). From a gender perspective, we see that 50% of male participants and 46% of the female participants think the Custom Union is beneficial for both Turkey and the EU. While the belief that the Customs Union is beneficial for both parties is high in younger participants, it diminishes as the age increases. Hence, while this ratio is recorded as 51% in ‘18-24’ age group, in ‘65 and over’ it is 46%. According to education levels; the ‘non-reader/writer’ group with 55%, high school graduates with 53% and university graduates with 52% are the groups who mostly think the Customs Union is beneficial for both parties. From the perspective of occupational sampling; the groups that mostly think “Customs Union is beneficial for both parties” are civil servants (51%) and private sector employees (50%) (see Figure 39). 58% of the participants who support Turkey’s EU membership think the “Customs Union is beneficial for both Turkey and the EU”. The distribution of the answers given to the question of “What is your opinion concerning the Customs Union between Turkey and the EU?” among the participants who do not support Turkey’s EU membership is as follows; 33% says the “Customs Union is beneficial for both parties” and 26% says the “Customs Union is beneficial for the EU but not for Turkey” (see Figure 40).

Figure 39 - Distribution of the answers to the question “What is your opinion concerning the Customs Union between Turkey and the EU?” in different groups (%)

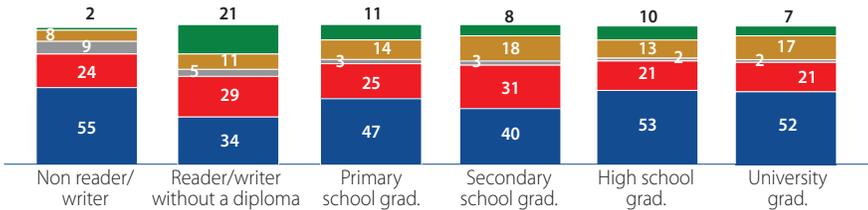
Quadruple geographical region



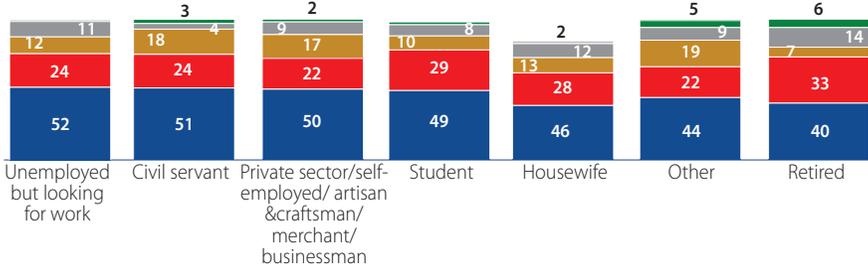
Age groupings



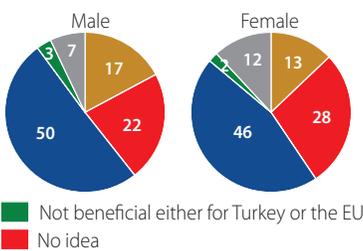
Level of education



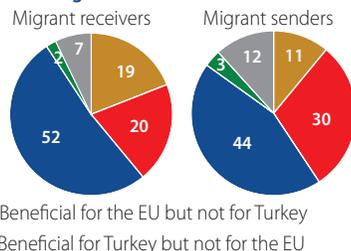
Occupation /employment status



Gender

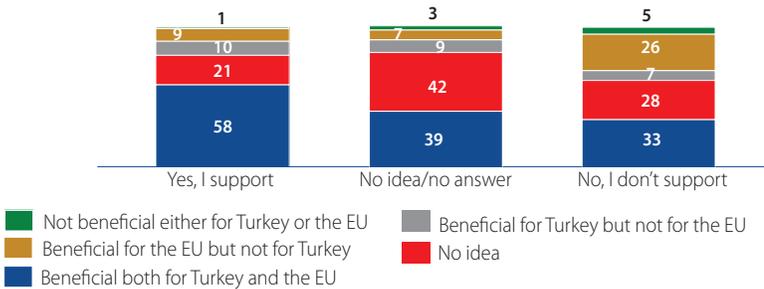


Migration status of cities



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

Figure 40 - Distribution of the answers given to the question “What is your opinion concerning the Customs Union between Turkey and the EU?” according to the answers given to the question “Do you support Turkey’s EU membership?” (%)

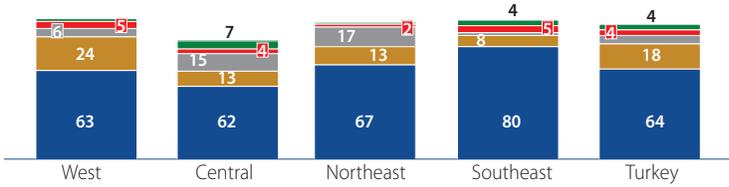


Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

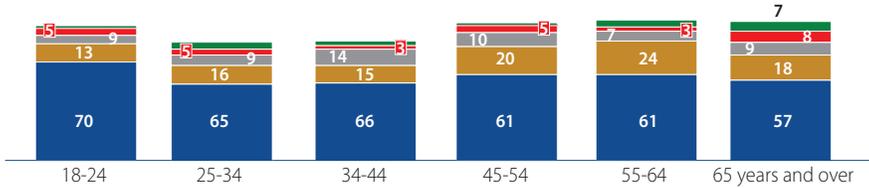
According to the results of the public opinion research, 64% of the participants think the modernization of the Customs Union will be beneficial for both Turkey and the EU. When we evaluate the answers given to the question “How do you comment on the modernization of the Customs Union?”; we see that most of the participants (64%) think it will be “beneficial for both Turkey and the EU”. This answer is followed by “beneficial for the EU but not for Turkey” with 18%, “beneficial for Turkey but not for the EU” with 10% and “beneficial neither for Turkey nor for the EU” with 4%. It is also observed that the share of the participants who do not have any idea about the modernization of the Customs Union is 4%. The ratio of the participants who think “the modernization of the Customs Union is beneficial for both Turkey and the EU” is 80% in Southeast, followed by Northeast (67%), West (63%) and Central (62%) regions. Gender analyses show that male participants think with a 50% share that the modernization of the Customs Union is beneficial for both Turkey and the EU; this ratio is 46% in the female participants. 28% of the female participants and 22% of the male participants say they do not have any idea about the modernization of the Customs Union. The age groupings reveal that; the ‘18-24’ group thinks with a 70% that the modernization of the “Customs Union will be beneficial for both Turkey and the EU” but this ratio declines to 57% as the age increases. On the other hand, it is worth mentioning that the ratio of the belief that the modernization of the “Customs Union is beneficial for both Turkey and the EU” increases as the level of education increases. Hence while this belief is 50% in the ‘non-reader/writer’ group, it increases to be 65% among the university graduates. From the perspective of the occupational status, we see that the unemployed group is the one that has the highest share (76%) in thinking the

Figure 41 - Distribution of the answers to the question “How do you comment on the modernization of the Customs Union?” in different groups (%)

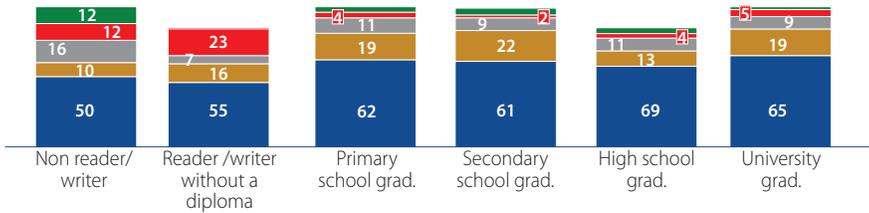
Quadruple geographical region



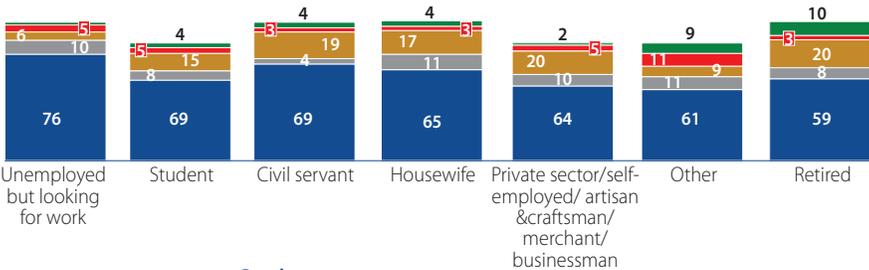
Age groupings



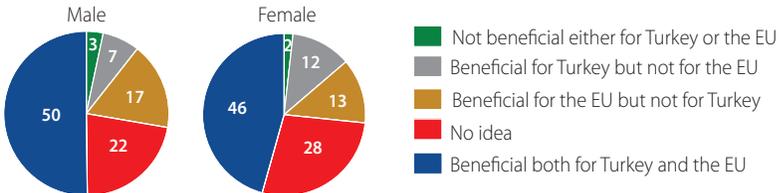
Level of education



Occupation /employment status



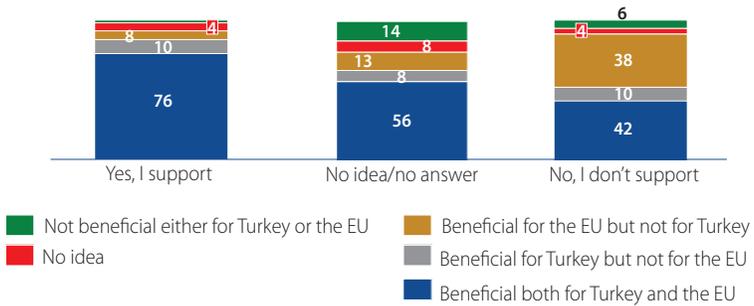
Gender



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

“modernization of the Customs Union will be beneficial for both Turkey and the EU” followed by civil servants and students (69% each), housewives (65%), private sector employees (64%) and the retired people (59%) (see Figure 41). When we evaluate the distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “How do you comment on the modernization of the Customs Union?” we see that 76% of the participants who support membership also think “modernization of the Customs Union will be beneficial for both Turkey and the EU”. However, 38% of the participants who do not support membership think “modernization of the Customs Union will be beneficial for both Turkey and the EU” (see Figure 42).

Figure 42 - Distribution of the answers given to the question “Do you support Turkey’s EU membership?” according to the answers given to the question “How do you comment on the modernization of the Customs Union?” (%)



Source: Research on the European Union Support and European Perception in Turkish Public 2019 – TEPAV and IKV, TURSTAT and TEPAV analyses

About The Economic Policy Research Foundation of Turkey

The Economic Policy Research Foundation of Turkey (TEPAV) is a non-profit making think-tank established in December 2004 by a group of business people, bureaucrats and academicians for the purposes of conducting data-based policy analysis and policy making contributions. TEPAV pursues its activities with the goal of enriching the content of information/data in economy policy areas and in research agendas horizontally overlapping with these areas, as well as drawing technical frameworks to the related arguments. In addition to improving policy proposals, TEPAV also helps ideas come to life through concrete projects.

As a part of its mission, TEPAV develops innovative policy strategies, encourages private sector development in Turkey and in the region. The interdisciplinary approach of TEPAV focuses on strengthening the competitive business environment, improving regional development and supporting international economic integration. Hence, TEPAV serves public and private sector bodies in the region and in Turkey by formulating policy proposals and forming platforms for public dialogue. Within its research framework, TEPAV focuses on concrete policy areas, develops data-based policy analyses and presents its findings as concrete and applicable policy options. Macroeconomic studies, innovation and technological transformation, urban studies and regional development, governance, international economy and regional studies, international trade and legal system studies all form the research areas of TEPAV.

Owing to its Constitution Platform Project in 2012, TEPAV was selected as one of the best 3 think tanks in Europe by the Think Tank Oscars in 2014, held by Spectator magazine in the UK. In 2015, when Turkey assumed the G20's Presidency, TEPAV was given the leadership role in the "think 20" (T20) outreach group. TEPAV also provided content for "Business 20," led by the Chambers of Commerce and Commodity Exchanges of Turkey (TOBB.) Since 2015, TEPAV has been ranking among the top 40 think tanks operating in the fields of foreign policy and international relations in the World Think Tank list published by The University of Pennsylvania.

Since its establishment, TEPAV has maintained a deep and wide-ranging network as a think tank that has conducted many projects with versatile partners in 63 provinces of Turkey and in 60 countries across the world.

About the Economic Development Foundation

Economic Development Foundation (IKV) is a non-governmental research organization specialised on the EU and Turkey-EU relations. It was established in 1965 in order to inform the business world and the general public about the EU and Turkey-EU relations and it has been conducting studies and research in the related areas since its establishment. Within this framework, in 2015, keeping Turkey's EU membership perspective in mind, and as the EU accession negotiations continue, IKV has launched an on-going series of public opinion researches called "Research on the Support for European Union and European Perception in Turkish Public" in order to measure the level of information and awareness in Turkish public vis-à-vis the European Union and to assess the varying opinions of the Turkish public concerning EU membership.

IKV was established with the initiative of Istanbul Chamber of Commerce and Istanbul Chamber of Industry on the 26th November 1965, two years after the entry into force of the Ankara Agreement. Along with the two founding organisations, currently, IKV is supported by trustees representing the business world and sectors, such as the Union of Chambers and Commodity Exchanges of Turkey (TOBB), Turkish Exporters Assembly (TIM), Turkish Industry and Business Association (TUSIAD), Istanbul Textile and Apparel Exporters' Association (IHKIB), Istanbul Commodity Exchange (ITB), Turkish Bank Associations (TBB), Confederation of Employers' Union of Turkey (TISK) and Kocaeli Chamber of Industry. In addition to the trustees, more than 30 organisations support the activities of IKV.

Since its establishment, IKV holds important roles in Turkey's EU membership process, the Customs Union, EU candidacy and accession negotiations that started with the signature of Turkey-EEC Association Agreement and the Additional Protocol. IKV has been a keen observer of the relations between Turkey and the EU through its various publications and research and continues its activities in a manner to warn and inform. In this regard, IKV plays an important role in informing Turkish private sector and the Turkish public about the impacts of the accession process and contributes to their preparations with the support of the representative organisations of Turkish private sector. IKV coordinates the relations between the private sector and the EU, as well as between the private sector and the Turkish public in the areas related to Turkey – EU relations.

IKV Brussels Office is the first representative office established by the Turkish private sector vis-à-vis the EU. It was established in 1984 and has been managing relations with the EU organs and institutions since then. The EU documentary library located in IKV main office in Istanbul serves as an important source of information regarding the EU and Turkey- EU relations. Istanbul EU Information Centre supported by TOBB and EU Delegation also operates within IKV structure.

IKV constantly analyses the EU and Turkey-EU relations through its newsletters, e-bulletins and bulletins in English; it contributes information accumulation and awareness-building with its periodicals, researches and reports. IKV keeps Turkey's EU perspective and Turkey-EU relations on top of the agenda both in Turkey and abroad through its seminars, conferences, workshops and projects. As an organisation specialised on EU and Turkey-EU relations, IKV also follows the global agenda and analyses the developments in Turkey and in the EU. Economic Development Foundation believes that Turkey's EU membership is a win-win formula for both parties and continues its activities as a think-tank notwithstanding any political fluctuations.

Endnotes

- 1 During the analyses the statistics were rounded off to the nearest whole number and percentage share. Thus, the upper total of distribution of sub categories of some variables in the text or in the Figures may not be equal to 100%.
- 2 The calculations of the index values are based upon Herfindahl-Hirschman index.
- 3 Source: TURKSTAT (TÜİK), TEPAV calculations
- 4 ibid
- 5 ibid
- 6 ibid
- 7 ibid
- 8 ibid
- 9 ibid
- 10 ibid
- 11 Source: IKV (2015). Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 276 May, 2015
Source: IKV (2015). Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 283 July, 206
Source: IKV (2015). Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 295 January, 2018
- 12 As the fieldwork was conducted using face to face in house interview method, at first stage the percentage of housewives and students in the distribution of the sampling emerge high. However, when the participants who have not heard about the EU was not included in the follow-up questions about the EU, in the sampling where the follow-up questions about the EU were asked, the percentage of housewives and students emerge very close to Turkey average.
- 13 Source: United Nations Comtrade, CEPII BACI, TEPAV calculations
Note: United Nations Comtrade data is used in all foreign trade analyses. Unless mentioned otherwise, the CEPII BACI data obtained by consolidation of United Nations Comtrade is used.
- 14 Lall, S(2000). The Technological Structure and Performance of Developing Country Manufactured Exports, 1985-1998. QEH Working Paper Series. Eurostat RAMON – Daniela Marconi – Bank of Italy SITC Rev.3 equivalent

- 15 Source: IKV (2015) Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 276 May, 2015
Source: IKV (2016) Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 283 July, 2016
Source: IKV (2018) Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 295 January, 2018
- 16 Source: IKV (2016) Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 283 July, 2016
Source: IKV (2018) Research on the Support for European Union and European Perception in Turkish Public 2015. Economic Development Foundation publications, publication no: 295 January, 2018