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Elite Survey Fieldwork Report

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Introduction

Methodology

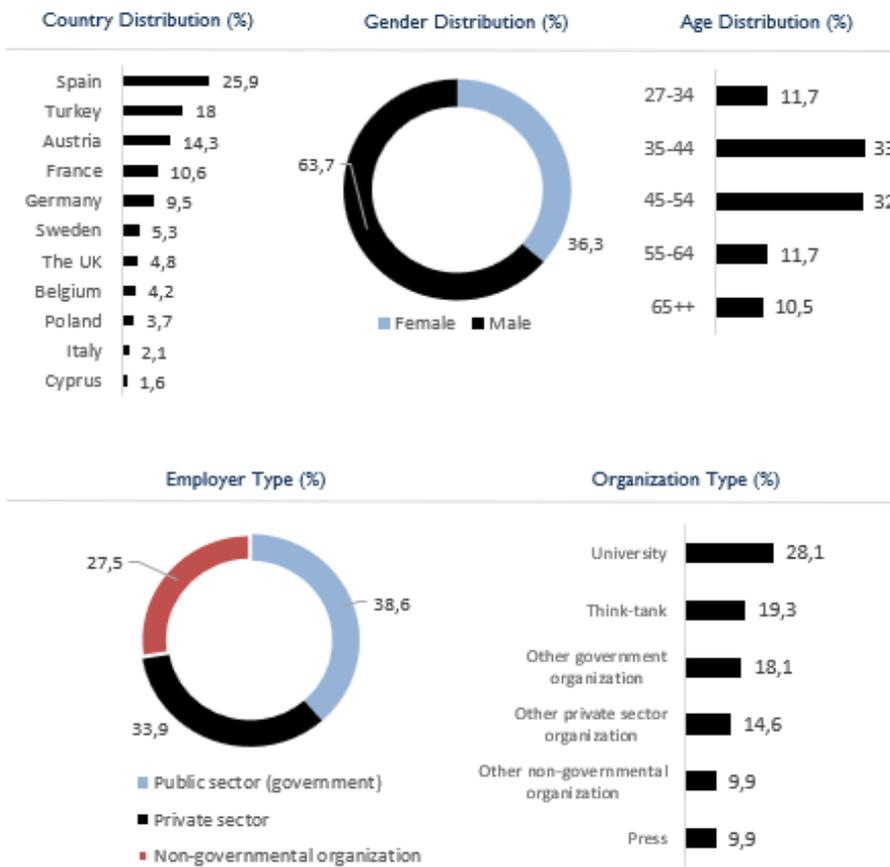
- An online survey was conducted between October 8 and November 23, 2018
- The online survey was undertaken using the *surveymonkey.com* infrastructure.
- The dissemination of the survey was carried out by participating institutions via email.
- The survey was conducted in Georgian, Turkish, French and English.
- The following table presents the number of emails sent for each country. A total of 2500 emails were sent out, as a result of which a total of 189 usable surveys were collected.
- The response rate for the survey is calculated at 7.5%. This figure is rather low for online surveys, however, given the topic and length of the survey these results are within expectation.

Country	Sample
France	250
Turkey	352
Italy	88
Denmark	220
Sweden	56
Austria	220
Germany	288
Spain	250
Greece	61
Cyprus	95
Poland	98
EU Institutions	366
The UK	68
Italy	88
Total	2500

Sample Characteristics

The majority of the participants were males aged between 35-54. While Spain (25.9%) and Turkey (18.0%) enjoyed the highest representation within the sample, experts from a total of 11 countries participated in the survey. With respect to the employer, nearly four out of ten respondents indicated that they are employed in the public sector (government) (38.6%). 33.9% of the respondents work in the private sector, while 27.5% work in non-governmental organizations. University employees make up almost a third of the sample (28.1%), followed by think-tank staff (19.3%), and employees of other government organizations (18.1%).

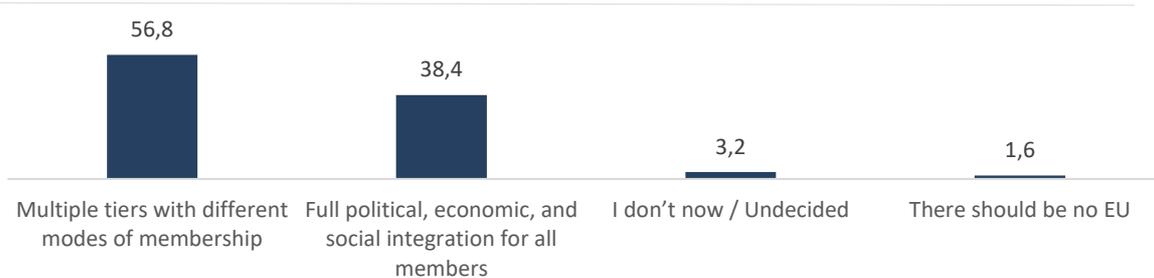




Future of the European Union

Survey results show that over half of the participants believe the best suited scenario for the future of the European Union to be multiple tiers with different modes of membership. 38.4% of participants argue that the best way moving forward remains full political, economic and social integration for all members.

Which of the following scenarios do you think is best suited for the future of the EU? (%)

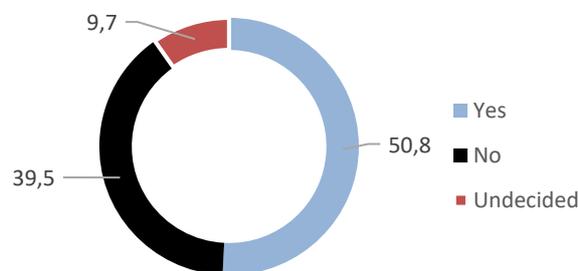


Turkey – EU Relationship Framework

Turkey’s Membership to the European Union

The elites from the 11 countries represented in the sample seem to be divided in their support for Turkey’s membership in the European Union. While 50.8% express support, four out of ten respondents believe that Turkey should not be a member of the European Union, with one undecided on the topic. Although sample size differs from state to state, elites from Austria and Italy seem to favor Turkey’s membership the least, while in Germany, Belgium and France, over six out of ten respondents indicate opinions in favor of Turkey’s accession to the EU. Political tensions between Ankara and Vienna are considered to have been influential in the case of Austria, while it may be important to note that the European states with the highest concentration of Turkish immigrant communities seem to express the highest degree of support for Turkey’s membership to the EU. Amongst the pool of participants, those from Cyprus seem to be the most negatively opinionated with respect to Turkey’s accession to EU membership, with 100.0% expressing opposition.

Do you support Turkey’s membership in the EU? (%)



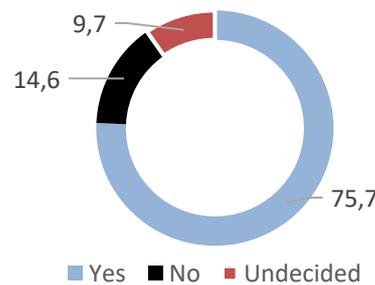
Which country do you work in? (%)	Yes	No	Don't know / Undecided	Total
Austria	22.2	66.7	11.1	100.0
Belgium	62.5	37.5		100.0
France	60.0	40.0		100.0
Germany	64.7	35.3		100.0
Italy	25.0	50.0	25.0	100.0
Poland	57.1	28.6	14.3	100.0
Spain	57.4	27.7	14.9	100.0
Turkey	54.5	39.4	6.1	100.0
Sweden	50.0	40.0	10.0	100.0
Cyprus		100.0		100.0
United Kingdom	55.6	11.1	33.3	100.0



Alternative Solutions: Turkey and the European Economic Area

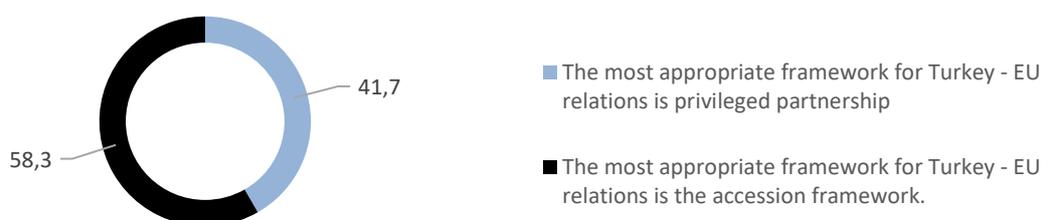
Results show that inclusion in the European Economic Area is considered favorably by the participants. While full EU membership remains a topic of dispute, there is a wide consensus amongst European and Turkish elites that the European Economic Area should be enlarged to include Turkey (75.7%).

Should the European Economic Area be enlarged to include Turkey? (%)



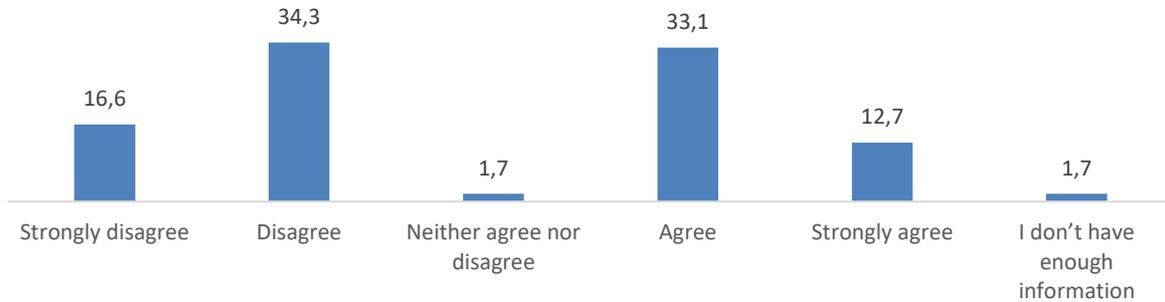
Appropriate Framework

Nearly 6 out of 10 respondents agree with the statement that the most appropriate framework for Turkey-EU relations is the accession framework (58.3%), while 4 argue that a privileged partnership framework would be more suitable moving forward (41.7%). When asked the extent to which they agree with the statement that the accession process is the appropriate framework for the relations, however, 45.8% of the participants agreed, while half of the respondents expressed disagreement (50.9%). Country breakdown of the responses indicates high support for the accession process from respondents who come from Germany, The UK and Spain. Participants from Cyprus remain the most critical on the topic, followed by those from Italy, Austria and Sweden. It is important to note that 6 out of 10 Turkish respondents disagree that the accession is the most suitable framework for Turkey-EU relations, indicating an internal demand in one of the counterparts to negotiate a new cadre of relations.



How much do you agree or disagree with the statement that the accession process is an appropriate framework for EU-Turkey relations? (%)





	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree	I Don't Have Enough Information	Total
Austria	3.7	59.3	0.0	33.3	3.7		100.0
Belgium	25.0	25.0	0.0	25.0	25.0		100.0
Cyprus	66.7	33.3	0.0	0.0	0.0		100.0
France	20.0	30.0	0.0	30.0	20.0		100.0
Germany	12.5	18.8	0.0	56.3	12.5		100.0
Italy	0.0	75.0	0.0	25.0	0.0		100.0
Poland	0.0	57.1	0.0	28.6	0.0	14.3	100.0
Spain	13.3	26.7	0.0	42.2	13.3	4.4	100.0
Sweden	30.0	30.0	10.0	20.0	10.0		100.0
The UK	22.2	11.1	0.0	22.2	44.4		100.0
Turkey	25.0	34.4	6.3	25.0	9.4		100.0

Need for a New Framework

There seems to be a consensus among the Turkish and European elites that there is a need to negotiate a new framework for the future of the Turkey-EU relations. Over seven out of ten respondents agree with the statement (%72.3), indicating a shared opinion that the current framework of relations is stuck and needs to be revisited.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I don't have enough information	Total	Average (max=5)
There is need to negotiate a new framework for the future of the Turkey-EU relationship.	8.7	8.7	9.8	38.2	34.1	0.6	100.0	3.80



Drivers of Turkey – EU Relations

According to the participants, the key drivers of EU-Turkey relations are the areas of migration, security, politics and economy. Energy and identity follow suit, with a slightly lower mean. 63% of participants argue that as long as there is cooperation within the important areas of the relationship, there will not be conflict in the relations between the EU and Turkey. When read together, the two insights may indicate a commonly shared belief that as long as the balance of interactions remains in favor of cooperation in most of the enumerated areas, conflicts in others may be disregarded or at least, tolerated.

How important do you think the following are in driving EU – Turkey relations? (%)

	Not important at all	Not important	Neither important nor unimportant	Important	Very important	I don't have enough information	Total	Average (max=5)
Politics	3.9	2.8	9.4	26.5	56.9	0.6	100.0	4.31
Identity	3.3	8.8	19.9	39.2	26.5	2.2	100.0	3.83
Security	0.0	4.4	10.5	29.8	54.7	0.6	100.0	4.36
Economy	0.0	2.2	11.6	41.4	43.1	1.7	100.0	4.30
Energy	0.0	7.7	28.2	30.9	28.7	4.4	100.0	3.94
Migration	0.6	6.1	2.8	33.3	55.0	2.2	100.0	4.43

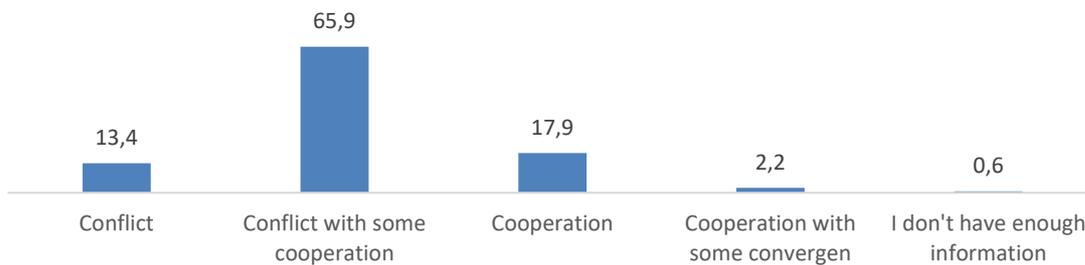
The Future of Turkey – EU Relations

Future of relations: Conflict or cooperation?

According to 65.9% of the participants, EU-Turkey relations will be characterised by conflict with some cooperation in the period between now and 2023. Politics, previously deemed to be amongst the key drivers of the Turkey-EU relationship, is also deemed as the most major catalyst for a conflicted near future EU-Turkey relationship. In other words, while the respondents think that the relationship between the EU and Turkey will not be shaped by politics, the conflicts between the two sides will be greatly caused by politics. However, the areas of migration, security, economy and energy seem to be areas in which the respondents believe Turkey and the EU will have to find a certain extent of common ground. Therefore, it is possible to argue that the respondents perceive the cooperation in these areas will stop tensions in politics from escalating into conflict, thus keeping the overall relationship in a state of “conflict with some cooperation”.

In your opinion, which of the following do you think will best describe EU-Turkey relations between now and 2023?





Which of the following scenarios do you think will best describe EU-Turkey relations between now and 2023, in the areas listed below? (%)

	Conflict	Conflict with some cooperation	Cooperation	Cooperation with some convergence	Convergence	I don't have enough information	Total
Politics	11.7	67.0	14.0	6.1	0.0	1,1	100.0
Security	1.7	24.0	40.8	22.3	9.5	1,7	100.0
Economy	1.1	20.7	38.0	33.5	5.0	1,7	100.0
Energy	1.1	12.8	49.2	20.1	3.4	13,4	100.0
Migration	2.2	17.3	60.3	19.0	0.0	1.1	100.0

While it is a majority held belief that the relations will continue to be characterised by a mix of conflict and cooperation, there seems to be a consensus that as long as there is cooperation in the areas deemed as the most important drivers of the relations between Turkey and the EU, tensions will not translate into conflict. The future predictions of the participants issues related to economy, energy and migration will be handled in collaboration, indicating that these will be the main fields forcing the two entities to find a common ground at times when tensions rise. European elites also believe, much to the benefit of Turkey, that the country should be consulted in the projects it contributes to, indicating support for a more nuanced, better established two-way relationship. Amongst existing options, it is believed that a modernised Customs Union has the strongest potential to improve ties between Turkey and the EU.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I don't have enough information	Total	Average (max=5)
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As long as there is cooperation within important areas of the relationship, tensions will not escalate into conflict.	4.5	8.5	19.3	50.6	15.9	1.1	100.0	3.66
Turkey-EU relations will be characterized by a mix of cooperation and conflict between now and 2023.	4.0	1.7	10.8	48.3	30.7	4.5	100.0	4.05
Turkey should be consulted in the European projects it contributes to (e.g. Turkey should be consulted prior to the next time the European Commission announces a research and innovation program).).	2.9	8.6	20.1	42.0	24.7	1.7	100.0	3.78
Turkey and the EU will step up cooperation within the Permanent Structured Cooperation (PESCO) agreement.	1.7	11.9	27.3	30.1	4.5	24.4	100.0	3.32
A modernized Customs Union has the strongest potential to improve relations between the EU and Turkey.	2.3	5.7	17.8	51.1	13.8	9.2	100.0	3.75
Turkey and the EU will jointly push back against disruptions in energy transit from Russia.	4.5	20.5	17.0	40.3	6.8	10.8	100.0	3.27
Turkey will increasingly be seen as a buffer for migration as right wing politics rises across the EU.	5.1	8.0	14.8	43.2	27.3	1.7	100.0	3.81
Turkey and the EU will have to keep cooperating on energy-related matters, as long as gas remains a key component of the European energy mix.	0.0	5.7	21.0	44.3	21.0	8.0	100.0	3.88
The importance Erdogan places on the economy’s strong performance will force Turkey and the EU to maintain, if not improve economic ties.	6.5	18.0	26.6	29.5	15.1	4.3	100.0	3.30



Most Suitable Framework Moving Forward

As stated in the first section of the survey results, the necessity to negotiate a new framework for the future of Turkey-EU relations is a majority held belief amongst the elites of both sides (72.3%). While there is no prevailing alternative that is regarded as the most suitable framework, certain questions indicate the way in which Turkish and European elites believe it should be constructed. On one hand, the elites do not seem to be in favor of strong shifts and radical steps in the way the relations are handled. Support for the official termination of the accession process before the construction of a new relationship framework is relatively low (%30.2). On the other hand, their review of the bilateral relations captures the complexity and the uniqueness of the ties between the two sides, with multiple layers of costs and benefits. 57.9% of survey participants agree that none of the existing models of integration or association between the EU and third countries (e.g. Norway and the EU) can sufficiently capture Turkey-EU relations. Furthermore, the elites seem to support the continuity of a relationship with conditionality and rules, perhaps acknowledging the transformative power of EU enlargement in prospective member states. Indeed, 72.3% of respondents disagree with the statement that the Turkey-EU relationship should be purely transactional, with no political conditionality or rules-based framework. 54.9% argue for a norm-based relationship with full membership still on the agenda; and 48.6% disagree that integration should be dropped from the agenda.

The survey results show that the most commonly shared opinion with regards to the future of the relations is that the EU-Turkey relationship should move towards a more innovative institutional arrangement which would not preclude membership while not emphasizing it for the moment.



	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	I don't have enough information	Total	Average (max=5)
None of the existing models of integration or association between the EU and third countries (e.g. Norway and the EU) can sufficiently capture Turkey-EU relations.	4.3	10.7	15.7	33.6	24.3	11.4	100.0	3.71
The EU-Turkey relationship should be norm-based, with full membership still on the table.	12.1	16.8	15.6	32.4	22.5	0.6	100.0	3.37
The EU-Turkey relationship should move towards differentiated integration.	6.4	22.0	24.9	36.4	9.2	1.2	100.0	3.20
The EU-Turkey relationship should move towards cooperation on practical matters, but drop integration from the agenda.	16.2	32.4	13.3	24.3	13.3	0.6	100.0	2.86
The EU-Turkey relationship should move towards a more innovative institutional arrangement which would not preclude membership while not emphasizing it for the moment.	4.0	17.3	18.5	34.7	24.9	0.6	100.0	3.59
Turkey and the EU should formally end the accession track before negotiating a new framework for their relationship.	24.4	23.8	19.8	19.2	11.0	1.7	100.0	2.68
There is need to negotiate a new framework for the future of the Turkey-EU relationship.	8.7	8.7	9.8	38.2	34.1	0.6	100.0	3.81
The Turkey-EU relationship should be purely transactional, with no political conditionality or rules-based framework.	38.7	33.5	15.0	4.0	6.9	1.7	100.0	2.05



Annex I: Privacy Statement

No personal information was collected during the survey and the following privacy statement was provided to all participants:

Information on the FEUTURE project and the aim of the elite survey

The FEUTURE elite survey aims to understand elite opinion on Turkey-EU relations in Turkey and the EU.

The survey is being carried out as part of the research project FEUTURE – “The Future of EU-Turkey Relations: Mapping Dynamics and Testing Scenarios”. FEUTURE is a consortium of 15 partners, which include leading universities and think tanks in Europe, Turkey and the EU’s neighborhood. The project coordinator is Prof. Dr. Wolfgang Wessels (University of Cologne) and the scientific coordinator is Dr. Nathalie Tocci (Istituto Affari Internazionali). To find out more information about the project, click here.

The survey coordinator can be contacted here: [beken.saaticioglu\(at\)mef.edu.tr](mailto:beken.saaticioglu@mef.edu.tr), MEF University Ayazaga Cad. No. 4 34396, Maslak, Sariyer, Istanbul, TURKEY; phone: +90 212 395 3678.

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Data Protection

FEUTURE is committed to protecting personal information in compliance with the relevant EU legislation on data protection.

The survey will not collect any identifying information. It will not be possible to associate responses to the survey with email addresses or other individual information.

E-mail addresses were collected and used only for the initial purpose of inviting respondents to participate in the survey and will not be shared with any other parties. In compliance with European data protection laws, contacted respondents have the right not to receive any further e-mails on the survey and can inform the survey coordinators accordingly.

The Survey Monkey online tool is employed for the data collection (www.surveymonkey.com).

Online data

The survey will not collect IP addresses of respondents

SSL (Secure Sockets Layer) is employed to ensure a secure connection between client and server



You find detailed information on Survey Monkey's privacy policy at this link: <https://www.surveymonkey.com/mp/legal/privacy-policy/>

You find detailed information on Survey Monkey's cookies policy at this link: <https://www.surveymonkey.com/mp/legal/cookies/>

How FEUTURE will use the information collected in the survey

Use of information collected in the survey will be restricted to research purposes. It will not be possible to establish a link between published data and individual respondents.

The information collected will be published as part of FEUTURE's research output (e.g. FEUTURE online papers).

FEUTURE is part of the EU's Open Research Data Pilot (ORD Pilot) and is committed to providing open access to its research results. Therefore, the aggregated data derived from the survey responses will be published in the form of a .csv, .dta, .rds, .sav, and/or another machine readable file format in the online repository ZENODO (<https://zenodo.org/>) and on CRRC's Online Data Portal (caucasusbarometer.org) at the end of the project.



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ABOUT FEUTURE

FEUTURE sets out to explore fully different options for further EU-Turkey cooperation in the next decade, including analysis of the challenges and opportunities connected with further integration of Turkey with the EU.

To do so, FEUTURE applies a comprehensive research approach with the following three main objectives:

1. Mapping the dynamics of the EU-Turkey relationship in terms of their underlying historical narratives and thematic key drivers.
2. Testing and substantiating the most likely scenario(s) for the future and assessing the implications (challenges and opportunities) these may have on the EU and Turkey, as well as the neighbourhood and the global scene.
3. Drawing policy recommendations for the EU and Turkey on the basis of a strong evidence-based foundation in the future trajectory of EU-Turkey relations.

FEUTURE is coordinated by Prof. Dr. Wolfgang Wessels, Director of the Centre for Turkey and European Union Studies at the University of Cologne and Dr. Nathalie Tocci, Director of Istituto Affari Internazionali, Rome.

The FEUTURE consortium consists of 15 renowned universities and think tanks from the EU, Turkey and the neighbourhood.

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