



TOWARDS A SHARED VISION OF NORMALIZATION OF ARMENIAN-TURKISH RELATIONS

***Key findings based on the public opinion survey conducted within the
Support to the Armenia-Turkey Normalisation Process Program funded by the
European Union***

*This publication has been produced with the assistance of the European Union within the framework of the
Support to the Armenia-Turkey Normalisation Process. The contents of this publication are the sole
responsibility of CRRC-Armenia and can in no way be taken to reflect the views of the European Union or any
other Consortium partner in the Programme.*

Yerevan
April 2015

CONTENTS

Foreword and acknowledgment.....	4
Abbreviations.....	5
Executive Summary.....	6
Introduction: Current State of Armenia-Turkey Relations	8
1. Data.....	9
2. Awareness of Armenian-Turkish Relations.....	10
3. Regulation of Armenia-Turkey Relations.....	13
4. Attitudes towards Turkey	19
5. Recognition of the Armenian Genocide and Commemoration Behavior.....	20
6. Armenia-Turkey Rapprochement Issues.....	22
7. Major Findings and Policy Recommendations.....	24
Annex 1: Additional Figures and Tables.....	27
Annex 2: Sampling Methodology and Demographic Profile of Respondents	34

LIST OF FIGURES AND TABLES

Figure 2.1. Are you interested in normalization of the official Armenia-Turkey relations?.....	10
Figure 2.2. The relationship between interest and awareness of the Armenian-Turkish relations.....	11
Figure 2.3. With regards to Armenia-Turkey relations, whose opinions do you trust most in Turkey?.....	12
Figure 2.4. What interests you most about the Armenia-Turkey relations?	12
Figure 3.1. To what extent do you approve of opening the border between Armenia and Turkey?.....	13
Table 1. To what extent would you support opening the border with Turkey?	14
Figure 3.2. Approval of the border opening by educational level of respondents	15
Figure 3.3. Approval of the border opening by type of settlement of respondents	15
Table 2. The impact of opening the border between Armenia and Turkey will affect Armenia's:	16
Figure 3.4. Opening of the border and the perceived level of its impact on the economy and security	16
Figure 3.5. Attitudes on the impact of the border opening on the economy by education of respondents	17
Figure 3.6. Opening the border and its impact on the security: differences by types of regions	17
Figure 3.7. The influence of the normalization of Armenia-Turkey relations on the following:	18
Figure 3.8. Attitudes regarding suspension of Armenia-Turkey protocols signed in 2009 to establish diplomatic relations and open the border	18
Figure 4.1. To what extent do you agree with the following statements regarding Turkey and Turkish people?	19
Figure 4.2. Perceptions regarding the overall attitude of Turkish people towards Armenians	20
Figure 5.1. What kind of reparation do you expect Turkey to pay? (first most mentioned answers).....	21
Figure 5.2. In your opinion, what will make Turkey recognize the Armenian Genocide?.....	22
Figure 6.1. In which sectors should Armenia establish relations with Turkey? (% of all the responses).....	23
Figure 6.2. What civil society initiatives targeting Armenia-Turkey reconciliation would you approve of?	23
Figure 7. Respondents' interest in normalization of the official Armenian-Turkish relation for different age groups.....	27
Figure 8. Interest in normalization of the official Armenia-Turkey relation by educational level of respondents.....	27
Figure 9. Respondents' interest in normalization of the official Armenian-Turkish relation regions bordered and not bordered with Turkey	28
Figure 10. Whose opinions on Armenian-Turkish relations do you trust the most in Armenia?	28
Figure 11. To what extent do you approve opening of the Armenia-Turkey border?	29
Figure 12. The fraction of respondents approving Armenians'	29
Figure 13. To what extent do you approve opening of the Armenia-Turkey border with preconditions?	30
Figure 14. How can you describe your attitude towards Turkey's possible membership of the EU?	30
Figure 15. Conditions that Turkey should meet in order to join the EU (more than one answer applied)	31
Figure 16. Has any of your ancestors suffered from the Armenian Genocide.....	31
Figure 17. What should be Armenia's position regarding its relations with Turkey?	32
Figure 18. In which sectors should Armenia establish relations with Turkey?	32
Figure 19. In your opinion, to what extent does Azerbaijan affect the Armenian-Turkish relations?.....	33
Table 3. A glance from Turkey.....	33
Table 4. Sample area by settlement types and Marzes	34
Table 5. Respondents' demographic profile.....	35

Foreword and acknowledgment

Dear reader,

It is a great pleasure to introduce this study on normalization relations between the Republic of Armenia and the Republic of Turkey. The study aims to promote efforts toward the normalization of relations between Turkey and Armenia and toward an open people-to-people dialogue, through cultivating the access to balanced information in both Armenian and Turkish societies. The key objectives include: measure the public's views towards the normalization of the Turkish-Armenian relations through a public opinion survey in Armenia; identify and discuss the possible ways and incentives for the normalization; develop and promote policy recommendations in support of the normalization process.

Due to historical factors, including both the Armenian Genocide and the Nagorno-Karabakh conflict with Azerbaijan, Armenia and Turkey have a complicated relationship. Thus, this report also seeks to disclose the extent at which the initiatives of the Armenian Government and the civil society are in line with preferences of Armenian citizens regarding the recent developments in official Yerevan and Ankara. CRRC-Armenia and its Turkish partner, the Turkish Economic and Social Studies Foundation (TESEV) that assisted with the project, wholeheartedly believe that public opinion on this matter is of utmost importance in informing the broad audience, including policy makers, researchers, and the media. The two groups' understanding of the current Armenia-Turkey relationship, as well as their ideas at how to rectify the current situation, is, in our opinion, vital to create a more fluid society, both in the national and international realm.

This study is a great example of the collaborative efforts between Armenian and Turkish civil society organizations and think tanks. At different times, certain research on the matter was carried out. In 2010, though not as detailed as the current survey, CRRC-Armenia and TESEV have already completed studies on the public opinion of relations between the two nations. To get a better sense of people's understanding about the Armenian-Turkish relationship, CRRC-Armenia employed few questions through its annual Caucasus Barometer surveys. Similarly, in 2005, on the 90th commemoration of the Armenian Genocide, the Armenian Center for National and International Studies (ACNIS) completed a study to understand public opinion of Armenians. In the same respect, the Turkish Centre for Economics and Foreign Policy Studies (EDAM) explored attitudes of Turkish people regarding the Armenia-Turkey relations. Though, all previous studies were thorough, we believed that there was something vital missing from our previous reports: a high level of exchange for the 100th commemoration of the Armenian Genocide. We adopted many questions from the previous studies enabling comparison of the responses of citizens. We hope that we were able to complete a well-rounded, full report that will bring about new opportunities for an open discussion, both within the national governments themselves, and also across international lines. The results of our findings will hopefully lead to economic, political, and social development between Armenia and Turkey. Meantime, we will be happy to hear everyone's concerns, remarks and recommendations regarding the findings explored in the report.

I would also like to take this moment to acknowledge all those who collaborated on this report. Aleksander Grigoryan, who wrote and edited the analytical report; Monica Shahmenendyan, who completed the sampling and chart preparations; Hrachia Kazhoyan and Suzanna Parseghyan for questionnaire development; Talar Kakilian, Aybars Görgülü, Zarrin Cengiz and Emine Onaran, who assisted in editing and translating the report; Anna Shahnazaryan, Ara Papyan, Artak Ayunts, Ester Hakobyan, Gevorg Ter-Gabrielyan, Lusine Kharatyan, Tigran Matosyan, Vahram Ter-Matevosyan and others, who reviewed and commented the questionnaire; and to all other individuals who helped make this report come true, thank you!

Sincerely,

Heghine Manasyan,
CRRC-Armenia CEO

Abbreviations

ACNIS	Armenian Center for National and International Studies
CB	Caucasus Barometer
CRRC	Caucasus Research Resource Center
EDAM	Centre for Economics and Foreign Policy Studies
EPF	Eurasia Partnership Foundation
EU	European Union
RA	Republic of Armenia
RF	Russian Federation
TESEV	Turkish Economic and Social Studies Foundation
UN	United Nations organization
USA	United States of America

Executive Summary

Our findings and recommendations from the new public poll aiming to support the Armenia-Turkey normalization are as follows:

- Respondents with a strong interest about the Armenian-Turkish relationship exhibit a corresponding awareness. The awareness can further be increased if there is access to information on Armenian-Turkish relationship. As for sources of information, both research based and expert opinions are influential in shaping respondents' views on the Armenian-Turkish relations. From a policy perspective, investment in research and expert studies in this area will help align public opinion towards a more socially cohesive direction, provided that the generated scientific and/or professional products will be outcomes of independent and objective research.
- A higher level of education is associated with a higher rate of approval of the opening of the Armenian-Turkish border. Furthermore, educated respondents believe more in the positive impact of the opening the border on the economy. A straightforward policy implication is that, in the long run, investment in education, which will also indirectly increase the awareness of the society, will help facilitate the normalization process.
- There are certain differences in people's preferences for the normalization depending on the location distance from the Armenian-Turkish border. Overall, respondents in regions bordered with Turkey are more interested in the normalization of bilateral relations. Even for a sensitive issue like security, the majority of respondents who live in regions that border Turkey have expressed that the opening of the border would have a positive impact in their areas. Still, there is no significant difference between respondents in regions bordering and not bordering with Turkey, when evaluating the impact of the opening the border on the economy, suggesting that the relevance of the normalization from the economic perspective is well acknowledged by respondents from all regions.
- With regards to knowledge pertaining to the Armenian-Turkish relations' normalization process, certain policy efforts will be needed to make the products of sophisticated research available to the general public. Coordinated joint initiatives between research institutions and central government entities that are responsible for these policies (Ministry of Foreign Affairs, Ministry of Diaspora, among others) will facilitate the process.
- The respondents stated different opinions with regards to the impact of the opening the border on national security. Conversely, respondents approved the opening of the border when evaluating its impact on the economy. Normalization without preconditions does not fully dissipate concerns about security, but at least formally exclude the direct (negative) correlation between economic and security factors in the official policies. Clearly, the tradeoff costs of economic development from opening the border are well acknowledged by the respondents.
- Poll participants are remarkably interested in bilateral normalization, suggesting that the Armenian Government should continue to invest time and effort into establishing a relationship with Turkey. People acknowledge that closed borders and the absence of a diplomatic relations with Turkey hinder Armenia's development. Interest in normalization is high for all age groups throughout society.
- The survey shows that normalization is supported by the majority of the society. The picture, however, is more complex when the factor of preconditions is explicitly stated. The general observation is that the approval rate dramatically decreases when the opening the border comes *with*

preconditions, compared to the same *without preconditions*. That is, for the Armenian society, opening the border without preconditions is preferred to the opening the border with preconditions.

- Regarding the change in Armenians' attitude towards preconditions, they value a *no preconditions* approach in the bilateral relationship more so in 2014 than they did in 2010. A separate study is needed to identify the impact of the official position on the change of people's attitude towards the *no preconditions* approach in recent years.
- However, according to the respondents, throughout the process of establishing normalization without preconditions, issues pertaining to the Armenian Genocide and/or the Nagorno-Karabakh conflict should not be disregarded. When opening the border is under question, respondents' interests are rather concentrated towards these two issues. The complexity of the relationship makes diplomatic talks and policy moves even more complex.
- Though we lack a common base for data collected within the ACNIS (2005) survey, the Caucasus Barometer (2010) survey and the current dataset, the general pattern in recent decade is that Armenians express a more neutral attitude towards Turkey's possible membership of the European Union. Many see Turkey's accession into the EU beneficial for Armenia, as it would entail certain responsibilities and conditions that Turkey would need to meet prior to joining the EU. There is, however, one important exception: in 2014, 94% respondents from our dataset thought that the recognition of the Armenian Genocide should be a precondition for Turkey to join the EU, while in 2012, a little less but still 84% of respondents from the Caucasus Barometer survey had the same opinion. We conclude that, in 2014, Armenians placed a higher emphasis on the recognition of the Genocide than they did two years ago.
- According to the survey results, the Armenian Government, adhering to the respondents' preferences, should claim reparation of territorial rights from Turkey as a consequence of the official recognition of the Armenian Genocide. Despite the strong awareness on the importance of economic development, respondents' claims for reparations are continuously high in demand. Armenians are well aware that Turkey is very sensitive to reparation claims and consider them, along with Nagorno-Karabakh, as one of the main preconditions for establishing economic ties.
- Despite the very initiatives of Yerevan towards normalization and recognition of the Armenian Genocide, respondents do not believe that official policies will make Turkey recognize the Armenian Genocide. Rather, they believe that recognition of the Genocide can be achieved through pressures from a third party, such as Russia, the EU and/or the US. Current policies of Yerevan towards recognition should be more targeted and efficient in order to convince Armenians.
- More than 70% of respondents indicate that Azerbaijan's policies affect the Armenian-Turkish relations greatly. If Armenia makes a policy move, it is strongly believed that the response by Ankara will incorporate Azerbaijan's interests.
- Finally, respondents give some credit to the role of civil society initiatives targeting Armenia-Turkey reconciliation. There are several areas of initiatives presented to the respondents for indication, but none of them has support from the majority of respondents. We hypothesize that responses reflect distrust towards the influence of civil initiatives on the reconciliation process. What is the "contribution" of the Armenian Government in this outcome? Our analysis suggests that the official policies are quite in line with the societal preferences, implying that there should be no incentives for the Armenian Government to create obstacles for civil society initiatives, as long as they fairly represent the needs of society. The alternative explanation for such a low relevance of civil initiatives (according to respondents) is that the Armenian society does not value civil initiatives enough and is

therefore reluctant to delegate tasks to civil society organizations working on the normalization of the Armenian-Turkish relationship. If this is the case, long term efforts from the Armenian Government and international organizations are needed to increase the importance and role of civil society organizations and their initiatives, particularly during the normalization process.

Introduction: Current State of Armenia-Turkey Relations

Located at the crossroads of Europe and Asia, Armenia and Turkey are two neighboring countries that share a 328km land border. The two countries have not had official diplomatic relations since 1993, when Turkey closed the border in reaction to the ongoing armed conflict between Armenia and Azerbaijan over the region of Nagorno-Karabakh. While there are numerous estimations as to the potential economic and social impacts of the Armenian-Turkish border¹, opening the border is generally seen as vitally important, not only for the stability of Armenia and Turkey, but also for the region as a whole. The most recent attempt at addressing the border issues took place in 2009, when the Turkish and Armenian government, along with mediation from the international community, began their so-called “football diplomacy”². Nevertheless, in 2010, negotiations were stalled and the rapprochement process was suspended³. There have been several complex and volatile issues that has kept the negotiations from moving forward. The following are the three most important issues:

- *Genocide recognition*: Arguably the most contentious and emotional issue holding up negotiations between Turkey and Armenia is the Armenian Genocide of the early 20th century. Armenia has made it clear that the recognition of the Genocide a key issue in its foreign policy. Turkey persistently refuses to recognize the Armenian Genocide, and calls for delegating the issue to historians⁴.
- *Territorial claims*: Turkey has consistently expressed concern over the possibility of Armenia making territorial claims, asserting that Armenia has yet to formally recognize the treaties of Kars (1921) and Alexandropol (1920), which established the two states’ current borders.
- *Nagorno-Karabakh*: The conflict between Armenia and Azerbaijan, which has resulted in a state of “no war-no peace” since the mid-1990’s, has had a strong influence on Armenian-Turkish relations. Beginning in the late 1980’s, Armenians in the Nagorno-Karabakh Autonomous Oblast of Azerbaijan voiced their right to self-determination and (re)unification with Armenia. Following the fall of the Soviet Union, the issues between Armenia and Azerbaijan continued to escalate, resulting in war between the two nations. While a ceasefire has been in place since 1994, an analyst from Turkey states that, “Armenia continues to control close to 20% of Azeri territory, in contradiction of international law and the United Nations General Assembly”⁵. In response, Azerbaijan has pressured Turkey, its closest ally, to keep their border with Armenia closed in the hope that it would force Armenia to withdraw its troops from Western Azerbaijan.⁶ Armenia, on the other hand, has declared that its relations with

1 According to Evgeny Polyakov, World Bank expert, opening the Armenia-Turkey and Armenia-Azerbaijan borders would increase Armenian exports by 200% and GDP by 30% (see Polyakov, E. (2000). “Changing Trade Patterns after Conflict Resolution in SouthCaucasus”, World Bank paper). Another paper developed by AEPLAC experts suggests much less impact: 17.7% increase in exports and 2.7% - in GDP (see Jrbashyan, T. at al (2005). “Study of the Economic Impact on the Armenian Economy from Re-Opening of the Armenian-Turkish Borders. Implications for External Trade”, Armenian-European Policy and Legal Advice Centre (AEPLAC), www.aeplac.eu). Beilocket al estimated that border opening will increase Armenian imports from Turkey by 50% and exports to Turkey by 38% (see Beilock, R., K.Toroysan, and A.Gagnidze, (2006a). “A Phased Strategy for Opening Armenia’s Western Border”, Armenian Journal of Public Policy, Conference Proceedings, March 2007, www.aiprg.net).

2 Turkey and Armenia started their dialogue when Armenian President, Serge Sargsyan, invited his Turkish counterpart, Abdullah Gul, to attend a Turkish-Armenian soccer match in Yerevan in September of 2008.

3 Görgülü, A., Iskandaryan, A., and Minasyan, S. (2010) “Turkey-Armenia Dialogue Series: Assessing the Rapprochement Process”, Working Paper of TESEV.

http://www.tesev.org.tr/assets/publications/file/Assessing%20the%20Raprochment%20Process_05.2010.pdf

⁴ In 2005, the Turkish Prime Minister proposed the President of Armenia to establish a joint group of historians and other experts for this purpose (see David Shahnazaryan, “Turkish Policy Quarterly”, Fall 2014).

⁵ Görgülü, A. 2008. ‘Turkey-Armenia Relations: A Vicious Circle’, Turkish Economic and Social Studies Foundation.

⁶ de Waal, T. 2011. ‘Turkey and Armenia: A Second Chance?’ Turkish Policy Quarterly.

Azerbaijan and the Nagorno-Karabakh issue should in no way influence negotiations with Turkey, as they are unrelated.

The new public opinion poll aims to identify Armenians' attitude towards the normalization of the Armenian-Turkish relations. In light of recent developments between officials in Yerevan and Ankara, the poll aims to disclose to what extent the initiatives of the Armenian government are in line with preferences of Armenian citizens. When applicable, the results from this public poll have been compared with the results retrieved from identical questions from the Caucasus Barometer dataset⁷. This comparison provides a dynamic picture of how public opinion may have changed over a specified issue.

1. Data

The analysis below is drawn from the database “Public Opinion Poll: The Ways for Normalization of Armenian-Turkish Relations”, conducted by the Caucasus Research Resource Center (CRRC)-Armenia in December 13-25, 2014. The questionnaire, employed with 1164 adult population of randomly sampled households (details on sampling methodology and demographic profile of respondents are presented in Annex 2), included 5 sections, each of them targeting a distinct aspect of Armenian-Turkish relations:

- Overall Awareness of Armenian-Turkish Relations,
- Regulation of Armenian-Turkish Relations,
- Attitudes towards Turkey,
- Recognition of the Armenian Genocide and Commemoration Behavior,
- Armenia-Turkey Rapprochement.

The dataset constructed from the public poll addresses a large set of issues in connection with the normalization of the Armenian-Turkish relations. In the last decade, two other datasets have been collected addressing issues regarding the Armenian-Turkish relationship: Armenian Center for National and International Studies (ACNIS) in 2005⁸ and Caucasus Barometer Dataset (2009-2013). The analytical report by ACNIS, entitled “The Armenian Genocide: 90 Years and Waiting,” involves polling questions that are related only to the Armenian Genocide. The Caucasus Barometer (CB) is an annual survey with a more general dataset and involves several socio-economic dimensions for the three South Caucasian countries. In particular, it involves a limited number of questions for Armenians concerning the Armenia-Turkey relationship.

The current poll is aimed at facilitating discussions pertaining to the 100th anniversary of the commemoration of the Armenian Genocide. Nevertheless, the scope of the study is general enough to address the all essential aspects of bilateral relations. When applicable, we compare the new results with those in ACNIS, carefully noting the differences in question-statements and options in terms of suggested answers. Moreover, certain questions are directly taken from the Caucasus Barometer to the new public poll's questionnaire in order to compare results and disclose the dynamic change of people's attitude towards certain aspects of the Armenian-Turkish relationship. Overall, comparing the new results with those from two above-mentioned datasets will hopefully provide insights as to how patterns have changed in the last 5-10 years. *Section two* discloses respondents' overall interest in and awareness of the bilateral relationship. The awareness of the relations, sources of information and the areas/context of interests for respondents are explored. *Section three* studies the potential for the regulation of Armenian-Turkish relations. In particular, the role of preconditions in opening the border is analyzed. Also, the influence of the normalization on the issues, towards which Armenia is most sensitive (such as the recognition of the Armenian Genocide by Turkey, resolution of the Nagorno-Karabakh

⁷ Caucasus Barometer is the annual household survey (for the period 2004-2013) about social economic issues and political attitudes conducted by CRRC. The dataset is an open source and can be downloaded from <http://caucasusbarometer.org/en/datasets/>.

⁸Armenian Center for National and International Studies (ACNIS), has conducted Public Opinion Poll among 1900 citizens from Yerevan and all Armenia about the Armenian Genocide. Summary statistics can be found in <http://acnis.am/old/pr/genocide/Socio13eng.pdf>.

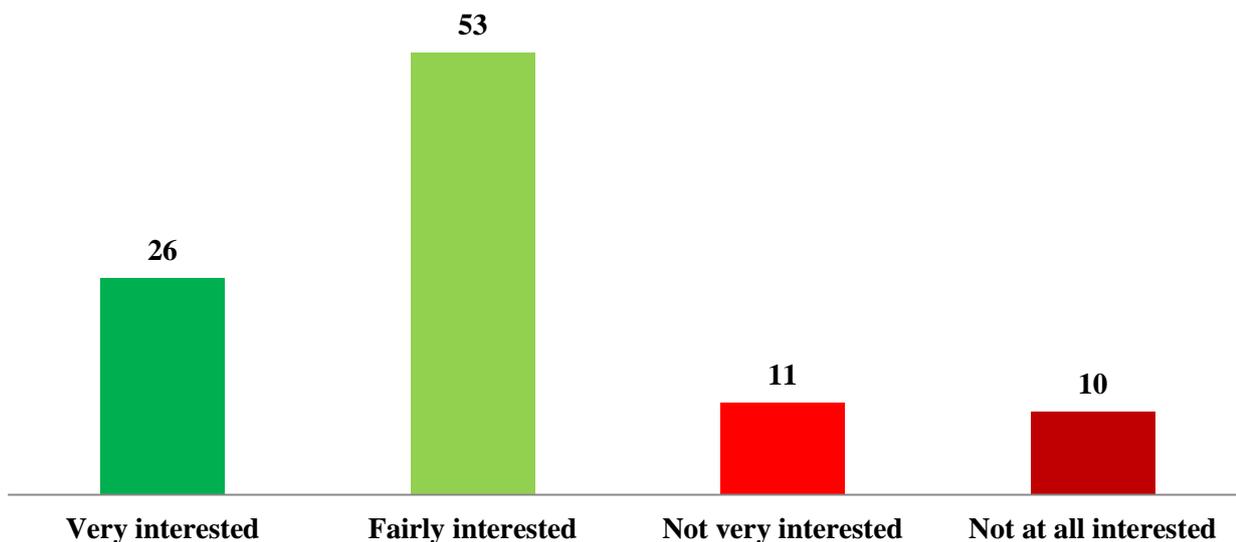
conflict and the development of the Armenian economy, among others⁹), are studied. *Section four* aims to disclose Armenians' attitude towards Turks and the Republic of Turkey's official position on problematic issues. Trust towards Turks in business and other social (familial) interactions is explored. The findings are compared with those from the Caucasus Barometer dataset. Recognition of the Armenian Genocide and Commemoration Behavior is explored in *section five*, while *section six* further sheds light on the potential of the normalization relations by trying to find which sectors the public believes Armenia should establish relations with Turkey or what the next steps should be for Armenia and Turkey towards the normalization. Importantly, the impact of Azerbaijan on the Armenian-Turkish relations is further studied.

Technical note: All the charts and tables in the report reflect the valid percentages (unless noted otherwise) and don't include "don't know" and "refuse to answer" options. In the cases where the respondents could choose more than one answer, the percentages do not add up to a 100; it is driven by the specificity of the analysis and is not a mistake. Numbers presented in the analysis may differ slightly from the numbers in the charts and tables, resulting from rounding up numbers. In some cases smaller numbers are excluded to avoid clutter in the presentation of the data.

2. Awareness of Armenian-Turkish Relations

Expectedly, respondents are quite interested in the normalization of the official Armenian-Turkish relations. In particular, 79% of the total number of respondents are fairly or very interested (Figure 2.1). There is, however, a substantial difference between men and women: while both groups are similar in terms of the general interest in normalization, 32% of men are very interested, while only 23% of women express the same level of interest. Moreover, the strength of interest increases with age: only 20% of the respondents between the ages of 18-30 are very interested, while 31% of the respondents over the age of 60 have expressed the same interest (Annex, Figure 7).

Figure 2.1. Are you interested in normalization of the official Armenia-Turkey relations?



The interest in normalization increases with the level of education (see Annex 1, Figure 8) – the fraction of the respondents who are very interested in normalization is the lowest among the respondents with (at most) an incomplete secondary education (20%) and it is the highest among the respondents with (at least) higher education (32%)¹⁰. The same analysis is conducted for regions¹¹ bordering Turkey versus regions with no

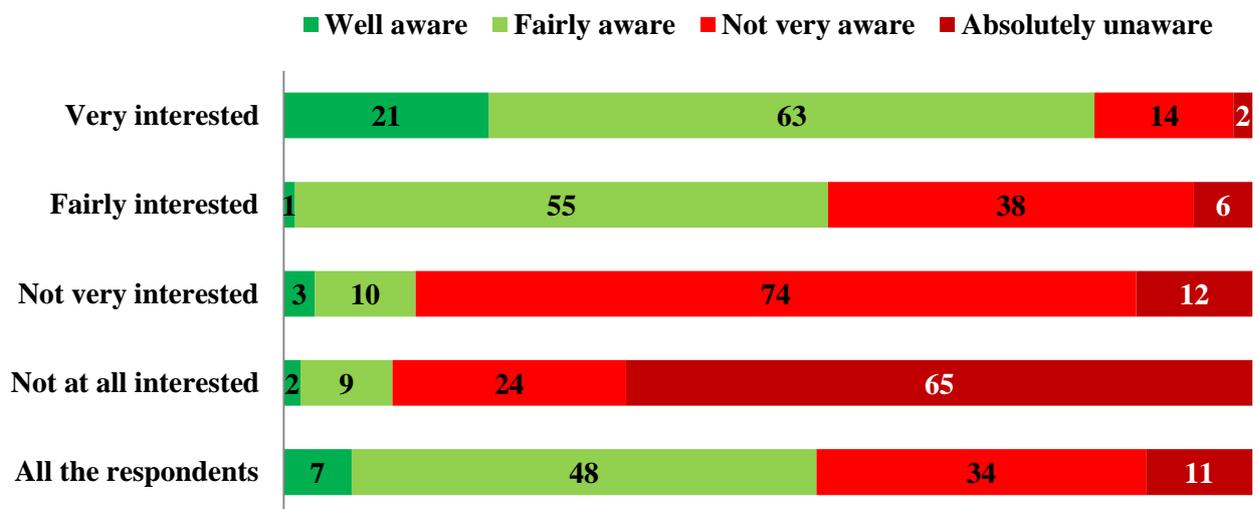
⁹ There are 18 areas specified in this particular question, both country and region specific.

¹⁰ The change of the pattern among educational categories is significant.

border with Turkey. As Annex 1, Figure 9 indicates, there is a (significant) difference between respondents' interest in normalization of the Armenian-Turkish relation in the two regions: overall, respondents in regions bordered with Turkey are more interested in normalization. 32% of the respondents living in bordering regions are very interested, while the fraction of such respondents in regions without a border with Turkey is 24%.

It is useful to explore the awareness of respondents about the Armenian-Turkish relations in connection with their interest. Armenians in the sample seem to be less aware of the relationship compared to their interest: 55% of respondents are fairly or well aware of the relationship while 79% are fairly or very interested in it. The interesting question that emerges is whether, in general, those who are more interested in Armenian-Turkish relations are also more aware of the conflict, presuming that a stronger interest may motivate an increased awareness. Such a positive relationship is indeed observed in Figure 2.2.

Figure 2.2. The relationship between interest and awareness of the Armenian-Turkish relations



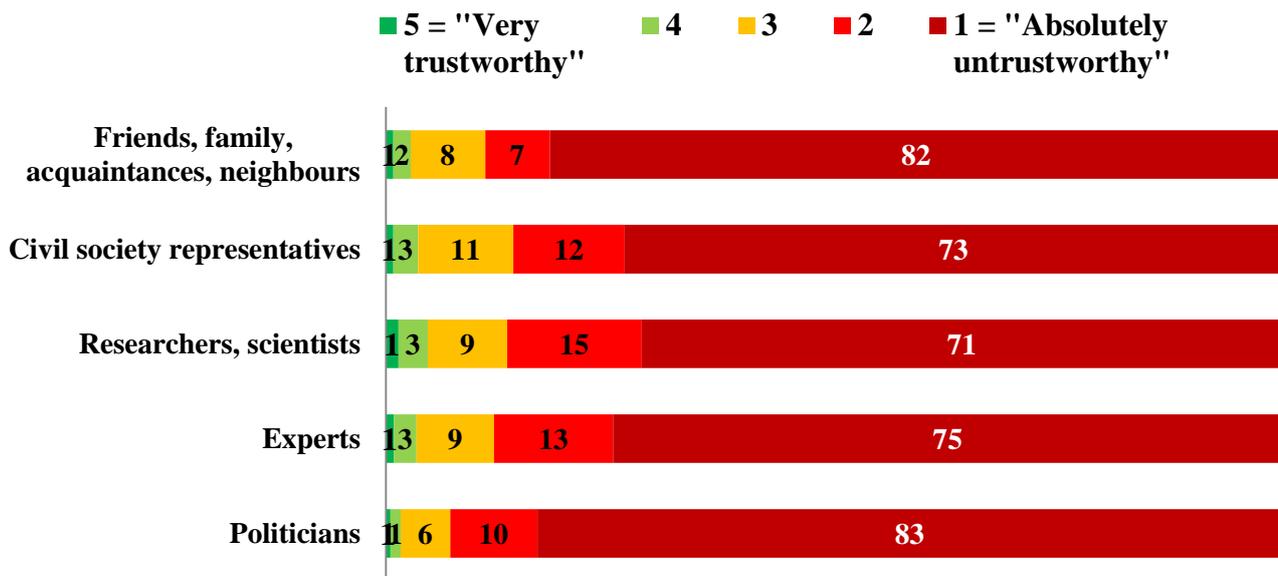
A significant majority of respondents (73%) stated that they obtained their information regarding the Armenian-Turkish relationship from television programs, while 23% said that the Internet was their main source of information. 65% of the respondents between the ages of 18-30 often use television as a source of information, while this share jumps to 75-76% for respondents in the other age categories. Internet is a quite common resource among the respondents between the ages 18-30 (44%), while only 8% of the respondents above 60 use Internet to get information on the subject.

On average, respondents value the opinions of their friends, families, acquaintances and neighbors (henceforth social network) about the Armenian-Turkish relationship, on average, as much as the opinions of professional entities operating in Armenia, such as researchers/scientists, experts and, to a lesser extent, civil society representatives. Interestingly, respondents do not find the opinions of Armenian politicians very valuable – only 16-17% consider their opinion very trustworthy (Annex 1, Figure 10).

The trust is much weaker towards opinions coming from similar entities in Turkey. 83% of the respondents believe that the opinions of Turkish politicians are *absolutely untrustworthy*. The share of respondents perceiving the opinions of Turkish experts, researchers/scientists and civil society representatives *absolutely untrustworthy* was 73%. The distrust of Armenians regarding the opinions of their social network in Turkey is almost as high as that towards Turkish politicians, 82% (Figure 2.3). This indicates the weak confidence that Armenians display towards the diverse entities representing the Turkish community, ranging from civil society representatives and researchers to friends/acquaintances (if any) and experts.

¹¹ An administrative region in Armenia is called Marz.

Figure 2.3. With regards to Armenia-Turkey relations, whose opinions do you trust most in Turkey?



When asked “What interests you the most in the information about Armenian-Turkish relations?”, with up to 5 answers possible, the recognition of the Armenian Genocide was mentioned as a central component by 85% of the respondents (Figure 2.4). Opening the Armenian-Turkish border is the second (51%), while Turkey’s influence on the resolution of the Nagorno-Karabakh conflict is the third (32%).

Figure 2.4. What interests you most about the Armenia-Turkey relations? (up to five answers were possible)

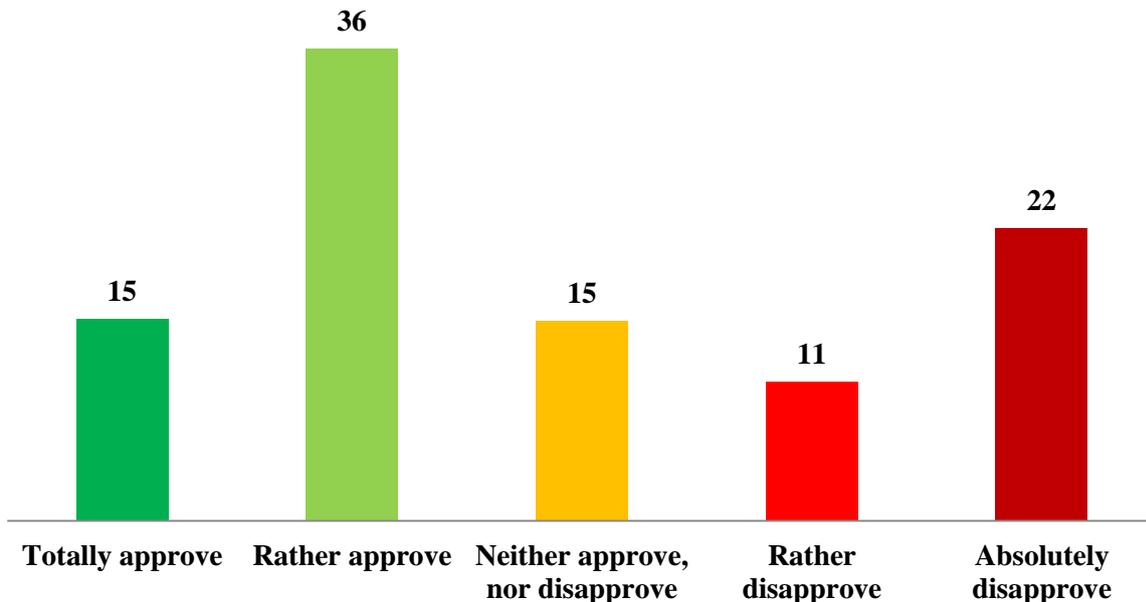


3. Regulation of Armenia-Turkey Relations

As stated earlier, in 1993, Turkey unilaterally closed its land border with Armenia, and all forms of official diplomatic contacts were terminated. Currently, the regulation of bilateral relationship is directly connected to the opening of the border. For this reason, the survey involves several questions addressing the issue. Sixty eight percent of respondents answered the question “Who initiated the Armenia-Turkey border closure?” correctly. Furthermore, 25% of the responses thought that the closure of the Armenia-Turkey border was initiated by both countries. The share of respondents who responded correctly to the above question increases with age: 75% of the respondents above the age of 60 answered correctly (Turkey), while 54% of the respondents between the ages of 18-30 provided the correct answer.

Respondents express a somewhat polarized opinion on the opening of the border¹². As Figure 3.1 indicates, while 51% of respondents *totally (15%) or rather approve (36%)* the opening of the border, 33% *absolutely or rather disapproves* it. There is a relatively small fraction of respondents between the two picks, suggesting that the Armenian society is not very uniform when it comes to their attitude towards the opening of the border.

Figure 3.1. To what extent do you approve of opening the border between Armenia and Turkey?



Respondents are also asked to disclose their attitude towards the opening the border, when the factor of no-preconditions is explicitly stated. The question “To what extent do you approve the opening of the Armenia-Turkey border without any preconditions?” is asked only to the respondents, who *totally approved, rather approved or neither approved* the border opening, when preconditions are not mentioned at all. The alternative question, “To what extent do you approve the opening the Armenia-Turkey border with preconditions?”, is asked to the same categories of respondents (positively and neutrally disposed). Importantly, for the last two questions selected respondents are asked to choose an answer from the same set of options, as the one from the question, in which preconditions are not mentioned at all. As the data on the Table 1 show, in general, the factor of preconditions, with or without, brings more disapproval. The interesting fact is that the disapproval and neutrality (*absolutely disapprove, rather disapprove or neither approve, nor disapprove*) is much lower in the case of without preconditions (43.3%) than that in the case of with preconditions (91.1%).

¹² Respondents have been asked “To what extent do you approve of opening the border between Armenia and Turkey?”.

Table 1. To what extent would you support opening the border with Turkey?

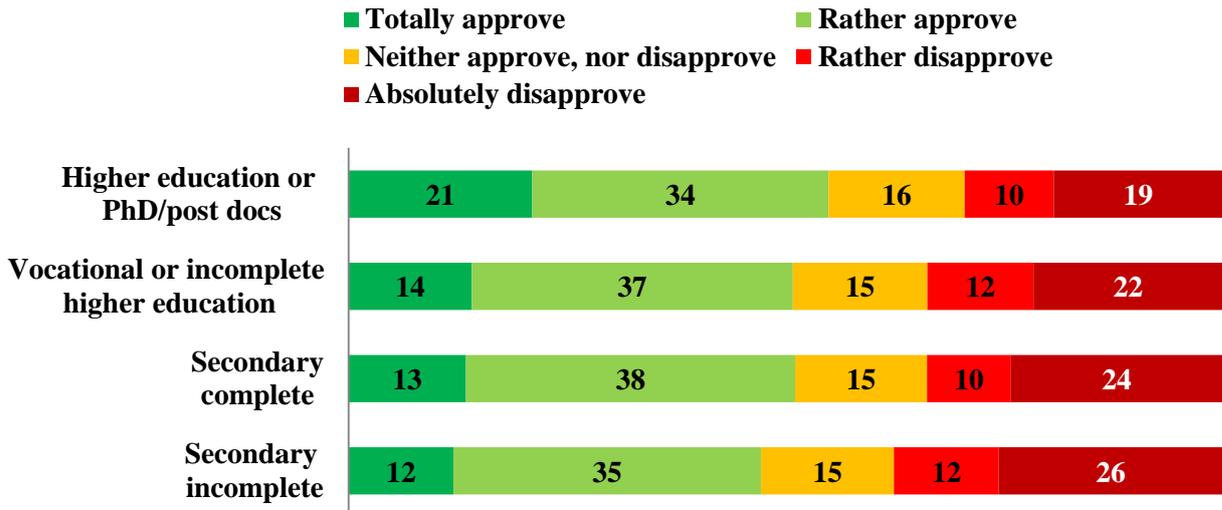
	Q7. In general, Arm-Turk (n=1164)	In general, CB2010 (n=1922)	Among those who are neutral and/or positive regarding the idea of opening, %		
			with no preconditions		with preconditions
			Q8 Arm-Turk (n=786)	CB 2010 (n=1088)	Q9 Arm-Turk (n=562)
1	2	3	4	5	6
Totally approve	15.2	15.5	24.7	26.0	0.7
Rather approve	35.5	26.0	24.8	29.0	2.1
<i>Subtotal for positively disposed</i>	<i>50.7</i>	<i>41.5</i>	<i>49.5</i>	<i>55.0</i>	<i>2.8</i>
Neither approve, nor disapprove	15.0	12.1	15.3	20.2	8.2
Rather disapprove	10.5	12.4	13.0	8.8	8.9
Absolutely disapprove	22.0	30.6	15.0	10.4	74.0
<i>Subtotal for negatively and neutrally disposed</i>	<i>47.5</i>	<i>55.1</i>	<i>43.3</i>	<i>39.4</i>	<i>91.1</i>
Don't know	1.8	3.2	7.3	5.7	6.0

In 2010, the Caucasus Barometer survey had asked “*To what extent would you support or oppose the opening the Armenia-Turkey border?*”. It was worthwhile to observe whether there was a change in attitudes within the last four years. Annex 1, Figure 11 displays the histograms for the variable from the two dataset. Interestingly, the fraction of the respondents disapproving the opening of the border in 2014 (33%) was notably less than in 2010 (45%). Disapproval of the opening the border without preconditions is however slightly larger in 2014, 43.3% versus 39.4 in 2010, Caucasus Barometer (Figure 3.1).

When exploring the relation between the approval of the opening of the border and the level education, we have found a positive correlation (see Figure 3.2), although the overall pattern change has not been significant¹³. Nevertheless, when comparing the *totally approval* rate of respondents with the highest and the lowest education categories, the difference has been observed at more than 9% (21% and 12%, respectively).

¹³ The P-value of the Pearson Chi squared statistic is 0.371.

Figure 3.2. Approval of the border opening by educational level of respondents



Finally, when checking the approval rate against the regions’ vicinity to the border with Turkey, we observe that respondents in regions that border Turkey are more interested in opening the border than respondents in regions that do not share a border (Figure 3.3)¹⁴.

Figure 3.3. Approval of the border opening by type of settlement of respondents

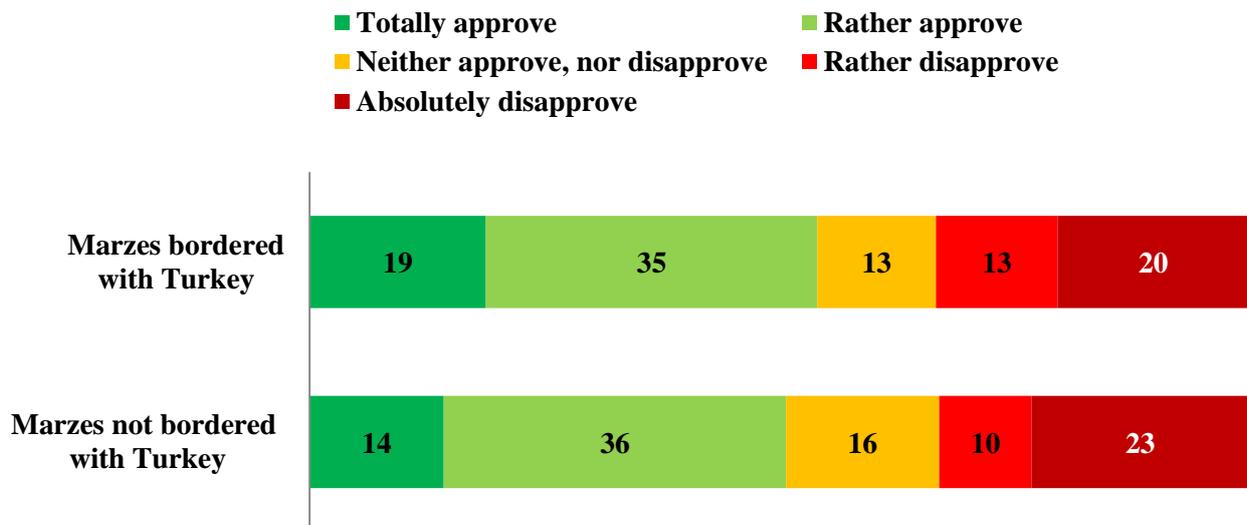


Table 2 shows that people in Armenia are continuously optimistic in assessing the potential impact of opening the border. For example, in 2014, 64% of people (61% in 2012) stated that they believe that opening the border with Turkey will have a positive impact on the economy. Moreover, the current Armenia-Turkey survey (2014) reflects that less people believe in the damage from opening the border on the economy, politics or security.

¹⁴ The difference for the “very interest” category constitutes 7.6% and the overall pattern change is significant at 10% level.

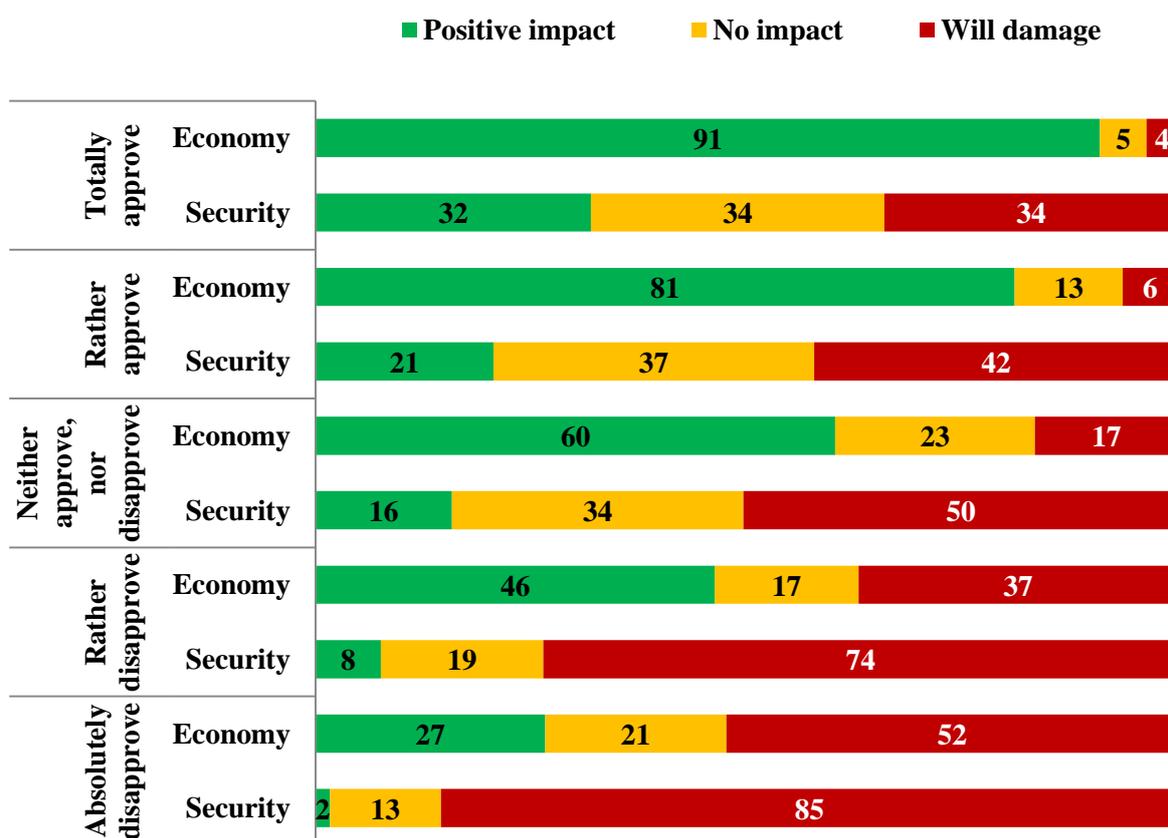
Table 2. The impact of opening the border between Armenia and Turkey will affect Armenia's:

Comparative evidence from Armenia-Turkey 2014 survey and Caucasus Barometer 2012 datasets.

	Economy		Internal Politics		National Security	
	Arm-Turk	CB 2012	Arm-Turk	CB 2012	Arm-Turk	CB 2012
Will damage	21%	33%	37%	53%	57%	64%
No impact	15%	6%	40%	16%	28%	16%
Positive impact	64%	61%	23%	31%	15%	20%

Next we observed whether those in favor of opening the border value economic relationships. We also wanted to explore whether those who oppose opening the border are more concerned with non-economic factors (security), such as the Genocide and the Nagorno-Karabakh conflict.

If this is the case, then the fraction of respondents with a strong approval towards the opening of the border should outnumber the fraction with absolute disapproval, particularly when it refers to the impact on the economy. Also, the opposite pattern is expected when it refers to the impact of the opening of the border on security (Figure 3.4).

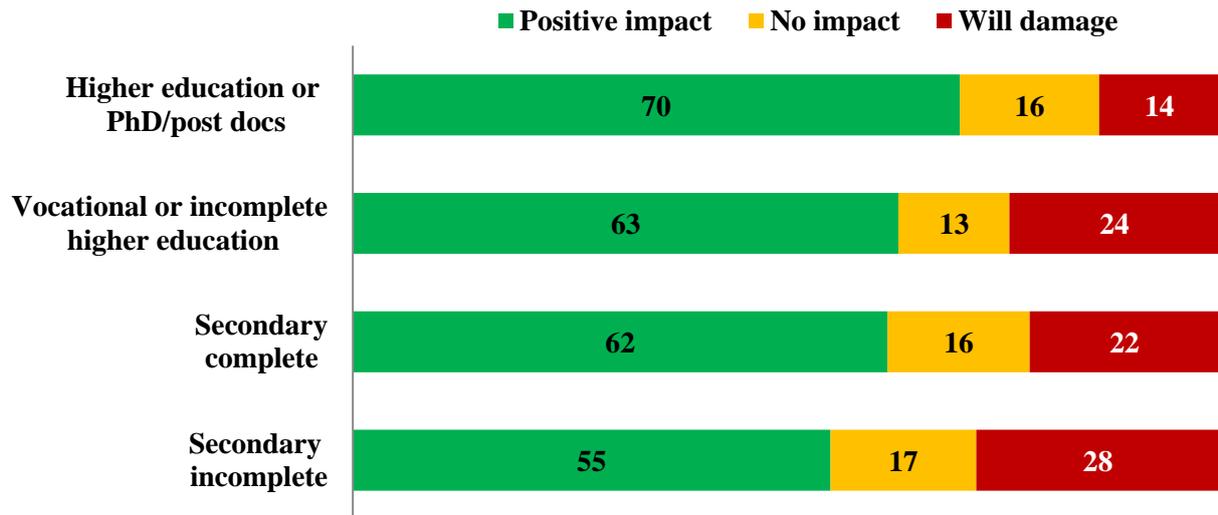
Figure 3.4. Opening of the border and the perceived level of its impact on the economy and security

The impact of normalization of the Armenia-Turkey relations on the economic, security-related and other areas in both countries, on the other hand, is considered to be quite positive. Still, there is a large fraction of respondents who believe that the normalization will not bring any significant change.

Further analysis on the impact of the opening of the border on the economy shows that the expectation of a positive impact is more frequently observed among more educated respondents (Figure 3.5). The significance of the positive correlation is very strong¹⁵.

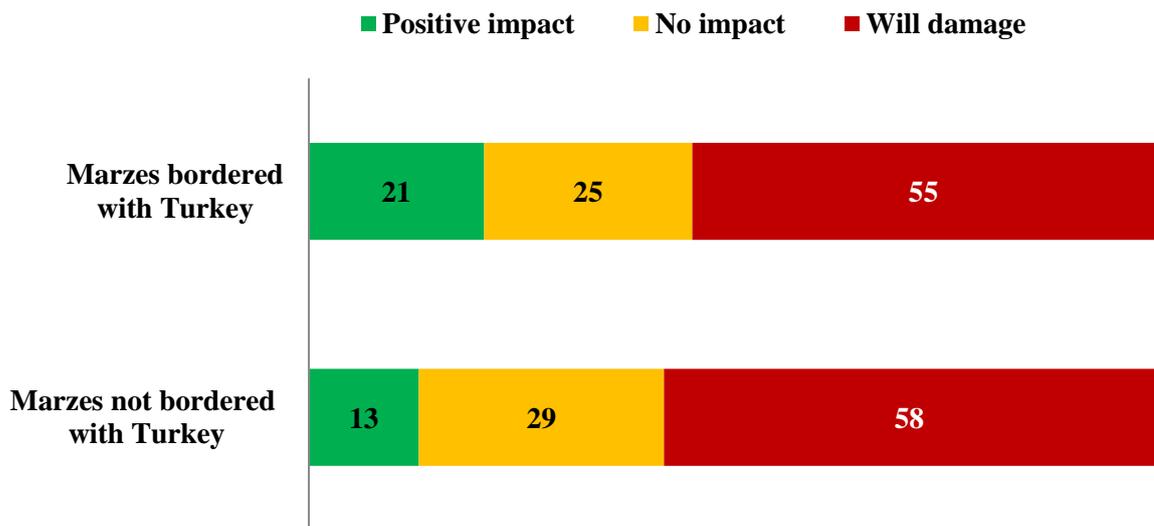
¹⁵ The P-value is 0.016.

Figure 3.5. Attitudes on the impact of the border opening on the economy by education of respondents



Interestingly, the data show that those living in the regions bordered with Turkey are more likely to believe that opening the border will have a positive impact on security compared to respondents residing in regions that do not share a border with Turkey (Figure 3.6).

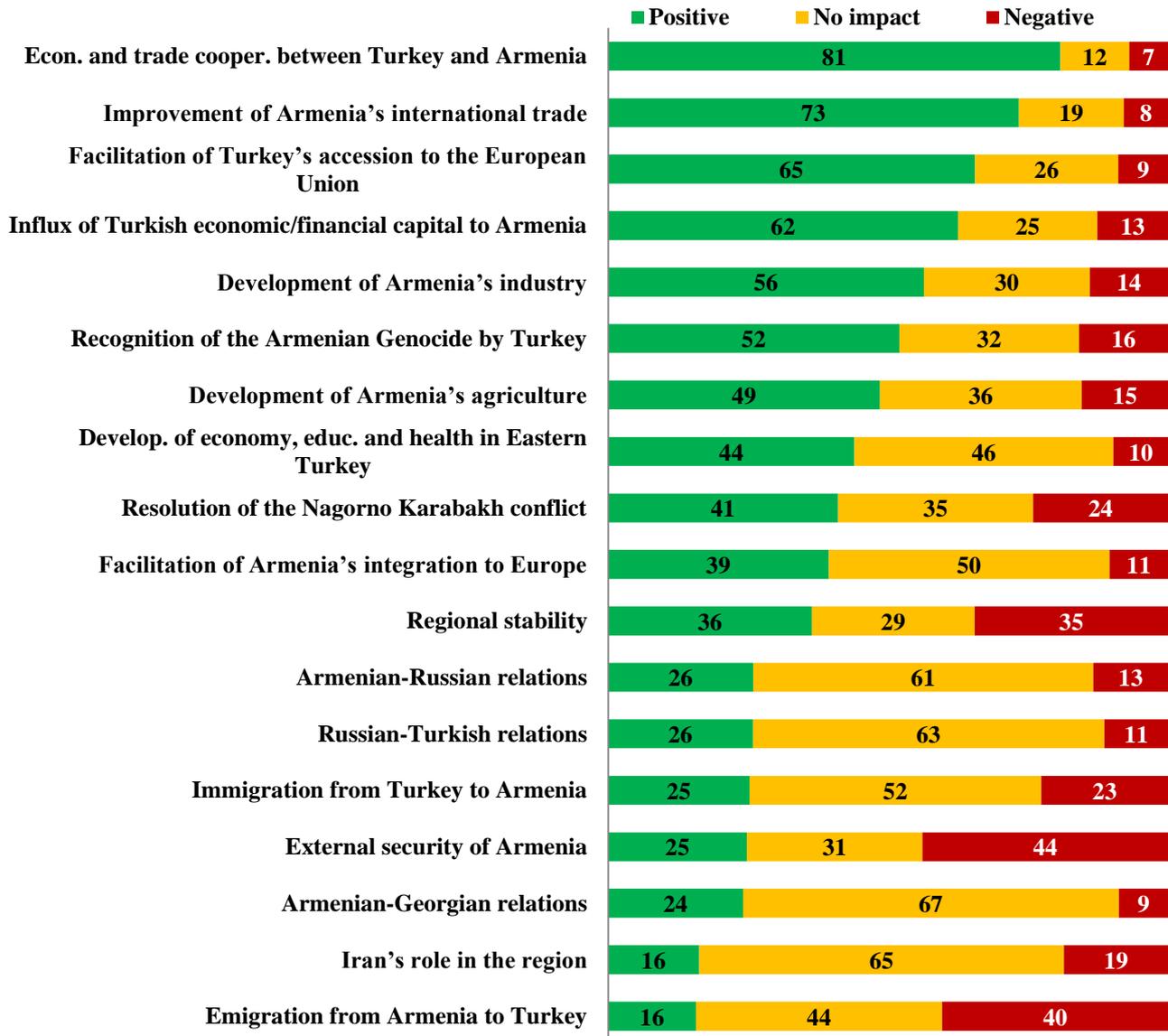
Figure 3.6. Opening the border and its impact on the security: differences by types of regions



In terms of attitude towards the economic impact of opening the border with Turkey, our findings do not indicate a significant correlation between regions who share a border and regions that do not. Also, a significant difference in the attitudes of respondents regarding the impact of the opening of the border on security based on their educational level has not been found.

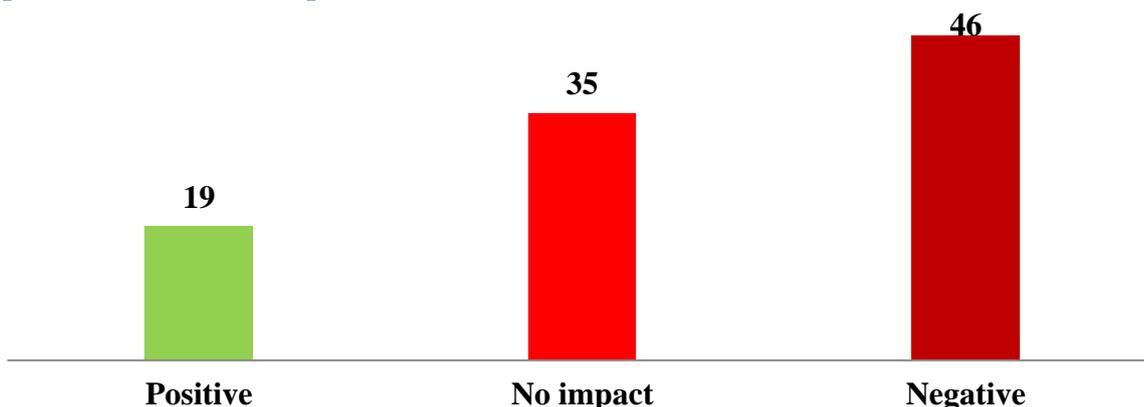
Concerning the possible effects of the normalization on a number of current processes, Figure 3.7 indicates that the economic and trade cooperation between the countries, as well as the general international trade for Armenia, will be significantly affected by the normalization of Armenia-Turkey relations. In general, economic factors are in first place on the figure, though the Genocide and the Nagorno-Karabakh conflicts are largely considered to be influenced by normalization.

Figure 3.7. The influence of the normalization of Armenia-Turkey relations on the following:



As mentioned above, in 2009, Armenia and Turkey signed the Armenian-Turkish protocols in Zurich, October 10, 2009. Respondents were asked about their awareness of the protocols' content. 58% of the respondents were not aware of the content and only 2% have read the protocols. However, a significant portion of respondents (46%) stated that the suspension of the processing protocols is a negative phenomenon and only 19% find something positive in the suspension (Figure 3.8).

Figure 3.8. Attitudes regarding suspension of Armenia-Turkey protocols signed in 2009 to establish diplomatic relations and open the border

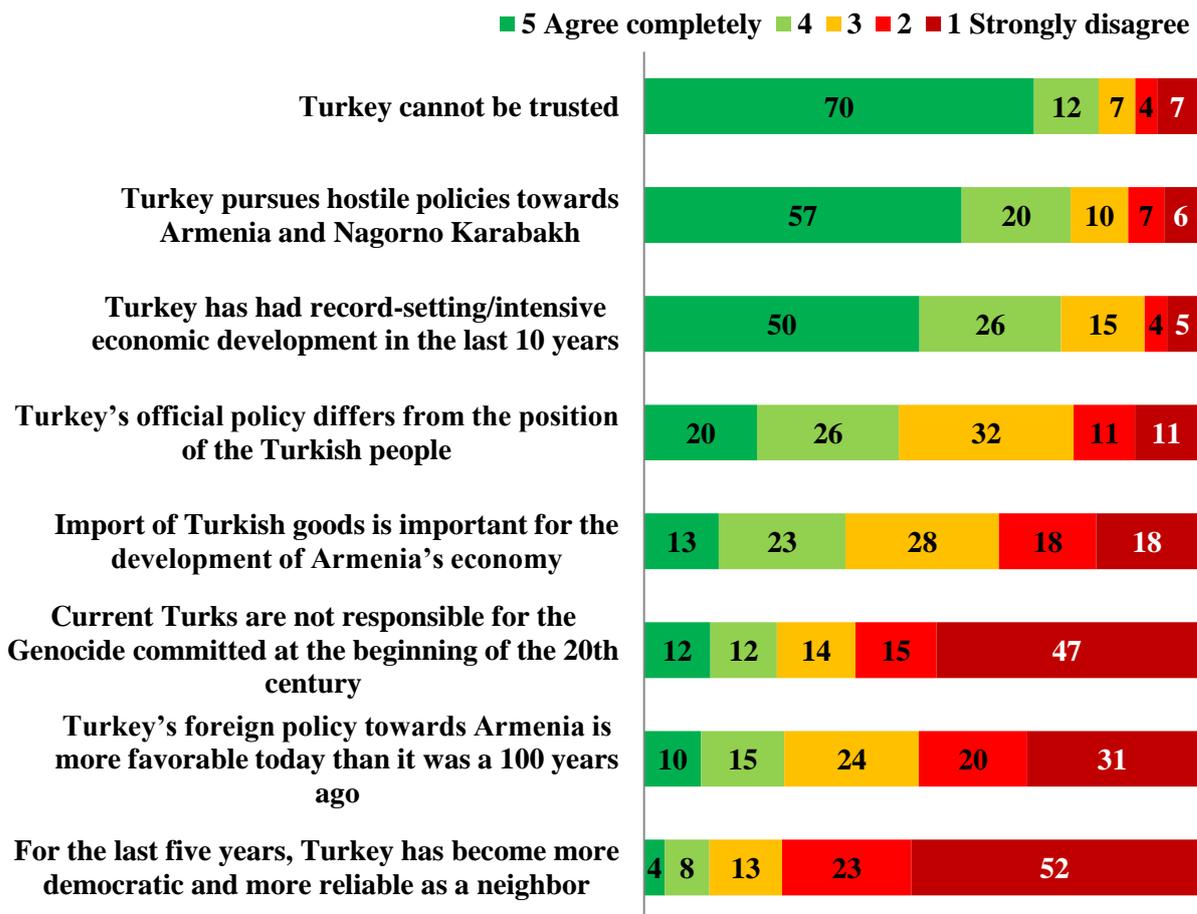


4. Attitudes towards Turkey

The next set of questions aims to disclose Armenians’ attitudes towards the neighboring country. They start by exploring to what extent respondents are familiar with Turkey. Out of 1162 respondents, 13% have had interactions with Turks and 6% have been in Turkey. The main purpose of these respondents’ visits to Turkey was tourism (leisure) by 47%, while the second purpose (25%) was trade. The vast majority of Armenians, 80%, use Turkish products. The use of Turkish products is less among older respondents (over the age of 60) - 67%. The average attitude towards the import of Turkish goods is neutral¹⁶.

Figure 4.1 provides answers for several questions about respondents’ attitude towards the Turkish community and possible interactions. According to the survey, Turkey’s official position is not directly perceived to be the same as the opinion of Turkish citizens. Such a diverging attitude is also observed for the relevance of Turkish imports for economic development in Armenia. Still, the vast majority of respondents completely agree that Turkey cannot be trusted and it pursues hostile policies towards Armenia and Nagorno Karabakh, indicating that certain areas of relations continue to be complex and reconciliation of the societies requires intensive, long-term efforts. Half of the respondents completely agree that Turkey has been experiencing economic development in the last 10 years.

Figure 4.1. To what extent do you agree with the following statements regarding Turkey and Turkish people?

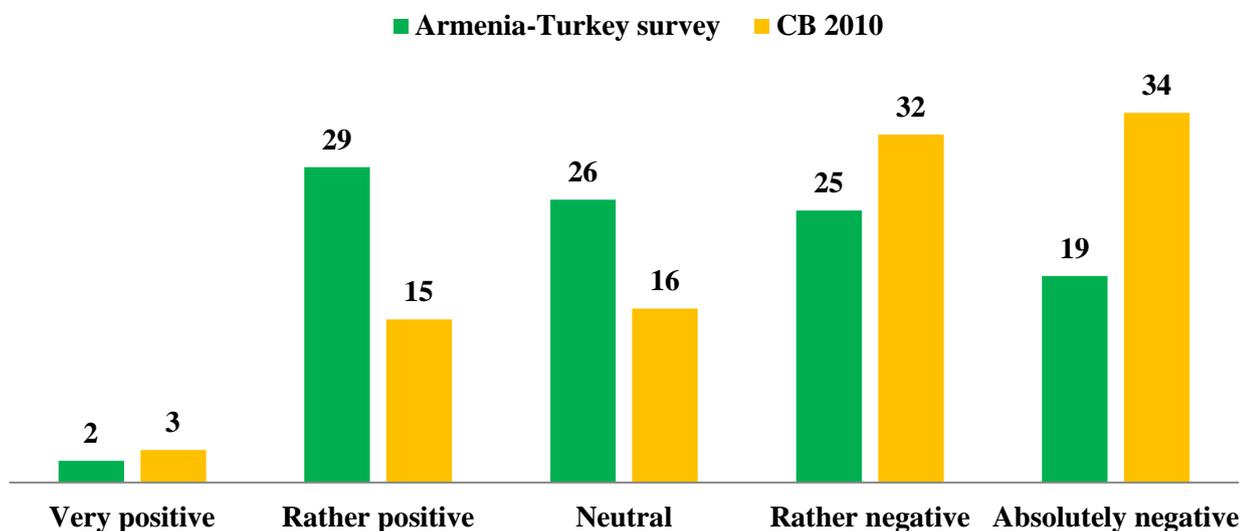


It is interesting to explore what Armenian respondents think about the overall attitude of Turkish people towards Armenians. The same question was asked in 2010 in the Caucasus Barometer survey. Despite the relatively short time period, there is a significant change in Armenians perceptions concerning the issue. More

¹⁶ When ranking the attitude from 1=very negative to 5=very positive, and calculating the weighted mean of the attitude variable, we obtain 3.086. The neutral attitude corresponds to the value 3.0.

than 30% of respondents in 2010 regarded Turkish people's attitude towards Armenians as absolutely negative, while less than 20% of respondents within the current survey responded in the same way¹⁷. Accordingly, the shares of respondents with neutral and rather positive opinion about Turkish people's attitude towards Armenians were higher in 2014. The findings can be seen in Figure 4.2.

Figure 4.2. Perceptions regarding the overall attitude of Turkish people towards Armenians



Annex 1, Figure 12 compares Armenians' attitude towards business relationships and marriage between Armenians and Turks. There seems to be a slight change in the positive opinion from 2010 to 2014, towards approval for business relations (from 56% in 2010 to 60% in 2014), while the approval rate of mixed marriages has declined (from 8% in 2010 to just 5% in 2014).

Armenians' attitude towards Turkey's possible membership of the European Union has changed positively. According to the Caucasus Barometer, in 2010, 46% of respondents expressed an absolutely negative attitude, while the data from the current survey show that in 2014 only 28% of Armenians have the same stance (see Annex 1, Figure 14). Correspondingly, the neutral attitude has increased from 26% in 2010 to 45% in 2014. We also looked at the dynamic pattern of Armenians' opinion concerning preconditions that should be set for Turkey in order to join the European Union. In the last two years, the overall pattern has not changed (see Annex 1, Figure 15).

5. Recognition of the Armenian Genocide and Commemoration Behavior

In 2015, Armenia commemorates the 100th anniversary of the Armenian Genocide. Given this fact, the dataset includes a section about the Genocide, concentrating on knowledge, recognition, and the commemoration behavior of Armenians.

Approximately 85% of the respondents had first heard about the Armenian Genocide by the time they were below 11 years old (36% of them heard about it before the age of 7 and 47% - between 8 and 11)¹⁸. Seventy percent of the respondents reported that they learned about the Genocide from their families and 62% of

¹⁷ Respondents in the Caucasus Barometer 2010 survey are not the same individuals as respondents in our dataset. Meantime the sampling methodology and the area coverage was absolutely the same, which makes the dynamic analysis quite complete.

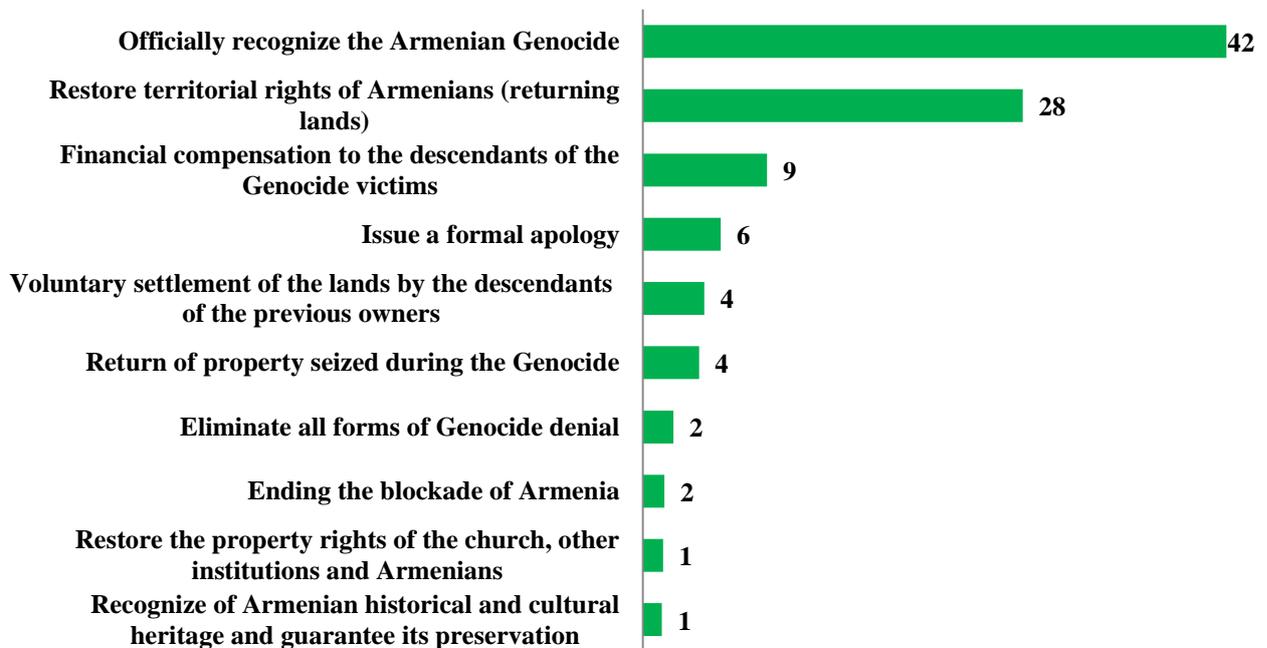
¹⁸ The answers to the same question asked within the survey conducted by ACNIS in 2005 among 1900 respondents in Armenia were distributed as follows: 38.6% could not remember when they have first heard about the Armenian Genocide, 24.2% were aware on it below their age of 7, 18% - between their 8-11, and another 14% - between their 12 to 17 (see more at <http://acnis.am/old/pr/genocide/Socio13eng.pdf>, p 4).

respondents learned about it in schools¹⁹. It is worth mentioning, that 54% of the respondents reported that they have ancestors suffered from the Armenian Genocide. The share of such respondents interviewed within CB 2012 and ACNIS 2005 surveys was about 48% (see Annex 1, Figure 16). Eighty seven percent of the respondents stated that they participate in Armenian Genocide commemoration events (e.g., visit Tsitsernakaberd), 27% of them reported to do so every year.

There are several suggested answers for the question “Why do you think genocides happen?” According to these answers, the most popular (about 40%) is that “the majority nation wanted to establish a nation state and minority nations were fighting for independence and generating a counter-reaction.” The second popular answer (39%) was that “politicians of ethnic majorities built hatred toward the ethnic minorities.” 96% of the respondents confirm that, if the Armenian Genocide was recognized, they would approve of the Armenian Government and/or Diaspora pushing for reparations.

Respondents were asked to rank the offered possible types of reparations from the highest (1) to the lowest (10) priority. Figure 5.1 reflects that the official recognition of the Armenian Genocide is the highest priority action by Turkey for 42% of respondents. The next action with a remarkable share (28%) is to restore territorial rights of the Armenians (returning lands).

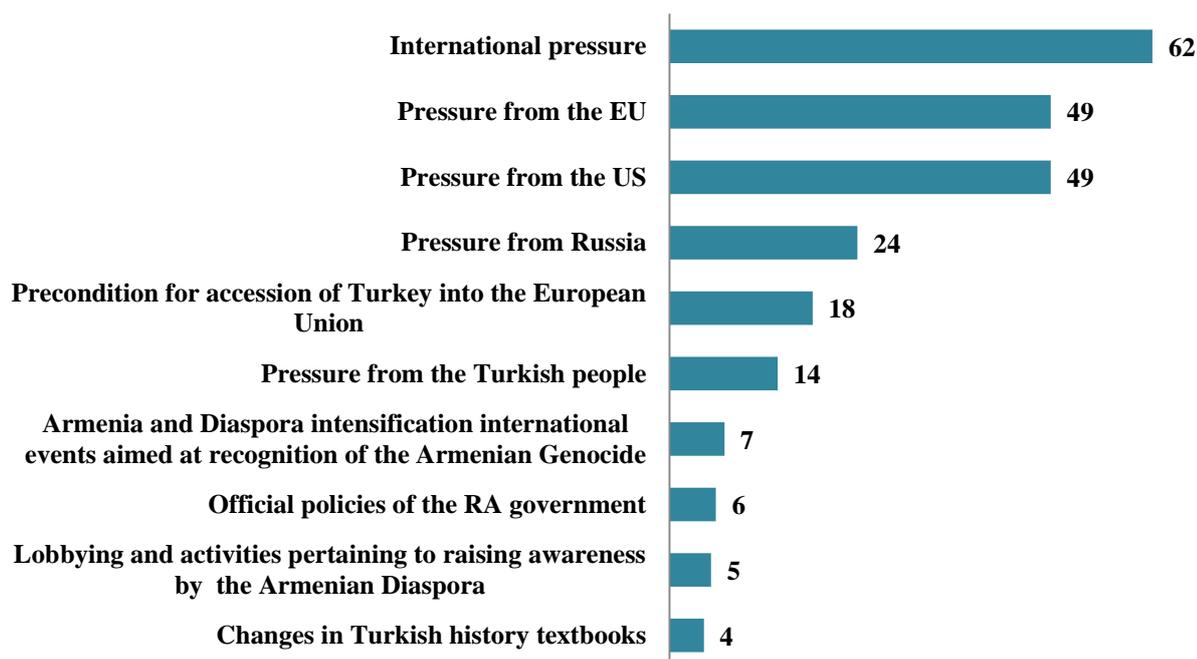
Figure 5.1. What kind of reparation do you expect Turkey to pay? (first most mentioned answers)



The next question is “what will make Turkey recognize the Armenian Genocide?” Again, answer-statements were suggested with a request to mention the three most important ones. Figure 5.2 summarizes these findings. Interestingly, Armenians have little belief that the Armenian Government or Diaspora can be successful in pushing Turkey towards Genocide recognition. Instead, international pressures, such as a precondition for the accession of Turkey to the European Union, or by distinct states (such the US and Russia), can be more successful in Turkey’s recognition of Armenians’ Genocide.

¹⁹ Respondents were allowed to select up to two answer options out of ten, including activities of Diaspora. While considering all the selected options as 100%, it comes out that 45% of answers are for the “family” option, 39.7% - for “school”, 5.2% and 5.3% - for films and literature, respectively.

Figure 5.2. In your opinion, what will make Turkey recognize the Armenian Genocide? (up to three answers)



Respondents were asked if they believed it was possible for Turkey to recognize the Armenian Genocide in the next 5-10 years. 65% of respondents found such a scenario either absolutely or rather impossible, while only 9% of them found it quite possible.

6. Armenia-Turkey Rapprochement Issues

In this section there are few questions on the channels of and challenges in the rapprochement of the Armenia-Turkey relationship. The poll revisits the role of preconditions and/or parallel actions from the Armenian side in the normalization process. The majority of the respondents (55%) agree to establish relations while also pursuing the recognition of the Genocide. Seventeen percent of the respondents are for establishing a relationship with preconditions, such as the recognition of Nagorno-Karabakh and ending the blockade by Turkey (see Annex 1, Figure 17). The picture does not change much with age and gender composition.

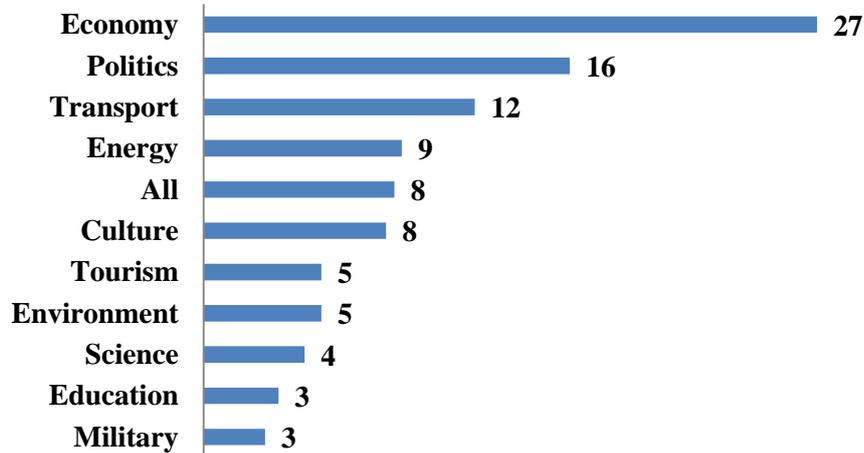
Respondents are also asked in which sectors Armenia should establish relations with Turkey (see Annex 1, Figure 18). Consistent with other findings from this poll, economic relations are of high priority (62%). The next sector is politics, by 37%, signaling that respondents are well aware of the central role of politics in shaping, or at the very least, crucially affecting all other areas of Armenian-Turkish relations. Interestingly, almost one-fifth of respondents see the possible establishment of a relationship in *all* areas.

A similar question had been asked to the respondents in the public poll conducted by ACNIS (2005): *What kind of relations should Armenia establish with Turkey?* The options (with corresponding shares of respondents that chose the particular option) were Diplomatic (45.6%), Economic (21.9%), Cultural (1.4%), Military (2.1%), Comprehensive (12.1%), None (14.8%) and Difficult to answer (2.4%). If we compare these two questions²⁰ by focusing on two distinct suggested options, “Economy” and “Politics” from the Armenia-Turkey survey database and “Economic” and “Diplomatic” from the ACNIS (2005) database respectively, then the key observation is that, unlike in 2005, respondents of contemporary Armenia value economic relations more than diplomatic relations. The comparison, however, should take into account that multiple answers were possible in the recent poll, while options in ACNIS (2005) were mutually exclusive. Additionally, the importance of cultural relations has grown dramatically, from 1.4% (ACNIS) to 8% (current survey, if calculated as share of all the responses).

²⁰ The questions are “In which sectors should Armenia establish relations with Turkey?” from the Armenia-Turkey database and “What kind of relations should Armenia establish with Turkey?” from ACNIS (2005) database.

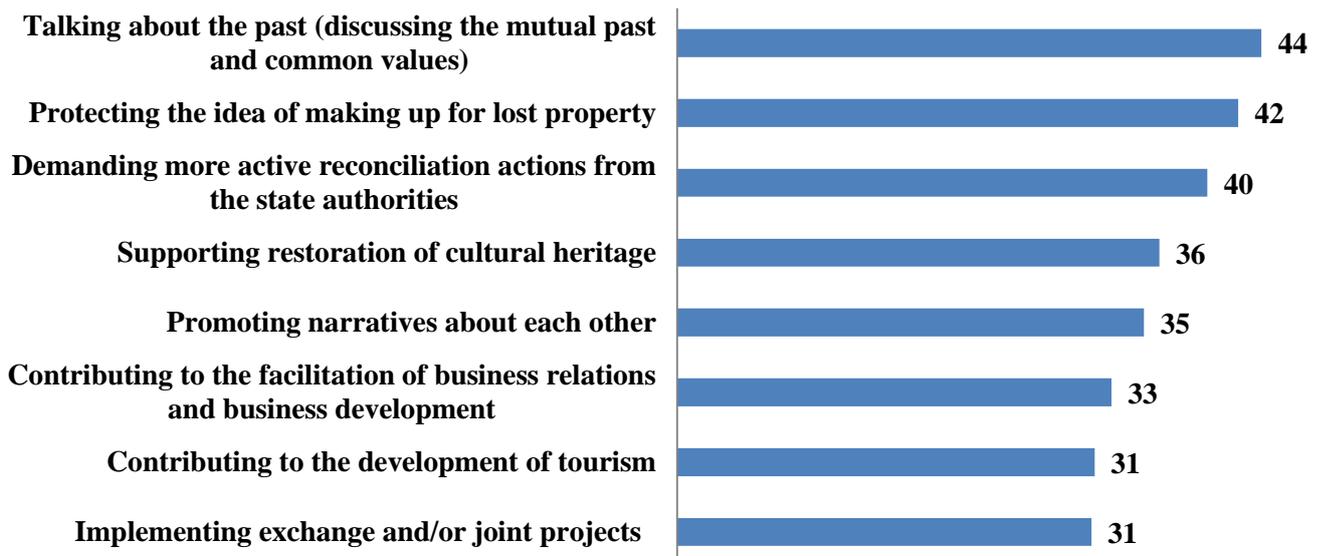
This shows that, currently, Armenians value the role of politics less and believe that economic and cultural relations are much more important. Still, there were more respondents indicating the importance of Economy than that of Politics; 27% versus 16%, if calculated as share of all the responses (Figure 6.1).²¹ Concisely, it could be argued that Armenians currently believe that economic and cultural ties are possible to develop without politics. This observation is in favor of the hypothesis that direct economic (and cultural) relations can be beneficial even without establishing diplomatic relations.

Figure 6.1. In which sectors should Armenia establish relations with Turkey? (% of all the responses)



Respondents have been asked to reflect on their attitude towards projects aimed at normalization of the Armenian-Turkish relations, which has been implemented by the civil society representatives across the borders. 56% of respondents have perceived such projects positively and 40% had a neutral attitude. This has provided strong evidence which shows that projects that have been aimed at normalization are indeed expected and can help the process. Respondents have also been asked “What civil society initiatives targeting Armenia-Turkey reconciliation would you approve of?” There have been several options and the results have been summarized in Figure 6.2.

Figure 6.2. What civil society initiatives targeting Armenia-Turkey reconciliation would you approve of? (multiple answers were possible)



Many significant components address the consequences of the Armenian Genocide, while few have a clear economic nature. For example, “contributing to facilitation of business relations and business development”

²¹ In the Annex 1, Figure 18, 62% of respondents indicate the importance of Economy, while the number for Politics is 37%. The two outcomes are generated from the same question; in Figure 6.1 we divide each category to the sum of all responses, while in Annex Figure 18 choices for each category are separately reported.

or “*contributing to development of tourism*” are among high priorities that respondents would like to see as civil society initiatives.

There is a question about the impact of Azerbaijan on the Armenian-Turkish relations. More than 80% believe that the impact is very strong, supporting the argument that the relationship between Armenia and Turkey highly depends on a third country, making the normalization process complex.

Finally, respondents were asked whether Armenia and Turkey will ever reconcile. Respondents are fairly diverse in their answers: 30% think that they will never reconcile, while 40% give some positive likelihood of reconciliation. This opens room for policy intervention to lean the population’s opinion towards a desired direction that is more uniform and representative.

Annex 1, Table 3 provides useful information about Turkish respondents’ attitude towards Genocide recognition by Turkey. According to the survey conducted by EDAM among 1508 respondents throughout Turkey in 2014, around 9% of all respondents stated that Turkey should apologize and admit the fact of Genocide. Another 9% agreed that Turkey should apologize but not take any other step, while 12% of respondents stated that should express its regret over the Armenians that lost their lives in 2015 but should not apologize. The three categories comprise 30%, while the rest of the respondents were of the opinion that Turkey should not express any specific attitude towards Armenian Genocide. Young respondents (with the age 18-34) were more open to express their apologies, while there is no significant difference between male and female. Interestingly, one fourth of the interviewed did not have any idea or did not respond to the question.

7. Major Findings and Policy Recommendations

Overall, respondents’ interest in and awareness of the Armenia-Turkey relationship are significant and fairly reflects the current reality. The general pattern is that the very interest about relations is more intense for respondents who are older, but still the majority of younger respondents who are 18–45 express at least a fair interest. Though we do not perform causality analysis, the significant association between the interest and the awareness hints at the following causality channel - respondents with a stronger interest approach to feasible information sources and increase their awareness about the Armenian-Turkish relationship.

Regarding information sources, research based findings and expert opinions were influential in shaping respondents’ views on the Armenian-Turkish relations. From the policy perspective, investment in research and expert studies in this area will help align the public opinion towards a socially efficient direction, provided that generated scientific and/or professional products will be outcomes of independent and objective research. That Armenians would rather follow researchers’ and experts’ opinions concerning the two-country relationship is a readily available resource and can be effectively utilized by policy-makers. As for the knowledge transfer process, certain policy efforts will be needed to make a sophisticated research product available to the general public. Coordinated joint initiatives between research institutions and central government entities responsible for these policies (Ministry of Foreign Affairs, Ministry of Diaspora, among others) could facilitate the process.

According to the survey results, information about the Genocide and the Nagorno-Karabakh conflict in the context of the Armenian-Turkish relations is highly valued. On the other hand, information on economic and diplomatic relationships between the countries also has high demand. Generally speaking, the potential agenda for Armenian-Turkish relations is not only rich, but also has embedded factors that are contentious, complicating the normalization process. Security issues and Genocide keep respondents away from approving normalization, while economic factors push them towards approval. The same respondent may utter for disapproval when it comes to evaluating the impact of the opening the border on security (because it will damage the country) but approve the opening when assessing its impact on the economy. Normalization without preconditions does not mitigate concerns about security, but at least may formally exclude direct correlation between the two in the officially announced policies. Clearly, the cost for a boost of economic development that Armenia expects from opening the border is well acknowledged by respondents. The Armenian-Turkish protocols, pre-signed in 2009, were supposed to effectively control the separation of the two factors.

The observation that poll participants are remarkably interested in the bilateral normalization suggests that the Armenian Government should continue to invest time and efforts towards establishing relationship between Armenia and Turkey. People acknowledge that closed borders and the absence of diplomatic relationship hinder Armenia's development. Importantly, the interest in a bilateral relationship is stronger among older respondents. On the other hand, fewer respondents above the age of 60 find the impact of the normalization on the economic development positive compared to those in all other age groups, suggesting that the interest among the old respondents is not driven by economic factors. The good news for policy makers is that the interest in normalization is high for all age groups and normative measurements can be well communicated throughout the entire society (as there are no segmentations) before implementation.

We learn to what extent the factor of preconditions affect respondents' attitude towards the opening of the border. When preconditions (with or without) are mentioned, a fraction of respondents, who approve the opening of the border without preconditions, are now against the opening. The disapproval is stronger in the case of with preconditions, suggesting that the normalization process is more acceptable for the Armenian society without preconditions.

Normalization without preconditions, however, should not infer that the Armenian Genocide and/or the Nagorno-Karabakh conflict can be disregarded in that process. Respondents' interests are rather concentrated towards these two issues when the opening of the border is in question. The complexity of the relationship makes diplomatic talks and policy moves even more complex, as it is even more difficult to distinguish short term versus long term costs/benefits for the two countries. Assuming there are no preconditions, the trade-off between economic benefits and non-economic costs is substantially mitigated as preconditions constitute the cost part of the deal for Armenia. This enables the Armenian government to enter the normalization process by largely controlling negative consequences for the society.

According to the respondents there is a distinct policy challenge concerning opening the border with Turkey. On one side, we observe that 64% of respondents think that the impact of opening the mutual border between Armenia and Turkey will affect Armenia's economy positively. On the other side, 57% of respondents express their concerns that opening the border will damage the country's security (Table 2). The ultimate impact should therefore be carefully projected by the Armenian government and properly communicated with society. The majority of respondents agreed that Turkey cannot be trusted or Turkey pursues hostile policies towards Armenia and Nagorno-Karabakh²². Still, there is a significant change in Armenians' perception about the overall attitude of Turkish people towards Armenians in the last 5 years or so. Besides, there are more Armenians who are neutral towards or in favor of Turkey's possible membership of the European Union. Also, there is a slight change in Armenians' approval on doing business or marrying with Turks. The dynamic change of Armenians' attitude towards Turks and Turkey is rather positive and this will likely influence any given normalization initiative and/or policy from Armenia and/or Turkey positively.

There is, however, one important exception. In 2014, 94% respondents from our dataset thought that the recognition of Genocide should be a condition for Turkey to join the EU, while in 2012 it was notably less - 84% of respondents from the Caucasus Barometer survey had the same opinion. Given the fact that we have two different sets of respondents, by presuming that representative samples in both cases deliver corresponding (representative) patterns, we conclude that the importance of the recognition of the Genocide for Armenians is even higher.

Armenians' attitude towards Turkey's possible membership of the European Union has improved in the last few years. In 2014, the absolutely negative attitude has been decreased by 18% relative to that in 2010. At the same time, the fraction of respondents with neutral attitude has increased by the same magnitude. From the ACNIS (2005) poll, we learn that around 52% of respondents are against Turkey's accession to the European Union. In the Caucasus Barometer (2010) survey, 46% and 17% of respondents' attitude towards Turkey's possible membership of the European Union were *absolutely negative* and *rather negative*, respectively. Though we lack in a common base for ACNIS (2005), Caucasus Barometer (2010) and the new dataset, the general pattern in the recent decade is that Armenians express more positive and neutral attitudes (57%, see

²² See Figure 4.1.

Annex 1, Figure 6) towards Turkey's possible membership of the European Union. They may see Turkey's accession to the EU beneficial for Armenia, as it would entail certain responsibilities on the part of Turkey to meet conditions to join the EU.

According to the survey results, the Armenian government, if adhering to the respondents' preferences, should claim restoration of territorial rights from Turkey as a consequence of the official recognition of the Armenian Genocide. As we see, despite the strong awareness of the importance of economic factors, respondents' claims on reparation are in high demand. Armenians are well aware that Turkey is very sensitive to the reparation claims and consider them, along with Nagorno-Karabakh, as one of the main preconditions for establishing economic ties.

Despite the very initiatives of Yerevan towards normalization and the recognition of the Armenian Genocide, respondents do not believe that official policies will make Turkey recognize the Armenian Genocide (results are summarized in Figure 5.2). Rather, they believe that the recognition can be achieved through pressures from a third party, such as Russia, EU and US. Current policies of Yerevan towards recognition should be more targeted and efficient, in order to convince Armenians about their relevance. A similar question had been asked in the ACNIS (2005) public poll: *In which way should Turkey recognize the Armenian Genocide?* The outcome is in line with the new finding: in 2005, only 8% of respondents believed that Armenia's state policy can make Turkey recognize Genocide, while around 50% hoped for international pressure and 27% thought that the recognition would be possible if it was made a prerequisite for entering the European Union.

The survey also shows that governmental policies by both Turkey and Armenia cannot ignore the impact of Azerbaijan on bilateral relations. More than 70% of the respondents indicated that Azerbaijan affect the Armenian-Turkish relations greatly. If Armenia takes a policy move, it is strongly predicted that the response by Ankara will incorporate Azerbaijan's view on the Armenian policy (this is the hypothesized channel of intervention). Armenia and Turkey should build their policies based not only on their opponents' policy responses, but also on a third party's (Azerbaijan) response. The bilateral game is turning into a multiple player game, in which sustaining long term agreements seems more difficult. On other hand, given that Azerbaijan's involvement in the Armenian-Turkish relationship is very high (according the poll results), the Armenian government may find out that there is little probability that constructive communication is feasible with Turkey in the absence of relationship with Azerbaijan. This may endanger the Armenian-Turkish normalization process to a large extent. A straightforward policy recommendation for the Turkish government will be that the expected relationship with Armenia should merely reflect Turkey's interest, which does not always need to be synchronized with the Azerbaijani policies. Otherwise, it creates disincentives for Armenia to invest in the normalization process.

Respondents give some value on the role of civil society initiatives targeting Armenia-Turkey reconciliation. There are several areas of initiatives suggested to respondents for indication, but neither of them has a support from the majority of respondents. We may hypothesize that responses reflect distrust towards the impact of civil initiatives on the reconciliation process. What is the "contribution" of the Armenian government in this outcome? The analysis suggests that the official policies are quite in line with the societal preferences, implying that the Armenian government has an incentive to support civil society initiatives, as long as they fairly represent the needs of society.

The alternative explanation for such a low relevance of the civil initiatives (according to respondents) is that the Armenian society does not value civil initiatives enough and therefore is reluctant to delegate civil organizations tasks connected with the normalization of the Armenian-Turkish relationship. If this is the case, long term efforts from the Armenian government and international organizations are needed to increase the importance of civil organizations and their initiatives generally, and in the normalization process particularly. Finally, when analyzing the summary statistics from the public poll conducted among Turkish citizens by EDAM (2014), given that Turkish government is consistently pursuing the rejection of Genocide, it is worth mentioning that 25% of respondents have no opinion about the issue. The very strong form of the resistance towards the recognition of the 1915 events is expressed by only one third of respondents, suggesting that one cannot exclude the possibility of Genocide recognition by Turkey which may lead to the full reconciliation of two nations.

Annex 1: Additional Figures and Tables

Figure 7. Respondents' interest in normalization of the official Armenian-Turkish relation for different age groups

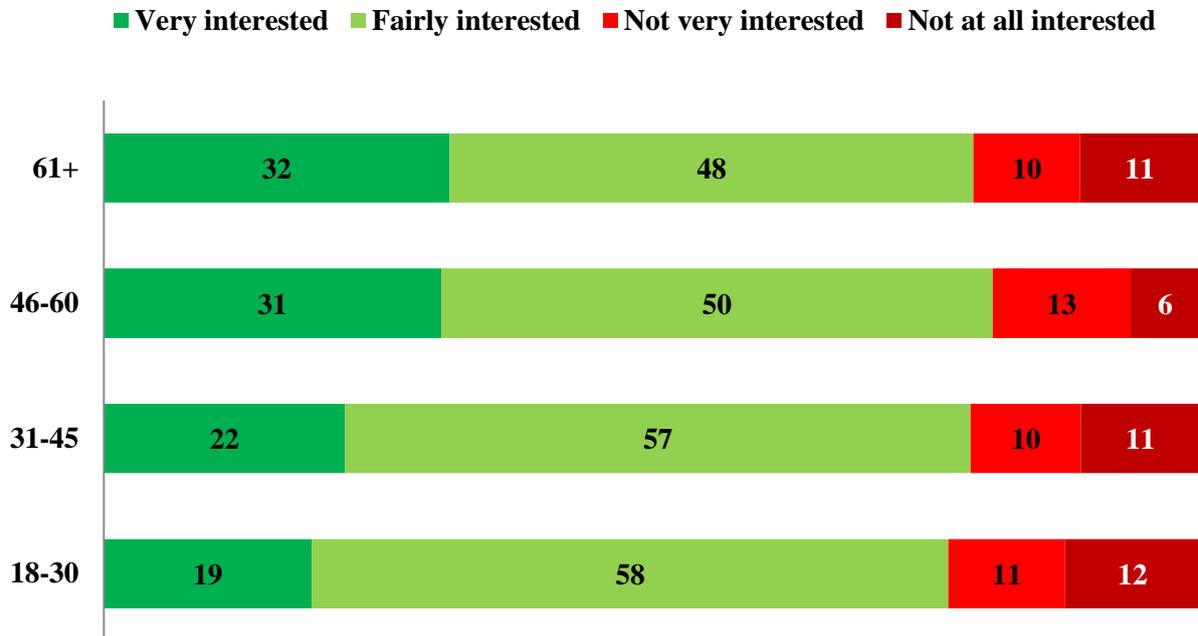


Figure 8. Interest in normalization of the official Armenia-Turkey relation by educational level of respondents

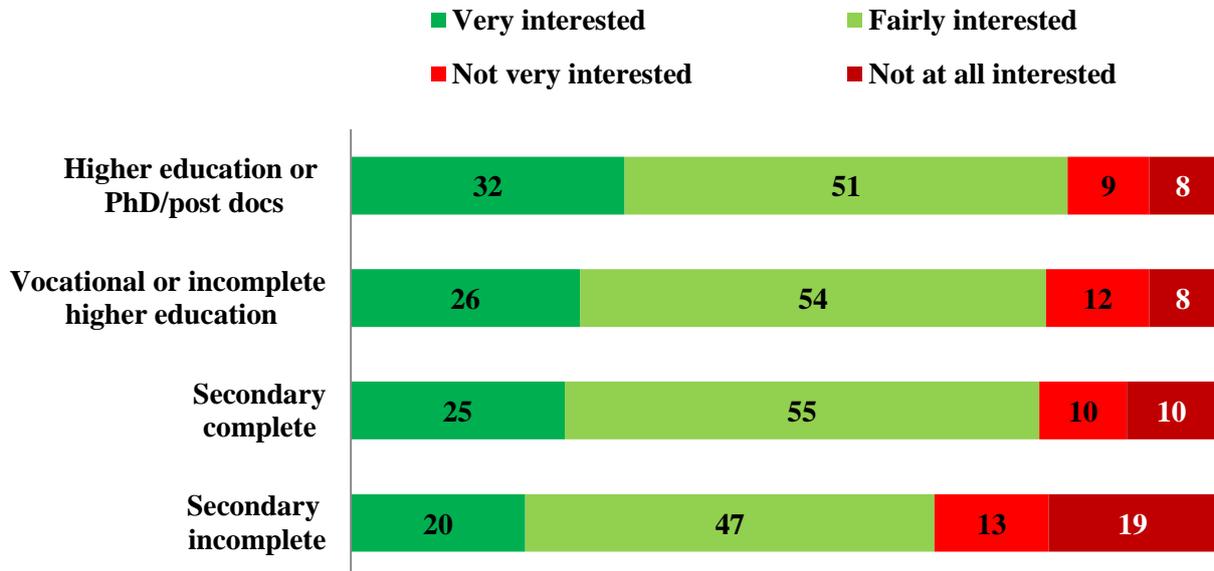


Figure 9. Respondents' interest in normalization of the official Armenian-Turkish relation regions bordered and not bordered with Turkey

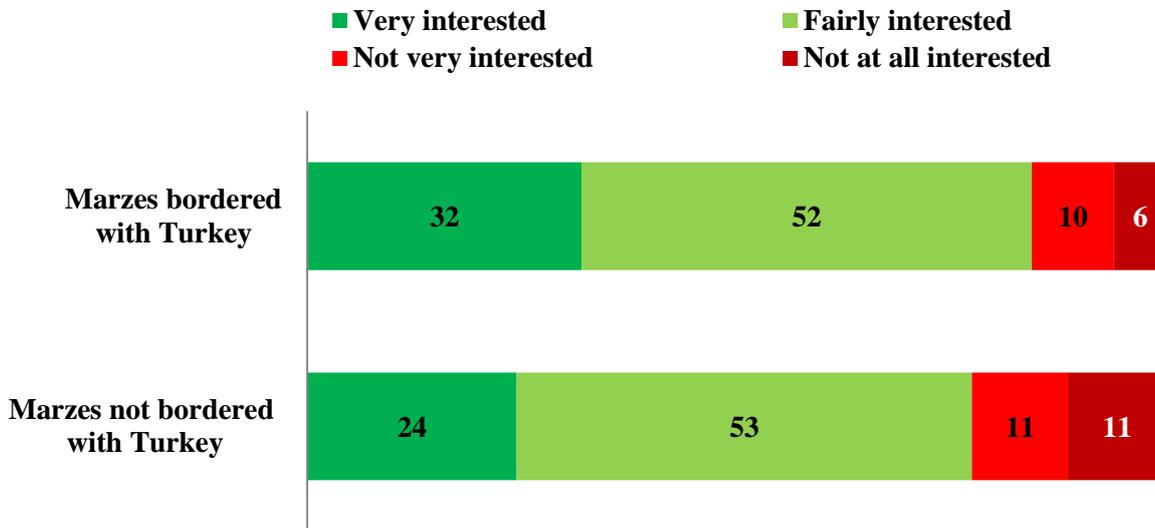


Figure 10. Whose opinions on Armenian-Turkish relations do you trust the most in Armenia?

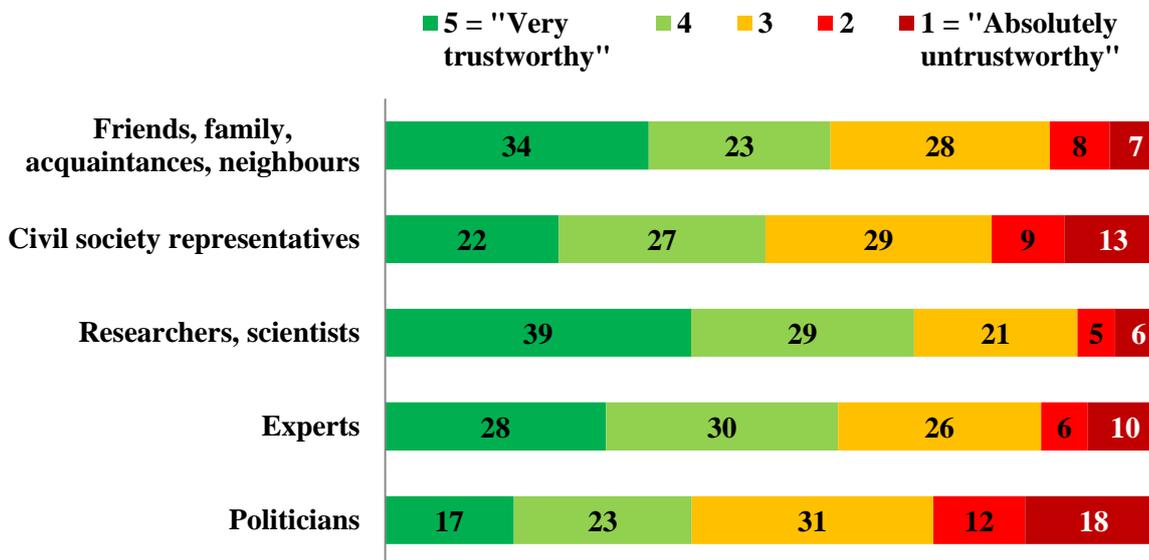


Figure 11. To what extent do you approve opening of the Armenia-Turkey border?

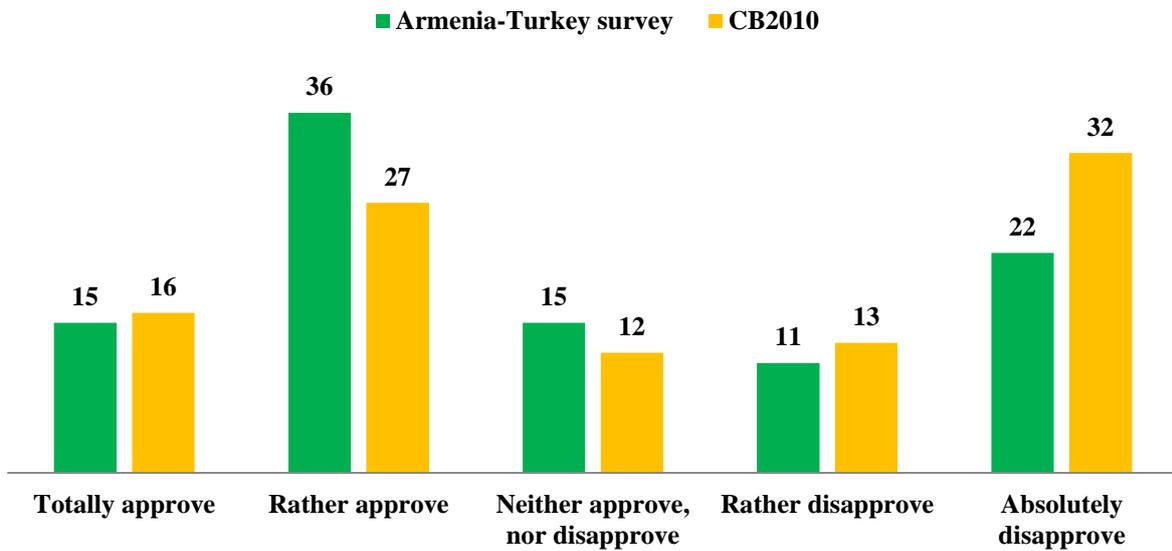


Figure 12. The fraction of respondents approving Armenians' ...

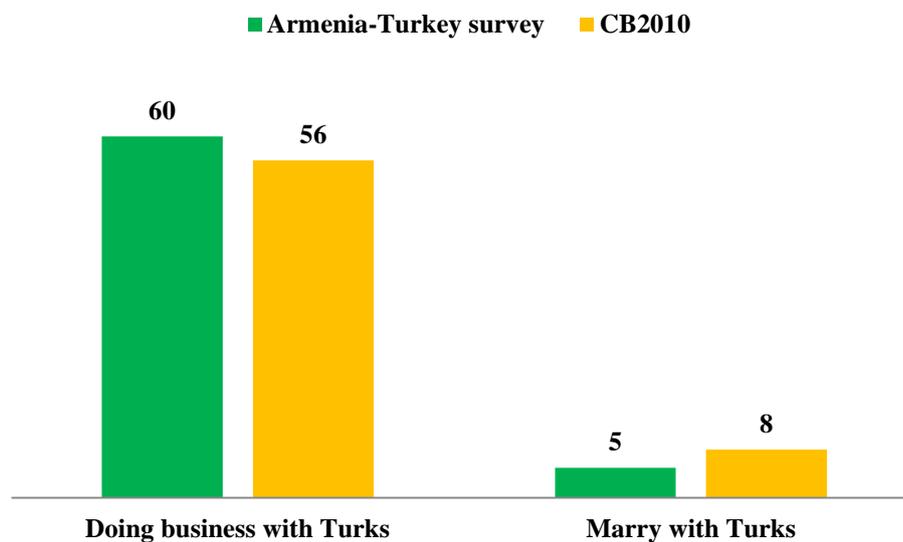


Figure 13. To what extent do you approve opening of the Armenia-Turkey border with preconditions? (among those who are neutral and/or positive regarding the idea of opening, N=562, %)

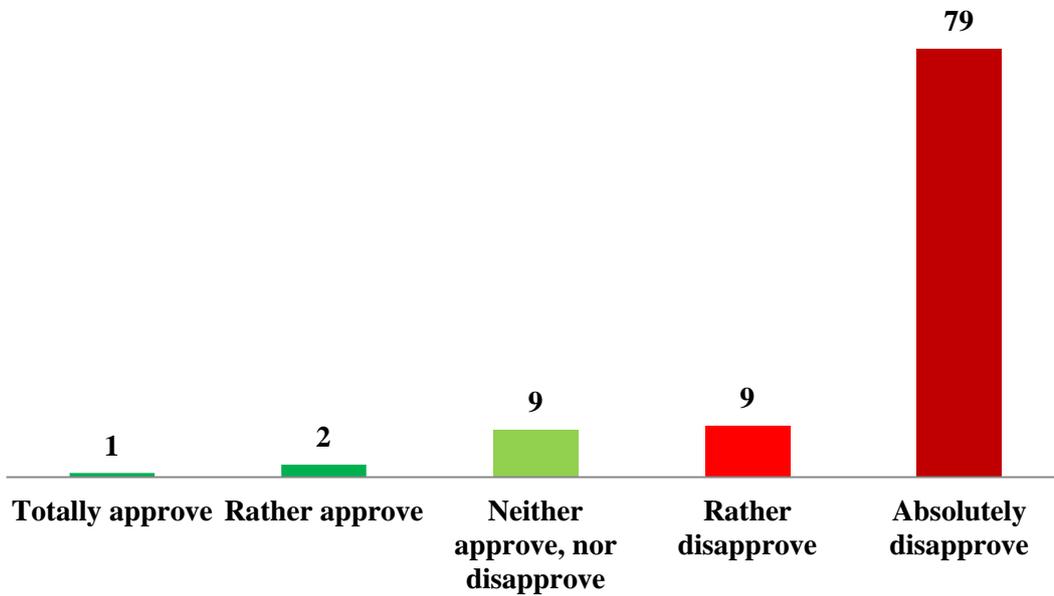


Figure 14. How can you describe your attitude towards Turkey's possible membership of the EU?

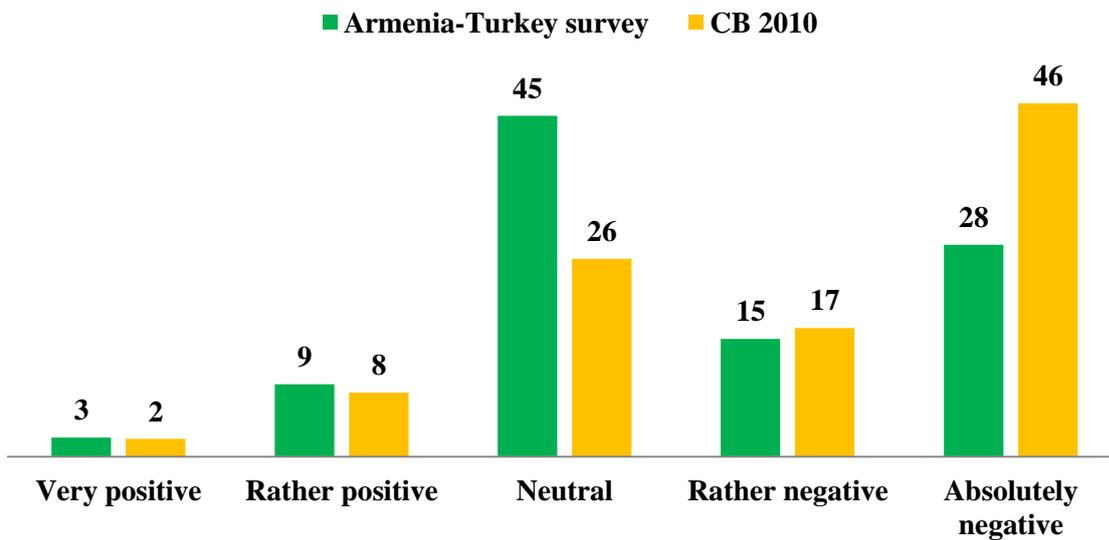


Figure 15. Conditions that Turkey should meet in order to join the EU (multiple answers)

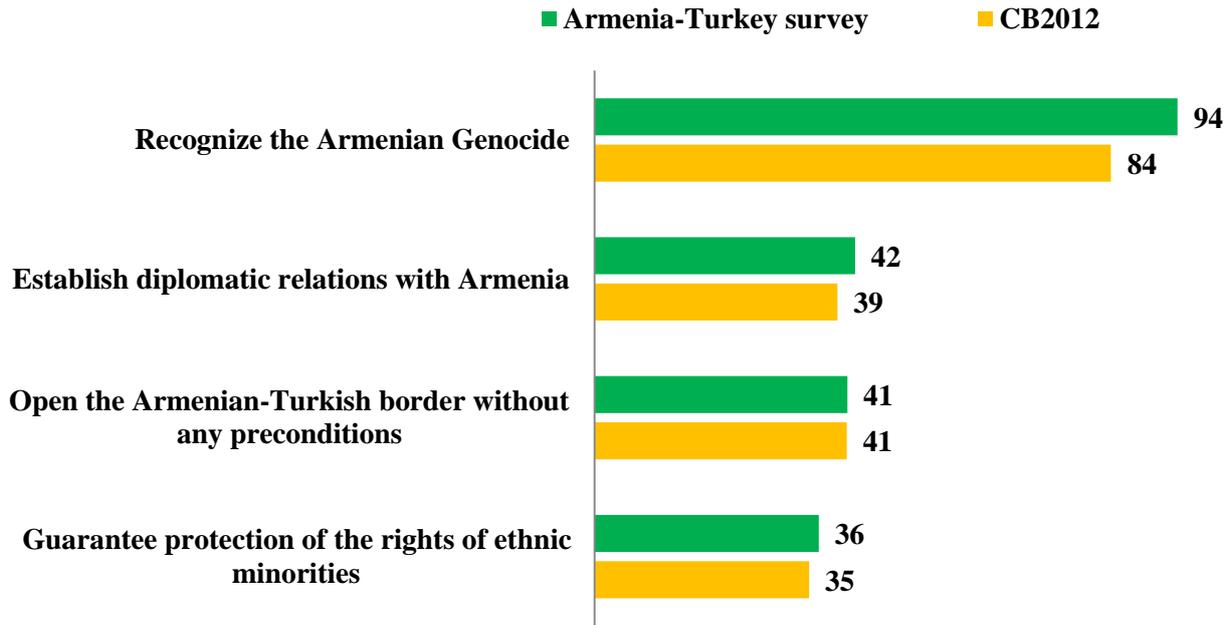


Figure 16. Has any of your ancestors suffered from the Armenian Genocide (has been displaced from their residence in Turkey, or died)?

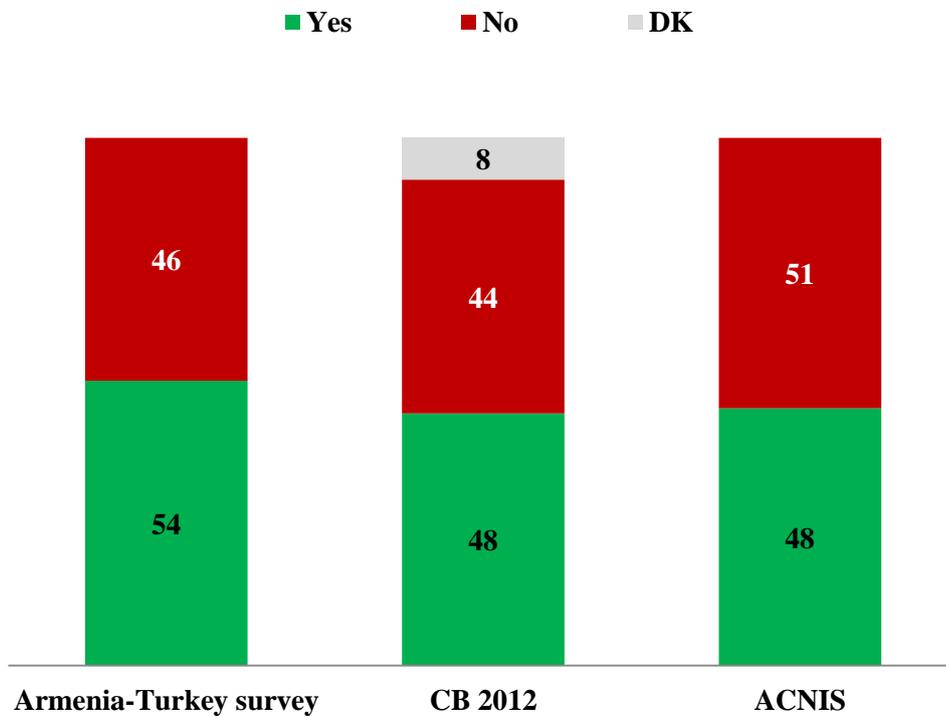


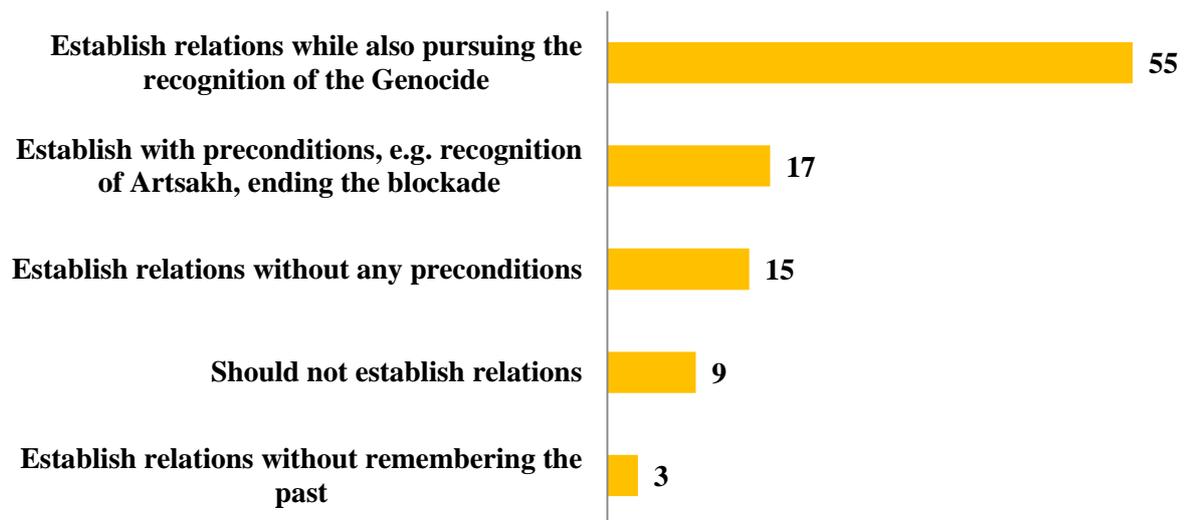
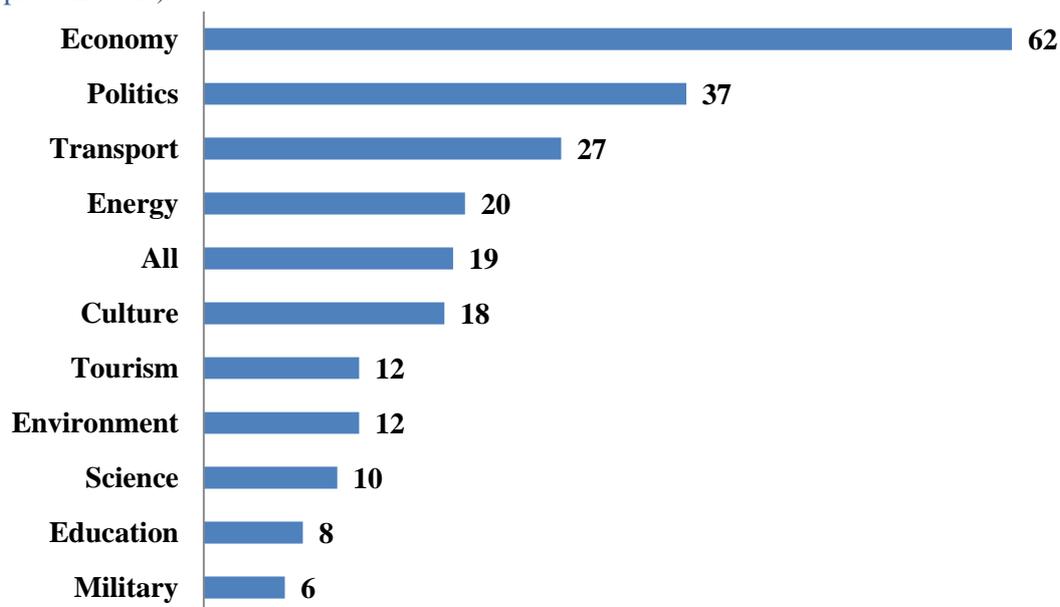
Figure 17. What should be Armenia's position regarding its relations with Turkey?**Figure 18. In which sectors should Armenia establish relations with Turkey?**
(multiple answers)

Figure 19. In your opinion, to what extent does Azerbaijan affect the Armenian-Turkish relations?

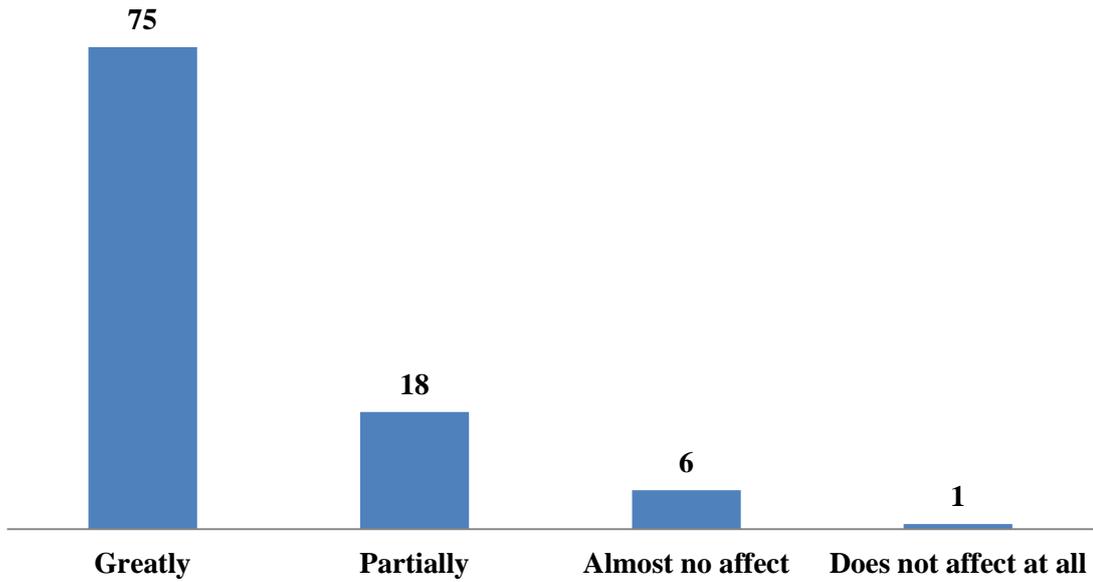


Table 3. A glance from Turkey:

“Which of the following policies should Turkey do regarding the Armenian issue” (among 1508 respondents interviewed in Turkey in November-December 2014, %)

Turkey should:							
	apologize for the Armenians that lost their lives in 1915 and admit that what had happened was a genocide	apologize for the Armenians that lost their lives in 1915 but take no another steps	express its regret over the Armenians that lost their lives in lives in 1915 but not apologize	express that not everyone that lost their lives in 1915 were Armenians and express its regret for all the Ottoman citizens that perished	take no steps	No idea/No response	Number of respondents, person
General	9.1	9.1	12	23.5	21.3	25	1508
Female	8.1	9.3	9.8	22.1	20.2	30.5	750
Male	10.1	8.9	14.2	24.9	22.4	19.5	758
18-24	12.8	8.4	8.9	22.2	29.2	18.5	250
25-34	14.3	4.9	12.3	26.2	20.7	21.6	365
35-44	5.2	9.7	15.1	19	19.8	31.2	307
45-54	9.3	7.3	10.6	22	20.8	29.9	249
55 +	4.1	14.8	12.2	26.7	18	24.1	337
Urban	6.1	8.4	11.4	26	22.3	25.8	1173
Rural	19.5	11.5	14.3	14.8	17.9	22.1	335

Source: Public opinion surveys of Turkish foreign policy 2015/1, EDAM

Annex 2: Sampling Methodology and Demographic Profile of Respondents

Sample size: 1,164 respondents representing the adult population of Armenia (18 and above)

Margin of error: $\pm 2.87\%$, at a 95% confidence level.

Sampling method:

Multistage cluster sampling with preliminary stratification by urban/rural areas and by administrative regions (marz).

Sampling frame:

Household address list of electricity users was provided by the Armenian Electricity Networks (CJSC). The following steps were implemented within a four-stage sampling approach:

- Grouping of electricity network branches into marzes; stratifying the sample proportionately by marz and by urban and rural areas.
- Random selection of Primary Sampling Units (PSUs), or clusters, within the marzes; each cluster comprised an average of 200 households
- Selection of households (final sampling units) within PSUs was performed by a random selection method.
- Selection of respondents within households was performed by the last-birthday method.
-

Table 4. Sample area by settlement types and Marzes

Settlement type	N
Yerevan	421
Other urban areas	335
Rural areas	408
Marz	
Aragatsotn	48
Ararat	96
Armavir	96
Gegharkunik	72
Kotayk	108
Lori	108
Shirak	73
Syunik	58
Vayots Dzor	24
Tavush	60
Yerevan	421

The main fieldwork period: December 13-22, 2014.

Method of empirical data collection:

Face-to-face interview in a household dwelling, with the help of pen and paper.

Weights:

Following data collection, the data was weighted by marz, age and gender to bring the realized sample in line with target population parameters. The initial weights derived from the sample were adjusted, taking into account the official data of the National Statistical Service (NSS) Armenia on the composition of adult population by marz, age and gender; non-response rates for each cluster are reflected in the weight calculation.

Table 5. Respondents' demographic profile

Sex	%
Male	34
Female	66
Age	%
18-30	22
31-45	23
46-60	26
61+	29
Education	%
No primary education	0.4
Primary (complete or incomplete)	2.0
Secondary (incomplete)	8.8
Secondary (complete)	36.6
Vocational	22.8
Higher education (incomplete)	3.9
Higher education (complete)	25.0
PhD and post-doc	0.5