

# **L'opinion américaine est-elle devenue protectionniste?**

**IFRI, 1er décembre 2016**

# Les DISCOURS des candidats

## Donald Trump



- Anti-TPP
- Renégociation du NAFTA
- Renforcement musclé des règles commerciales
- Augmentation des taxes sur les importations (45% sur les chinoises)
- Incitations au retour des industries sur le sol national
- Investissement dans les infrastructures nationales

## Hillary Clinton



- Rejet du TPP
- soutien aux politiques commerciales qui aident l'emploi US
- Aide à l'investissement dans l'industrie US
- Pressions contre les manipulations monétaires chinoises

# Les premières mesures de trump (9 novembre)

“On the same day, I will begin taking the following 7 actions to protect American workers:

\* FIRST, I will announce my intention to **renegotiate NAFTA or withdraw from the deal** under Article 2205

\* SECOND, I will announce our **withdrawal from the Trans-Pacific Partnership**

\* THIRD, I will direct my Secretary of the Treasury to **label China a currency manipulator**

\* FOURTH, I will direct the Secretary of Commerce and U.S. Trade Representative to identify all foreign trading **abuses that unfairly impact American workers** and direct them to use every tool under American and international law to end those abuses immediately

\* FIFTH, I will lift the restrictions on the production of \$50 trillion dollars' worth of job-producing American energy reserves, including shale, oil, natural gas and clean coal.

\* SIXTH, lift the Obama-Clinton roadblocks and allow vital energy infrastructure projects, like the Keystone Pipeline, to move forward

\* SEVENTH, cancel billions in payments to U.N. climate change programs and use the money to fix America's water and environmental infrastructure”

## Le DISCOURS OFFICIEL (USTR)

Selon le Peterson Institute for International Economics, les revenus sont 9% plus élevés qu'ils ne le seraient sans la libéralisation du commerce depuis la 2e GM. Ce surcroît pourrait augmenter de moitié.

Les exportations représentent 13,45% du PIB et font vivre 11,3 millions d'emplois.

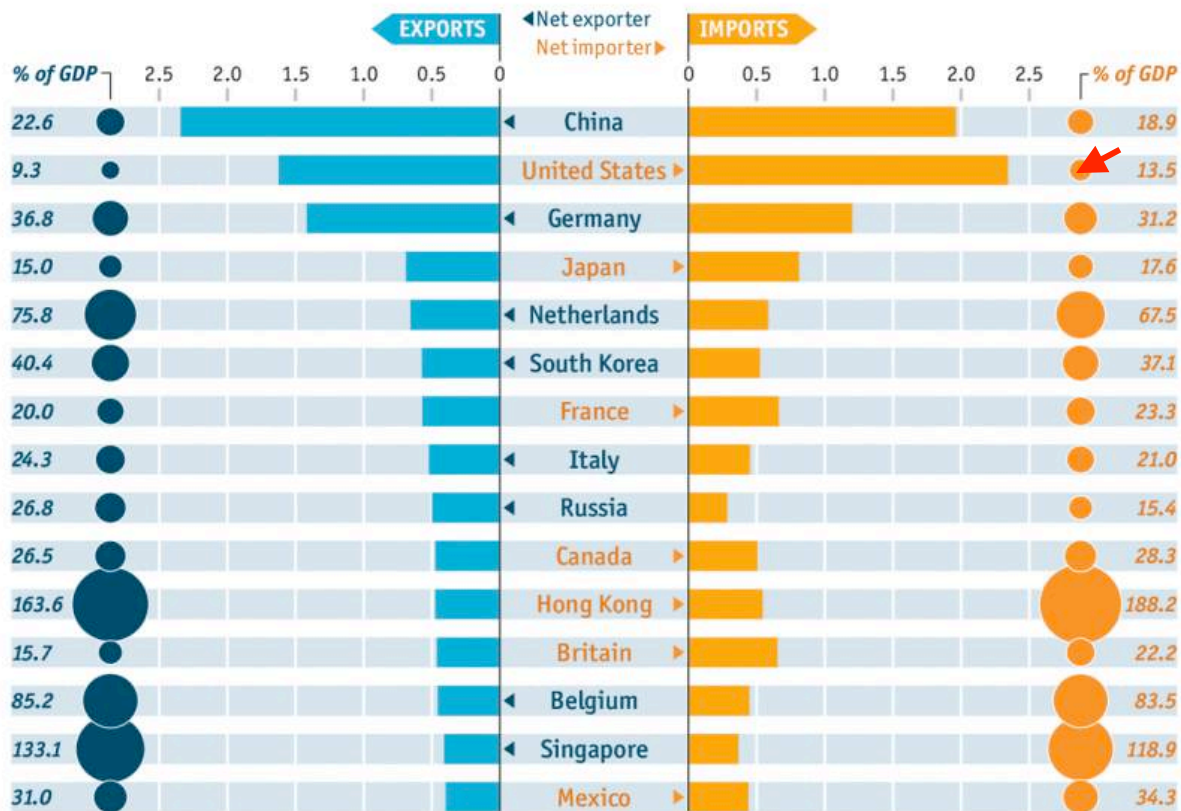
25% des emplois manufacturiers sont soutenus par les exportations.

Les emplois américains soutenus par les exportations de biens sont rémunérés entre 13 à 18% de plus que la moyenne.



## Trade flows

Largest global exporters, 2014, \$trn



Source: IMF

Economist.com

# UnE OPINION CONTRASTEE

1) Quand la question est posée de façon abstraite, les Américains sont favorables aux accords commerciaux

2) Quand elle est posée de façon concrète, ils jugent qu'elle a eu un coût en terme d'emploi et de salaires

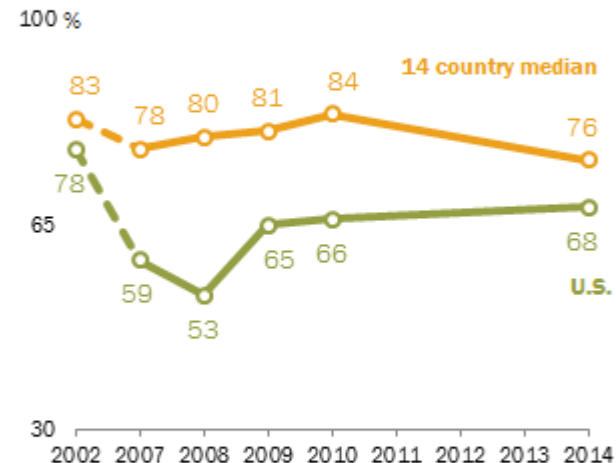
# Un scepticisme en hausse dans les années 2000 : -25 points

“La hausse du commerce et des liens d'affaires avec d'autres pays est une bonne chose”

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## Americans Less Convinced Trade Is Good

*Growing trade and business ties with other countries are a good thing*



Note: 14 country median based on countries surveyed in 2002, 2007-10 and 2014. U.S. not included in 14 country median.

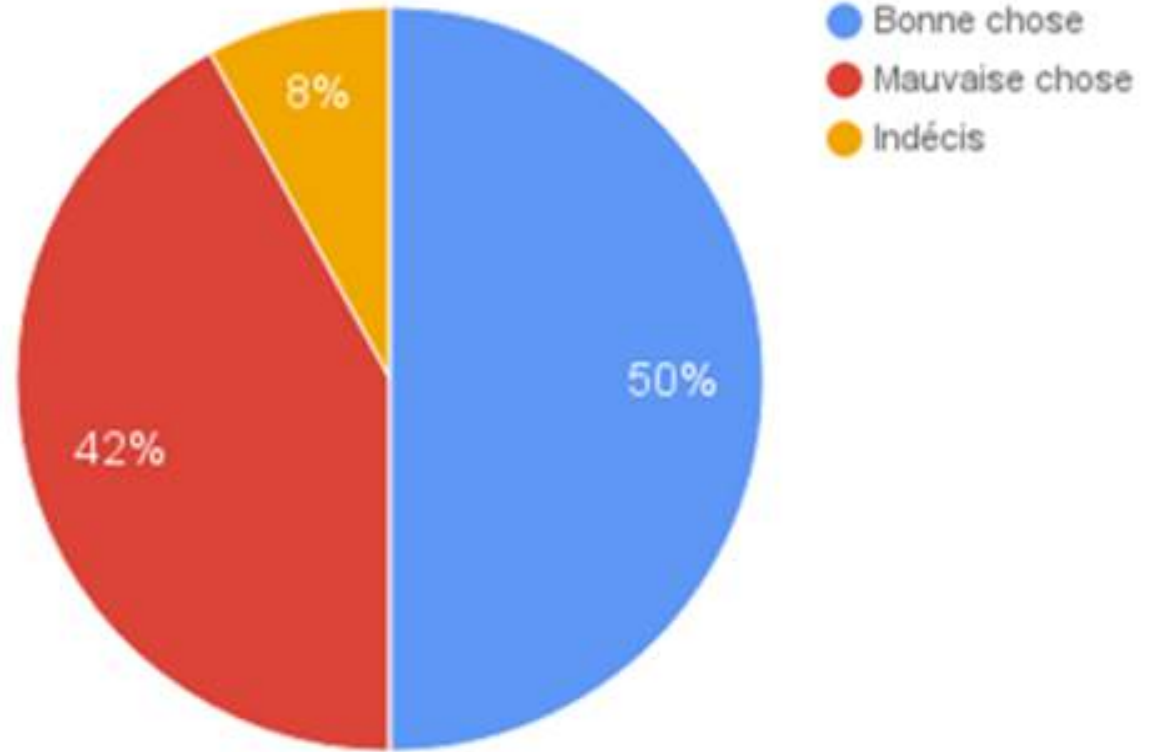
Source: Spring 2014 Global Attitudes survey. Q27.

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# Le commerce international : une bonne chose ?

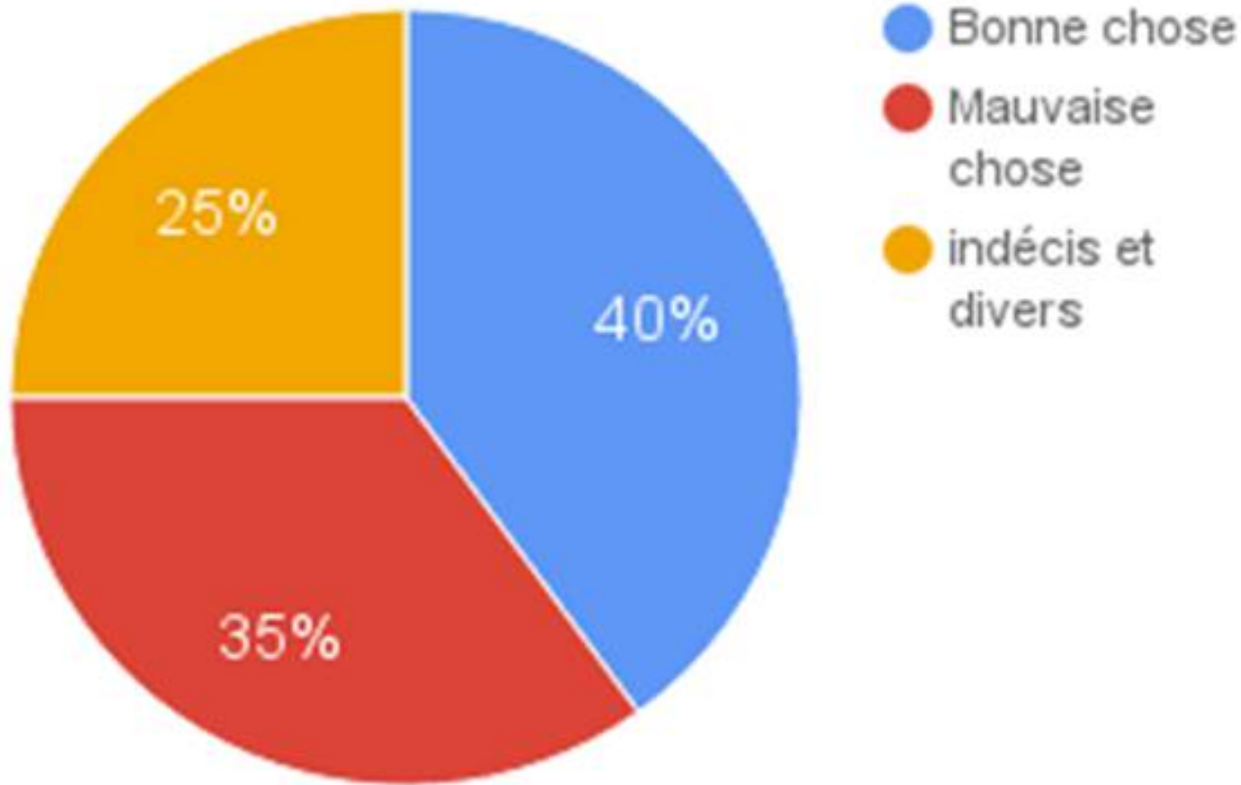
Oui : **50%**



"In general, do you think that free trade agreements between the U.S. and other countries have been a good thing or a bad thing for the United States?"

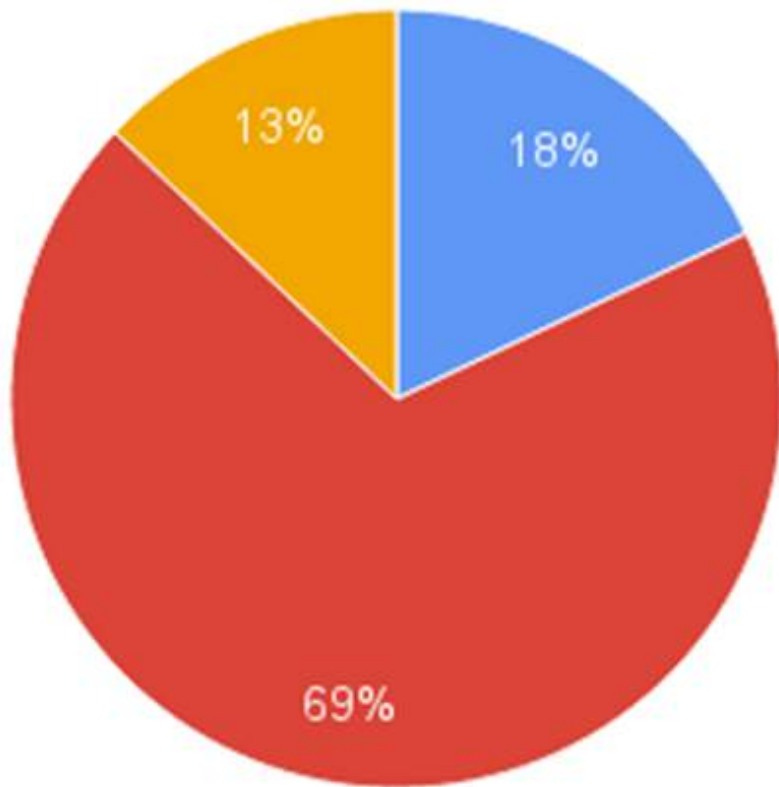


**TPP  
40%  
pour  
35%  
contre**



"As you may know, the United States has negotiated a free trade agreement with eleven countries in Asia and Latin America called the Trans-Pacific Partnership, or TPP. Do you think this trade agreement would be a good thing for our country or a bad thing?" [Pew Research Center](#). Aug. 9-16, 2016. Adults nationwide.

# LES ACCORDS ONT coûté des emplois : **69%**



- A créé + de jobs
- A coûté des jobs
- Indécis

"From what you know, do you think that free trade agreements between the United States and other countries help to create more jobs in the U.S., or do you think they cost the U.S. jobs?" **NBC News/Wall Street Journal Poll** conducted by the polling organizations of Peter Hart (D) and Bill McInturff (R). Sept. 22-26, 2010. N=1,000 adults nationwide.

# Le divorce peuple-elites

L'implication dans  
l'économie globale :  
bonne ou mauvaise  
chose ?

## Foreign policy scholars sharply more positive on U.S. involvement in global economy than general public

*Which statement comes closer to your view about U.S. involvement in the global economy, even if neither is exactly right?*



Source: U.S. general public survey conducted April 12-19, 2016 by Pew Research Center (n=2,008). IR scholars' snap poll produced by the Teaching, Research, and International Policy (TRIP) Project based at the College of William & Mary, fielded on Oct. 5, 2016 (n=747). See <https://trip.wm.edu/charts> for more details.

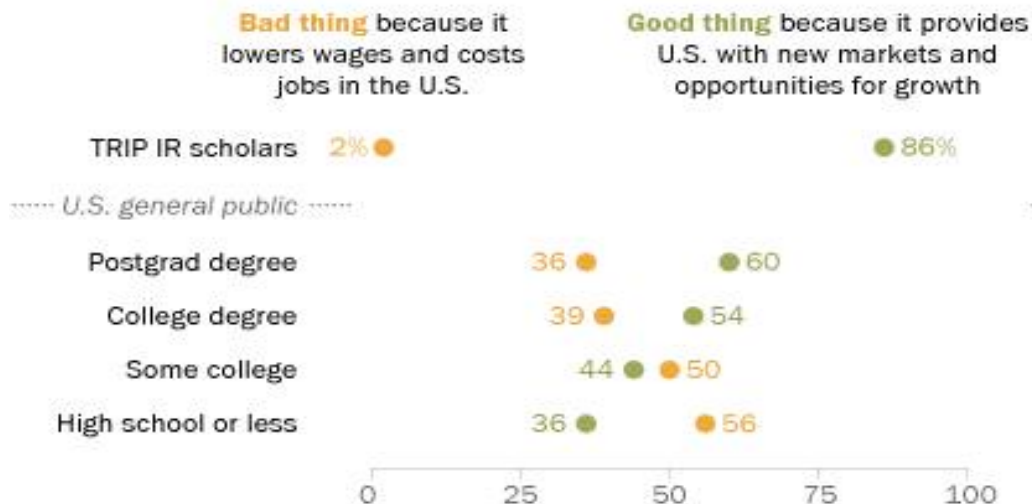
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# Le divorce peuple-eLITE (2)

Plus on est éduqué,  
plus on apprécie la  
globalisation

## Highly educated Americans closer to IR scholars on U.S. involvement in the global economy

Which statement comes closer to your view about U.S. involvement in the global economy, even if neither is exactly right?



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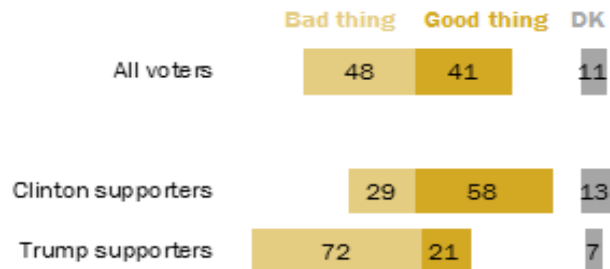
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# Les Pro-TRUMP hostiles au libre échange

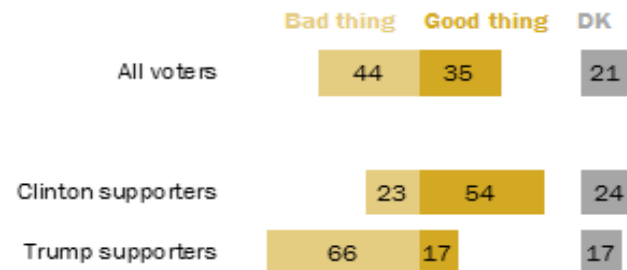
7 “trumpistes” sur 10 pensent que le libre-échange et le TPP sont mauvais pour les US

## Clinton, Trump backers differ on impact of free trade agreements and the TPP

*% of registered voters who say free trade agreements have been a \_\_\_ for the U.S.*



*% of registered voters who say the Trans-Pacific Partnership would be a \_\_\_ for the U.S.*



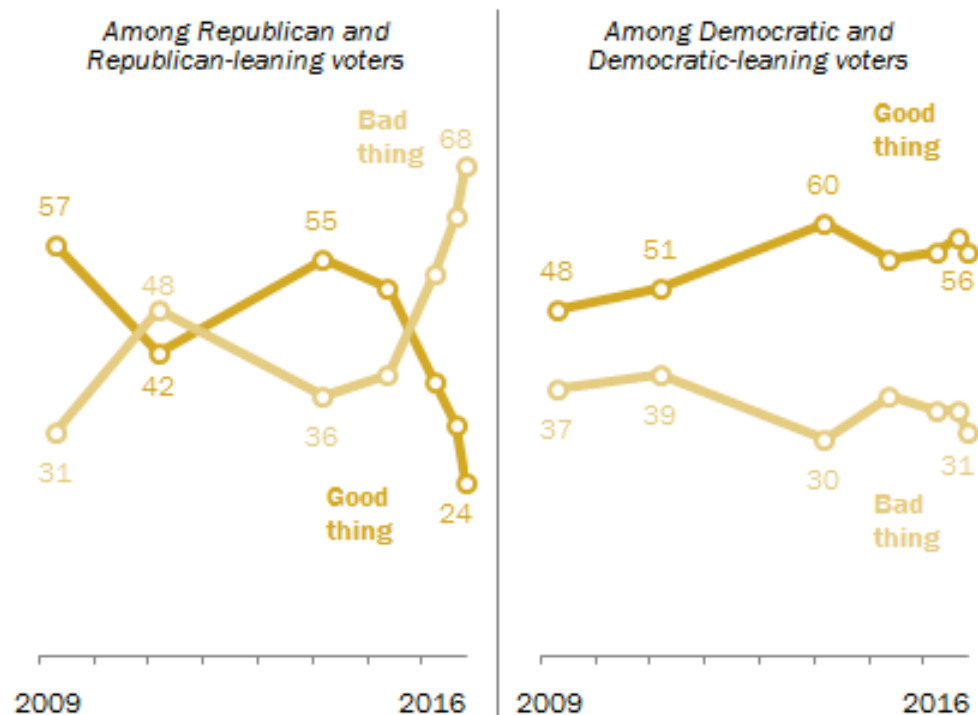
Notes: Based on registered voters. Don't know responses for TPP include those who have not heard of the agreement. Figures may not add to 100% because of rounding. Q95F1 & Q96F2.

Source: Survey conducted Oct. 20-25, 2016.

# Les REPUBLICAINS ont basculé en 2014

## Share of GOP voters saying free trade agreements are good for the U.S. continues to fall

% of voters saying free trade agreements have been a \_\_\_ for the U.S.



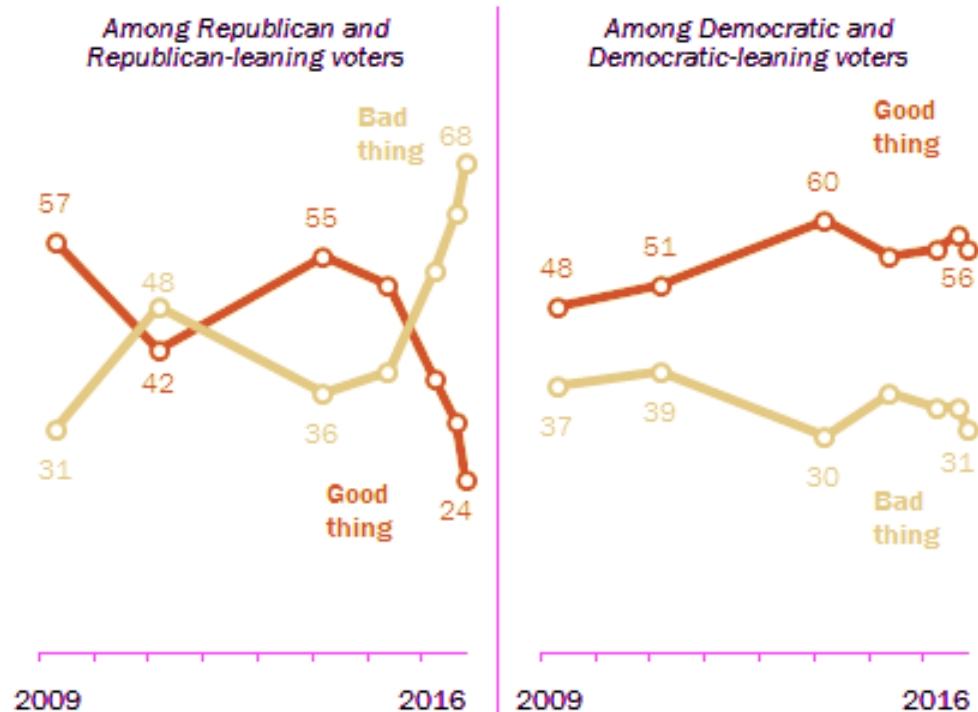
Notes: Based on registered voters. Don't know responses not shown. Q95F1.  
Source: Survey conducted Oct. 20-25, 2016.

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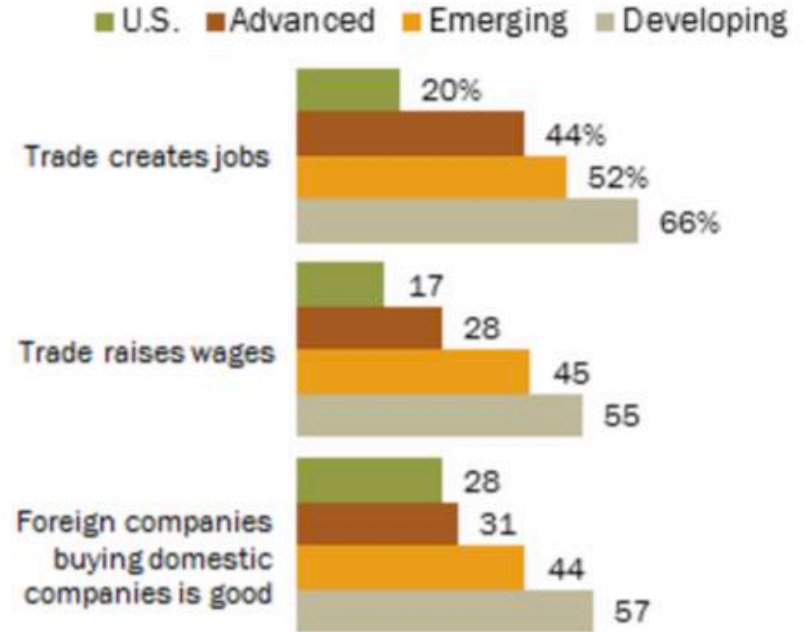
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Les  
Américains  
Moins  
optimistes  
que les  
autres pays  
avancés

## Americans Unsure of Trade Benefits



Note: Medians by country economic categorization. Advanced median excludes U.S.

Source: Spring 2014 Global Attitudes survey. Q28, Q29 & Q31.

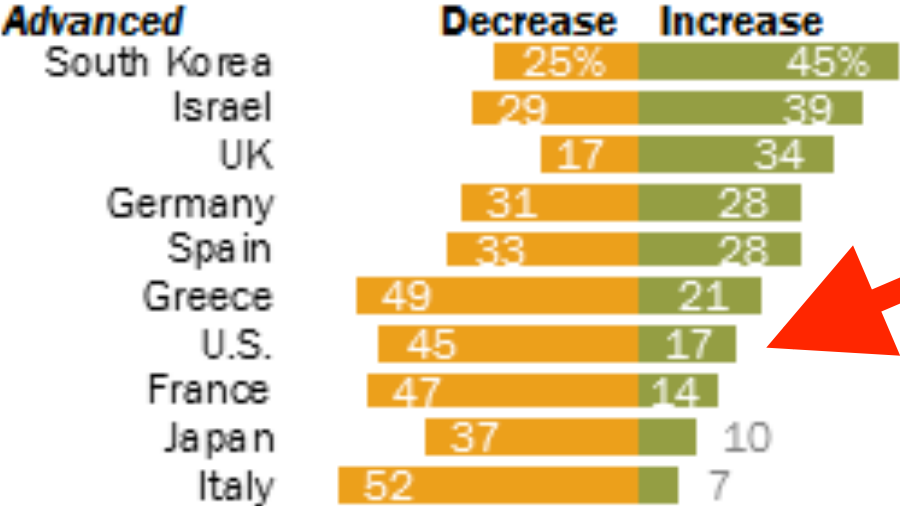
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# Les Américains Moins optimistes que les autres

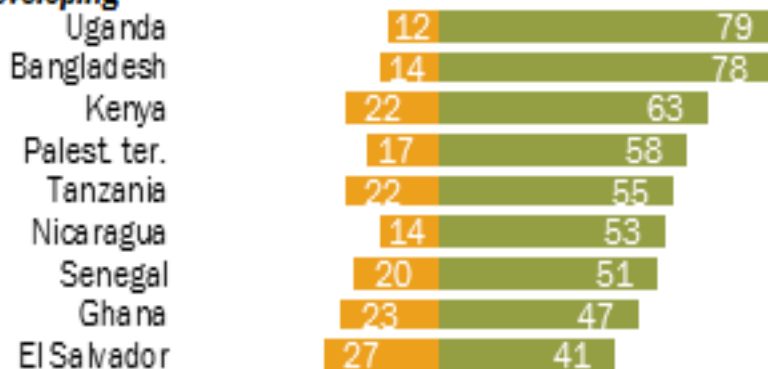
## National Views of Trade & Wages

*Does trade with other countries lead to an increase in wages of workers, a decrease in wages or does it not make a difference?*

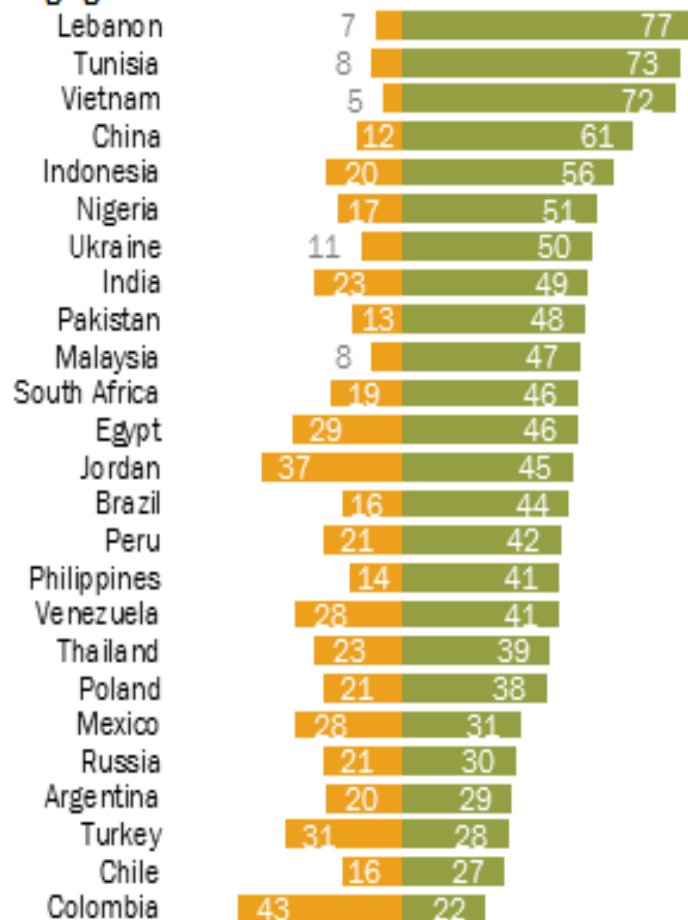


# SUITE: Dans Les PAYS EMERGENTS ET EN DEVELOPPEMENT

## Developing

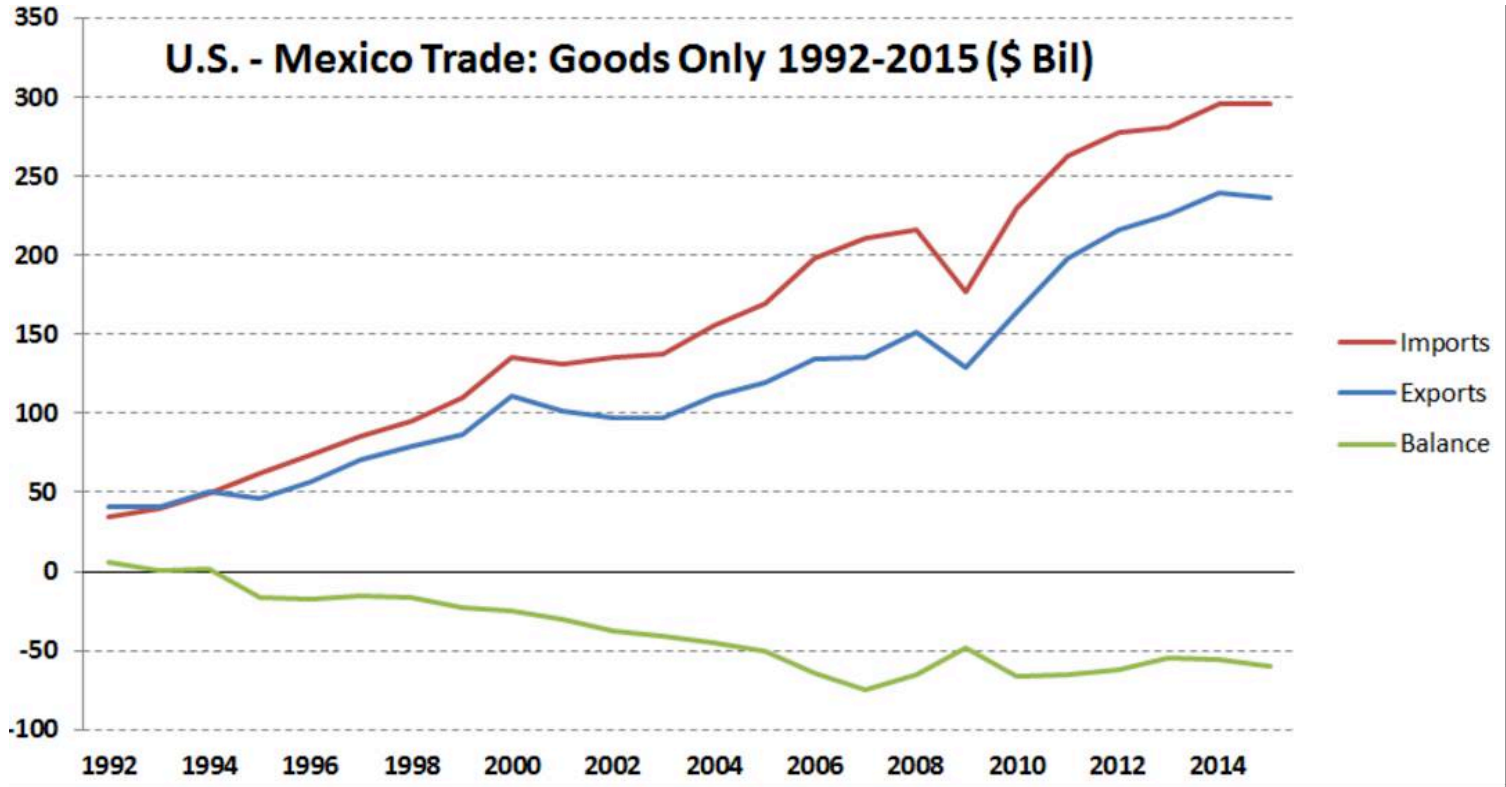


## Emerging



## Developing

# Le Choc du Nafta ?



# Le Choc du Nafta

Un effet positif sur les travailleurs mais...

Shushanik Hakobyan (Fordham University)  
John McLaren (University of Virginia)

*The Review of Economics and Statistics, 2016*

...dans les régions où le NAFTA a eu des conséquences directes, un travailleur non qualifié a vu son salaire **augmenter 17% moins vite** entre 1990 et 2000.

Y compris les serveurs des bars.

# La Chine : un choc bien plus brutal

**David Autor**

**David Dorn**

**Gordon Hanson**

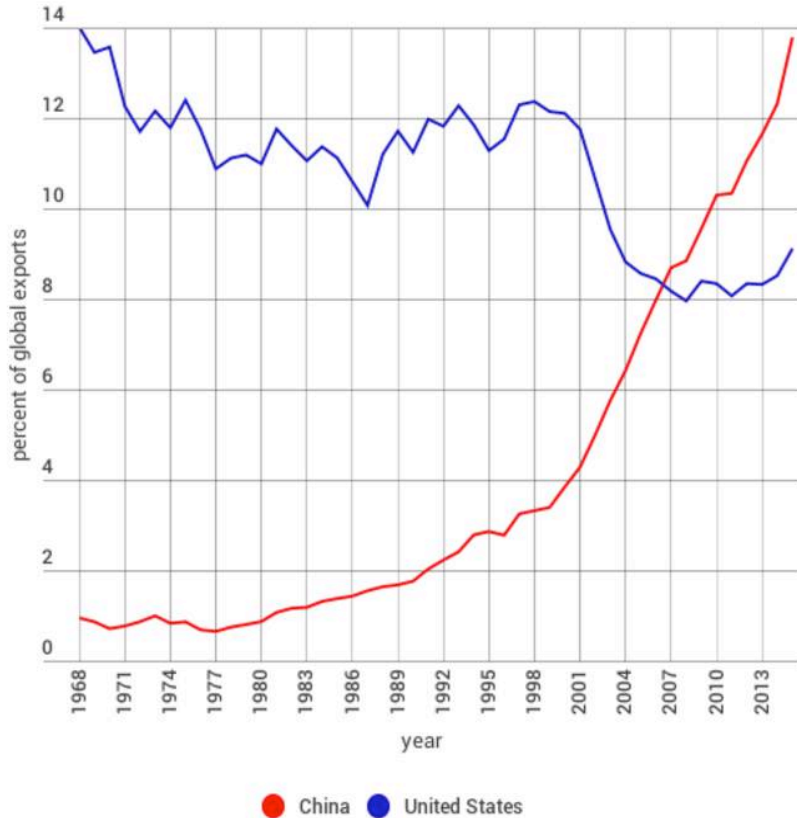
“The China Syndrome:  
Local Labor Market  
Effects of Import  
Competition in the United  
States”

*American Economic  
Review, 2013*

La concurrence des importations en provenance de Chine explique 44% du déclin des emplois industriels entre 1990 et 2007.

**-> 2.4 millions  
d'emplois perdus**

# L'IMPACT

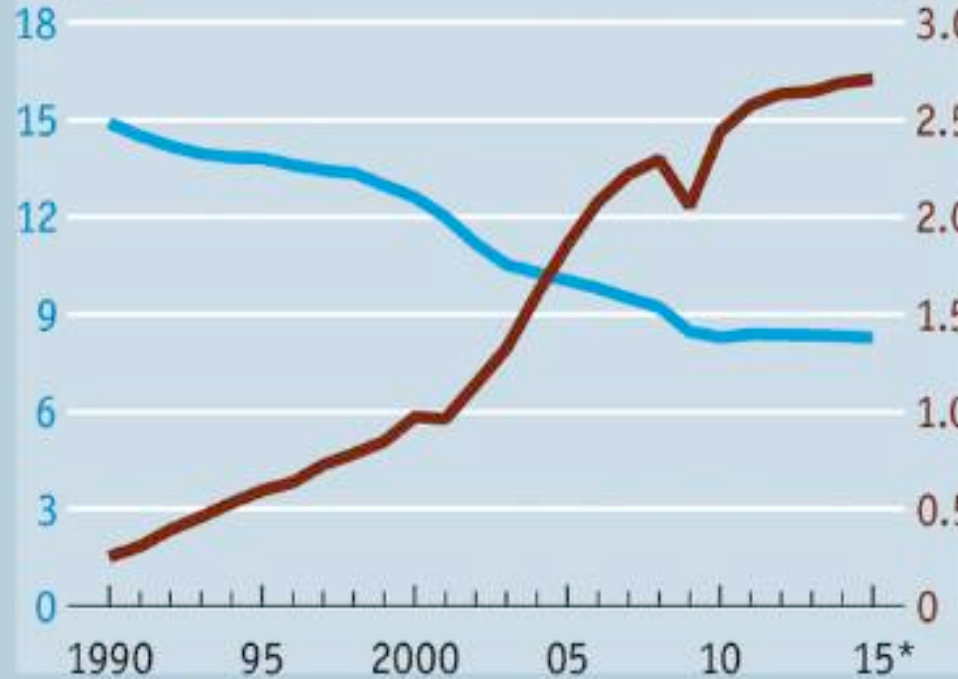


## Trader woes

United States

*Manufacturing  
As % of total  
employment*

*Imports  
from China  
As % of GDP*



Sources: US Census Bureau; US Bureau of Labour Statistics; IMF

Les salaires REELS stagnent depuis 40 ans

## Bigger Paychecks, But Little Change in Purchasing Power

*Average hourly wages, seasonally adjusted*



Note: Data for production and non-supervisory employees on private non-farm payrolls.

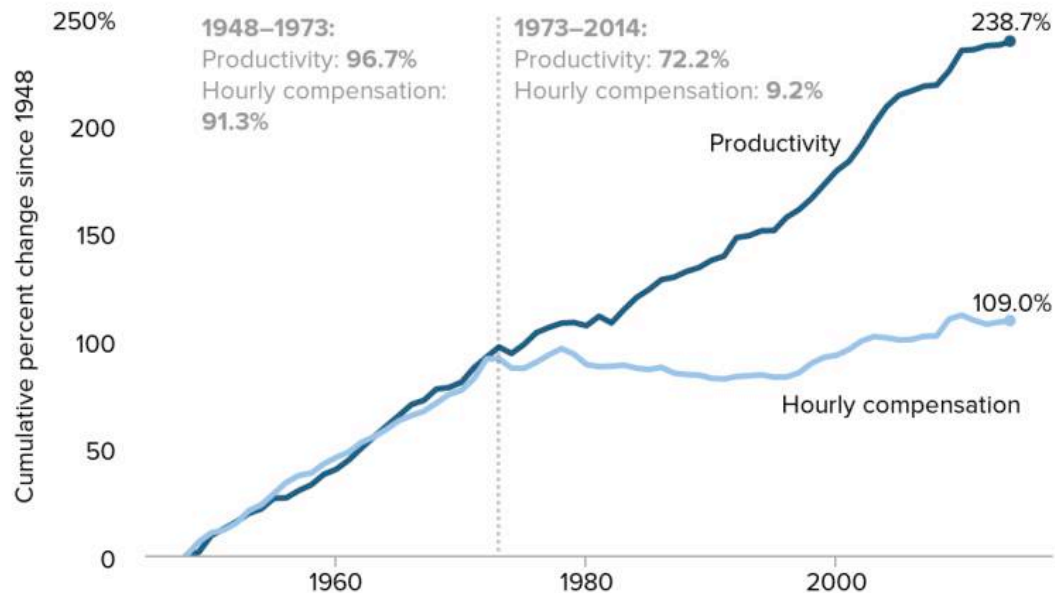
Source: Bureau of Labor Statistics

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# Le pouvoir d'achat ne suit pas les gains de productivité

La productivité a plus que doublé depuis 1970, alors que le salaire médian n'a augmenté que de 11%.

## Disconnect between productivity and a typical worker's compensation, 1948–2014



**Note:** Data are for average hourly compensation of production/nonsupervisory workers in the private sector and net productivity of the total economy. "Net productivity" is the growth of output of goods and services minus depreciation per hour worked.

**Source:** EPI analysis of data from the BEA and BLS (see technical appendix for more detailed information)

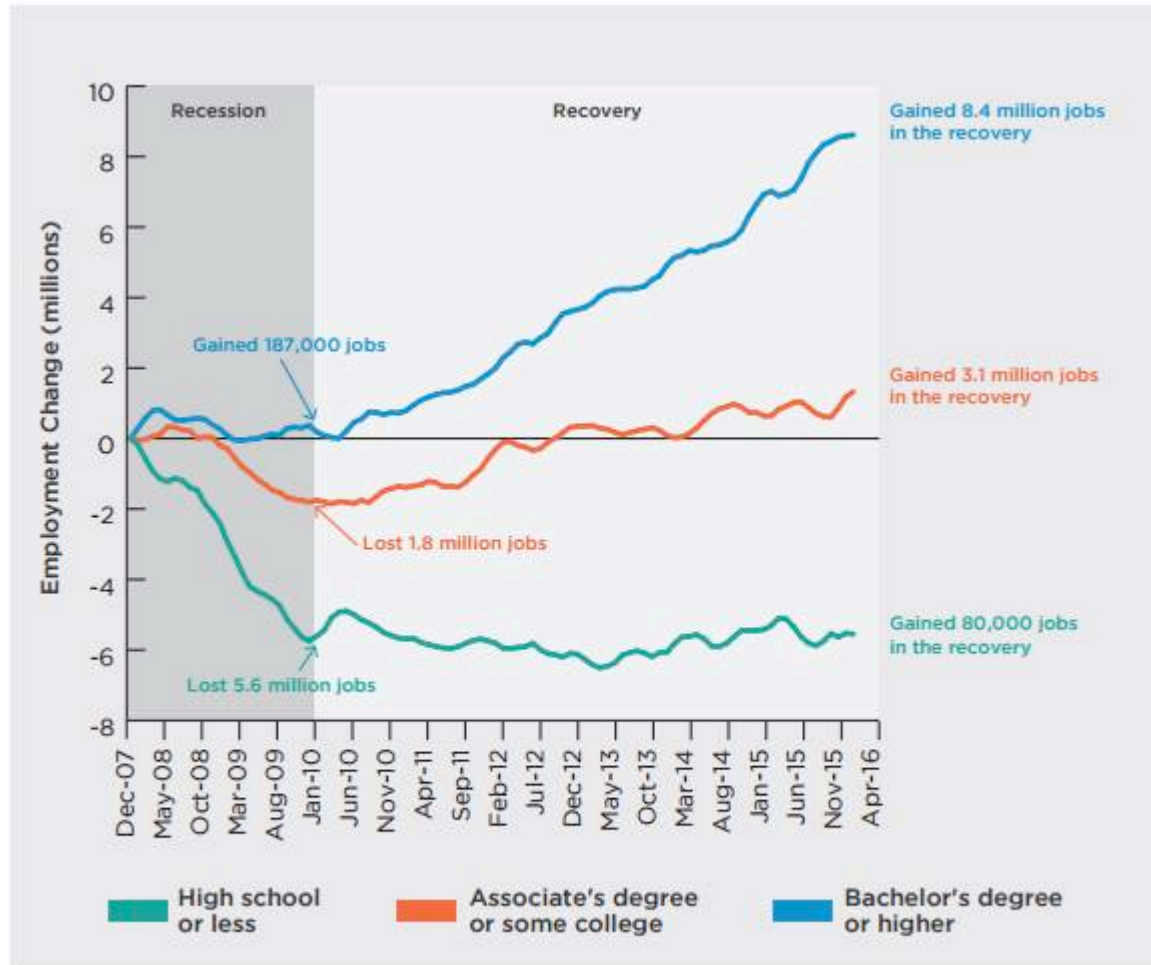


# Les pertes d'emploi de la Récession

**BTP : -13.7%**

**Industrie : -10%**

**Finance : -3,9%**



Source: Georgetown University Center on Education and the Workforce analysis of *Current Population Survey* (CPS) data, 2007-2016.

# L'Emploi industriel n'a pas autant profité de la reprise

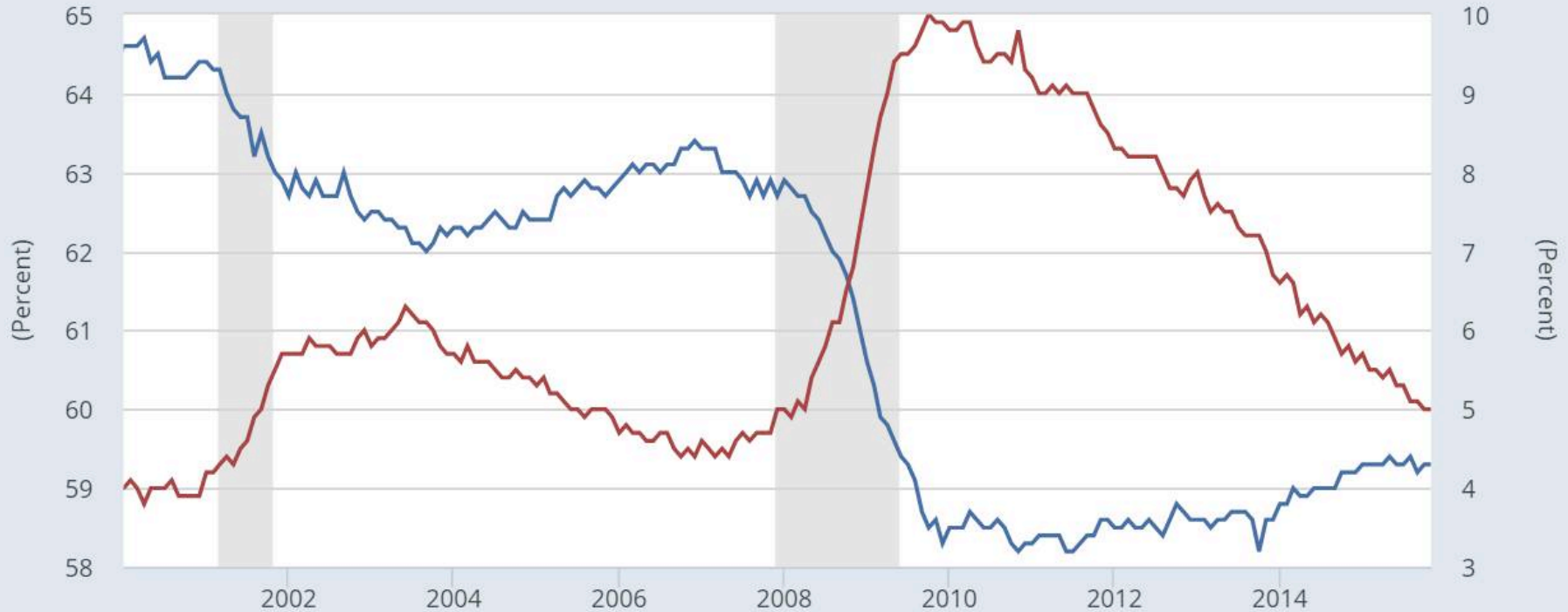


Source: Georgetown University Center on Education and the Workforce analysis of *Current Population Survey* (CPS) data, 2007-2016.

# Baisse du Chômage mais...

**FRED**

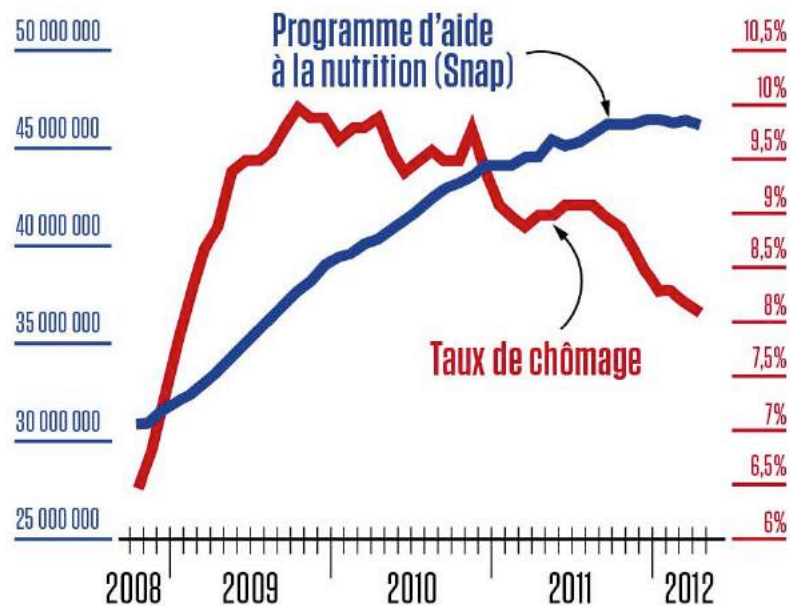
— Civilian Employment-Population Ratio (left)  
— Civilian Unemployment Rate (right)



# Baisse du chômage mais...

## ÉTATS-UNIS : BAISSÉ DU CHÔMAGE, HAUSSE DE LA DEMANDE DE BONS ALIMENTAIRES

*Evolution du nombre de bénéficiaires du Snap et du taux de chômage*



SOURCE : USDA, BLS

# LE SYNDROME DE L' ELEPHANT

Progression du revenu entre 1988 et 2008, selon les centiles, dans le monde

