



ANALYSIS OF THE PERCEPTION OF THE EU AND EU'S POLICIES ABROAD

EXECUTIVE SUMMARY

December 7, 2015

The study was requested by the European Commission's Service for Foreign Policy Instruments (FPI) and was implemented in January – November 2015 by the following three partner organisations: the **Public Policy and Management Institute (PPMI)** (the lead partner) based in Vilnius, Lithuania; the **National Centre for Research on Europe (NCRE)**, located at the University of Canterbury in Christchurch, New Zealand; and the **NFG Research Group**, based at Freie Universität Berlin, Germany. The study also drew on the expertise of expert teams based in 10 Strategic Partner countries: Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, South Korea, and the US. The public opinion poll in the 10 countries was carried out by TNS Global. The social media analysis was carried out by the NCRE with substantive support of the Statistical Cybermetrics Research Group at the University of Wolverhampton, the UK.

The main contributors to this study are, in alphabetic order:

Egidijus Barcevičius (Public Policy and Management Institute, Vilnius)
Haroldas Brožaitis (Public Policy and Management Institute, Vilnius)
Elma Caicedo (Public Policy and Management Institute, Vilnius)
Natalia Chaban (NCRE, University of Canterbury)
Johanna C. Günther (NFG, Freie Universität Berlin)
Martin Holland (NCRE, University of Canterbury)
Anja Lutz (NFG, Freie Universität Berlin)
May-Britt U. Stumbaum (NFG, Freie Universität Berlin)

The country expert teams are presented in Annex I.

The study was presented to the Steering Committee on November 12, 2015. It has been revised to reflect ideas discussed during the meeting as well as follow-up suggestions received via email.

The study does not represent the official views of the European Commission.

Table of contents

1	PERCEPTION OF EU AND EU'S POLICES ABROAD: EXECUTIVE SUMMARY	4
1.1	SCOPE AND METHODOLOGY OF THE STUDY	4
1.2	SUMMARY FINDINGS.....	4
2	KEY FINDINGS: COMPARATIVE OVERVIEW	7
2.1	VISIBILITY	7
2.2	ACTORNESS.....	11
2.3	EFFECTIVENESS.....	15
2.4	EU AS A NORMATIVE POWER	19
2.5	EXPLAINING PERCEPTIONS.....	19
2.6	REGIONAL FINDINGS.....	22
3	POLICY RECOMMENDATIONS.....	22
3.1	OVERALL PUBLIC DIPLOMACY STRATEGY AND ITS IMPLEMENTATION	22
3.2	MEDIA AND SOCIAL MEDIA RECOMMENDATIONS.....	23
3.3	SUMMARY OVERVIEW OF COUNTRY-LEVEL RECOMMENDATIONS	24
4	BRAZIL.....	26
5	CANADA.....	42
6	CHINA.....	58
7	INDIA.....	74
8	JAPAN	90
9	MEXICO.....	106
10	RUSSIA.....	122
11	SOUTH AFRICA.....	138
12	SOUTH KOREA	154
13	US.....	170

List of tables

TABLE 1. MOST AND LEAST VISIBLE THEMES OF MEDIA ARTICLES COVERING THE EU AND EUROPE.....	9
TABLE 2. INFLUENCE OF CHARACTERISTICS OF INDIVIDUALS ON POSITIVE/ NEGATIVE PERCEPTION OF THE EU	20

List of figures

FIGURE 1. LACK OF AWARENESS OF THE EU	7
FIGURE 2. FREQUENCY OF GETTING INFORMATION ABOUT THE EU.....	8
FIGURE 3. MAIN SOURCES OF GETTING INFORMATION ABOUT THE EU	8
FIGURE 4. MONTHLY AVERAGE OF MEDIA ARTICLES COVERING THE EU AND EUROPE.....	9
FIGURE 5. THE MOST RECOGNIZABLE EU/ EUROPEAN COUNTRIES, INSTITUTIONS AND PEOPLE	11
FIGURE 6. THE GENERAL VIEW OF THE EU IN VARIOUS SP COUNTRIES	12
FIGURE 7. EVALUATION OF THE SP COUNTRIES' RELATIONSHIP WITH THE EU.....	12
FIGURE 8. DEGREE OF THE EU'S INFLUENCE, IMPORTANCE AND ATTRACTIVENESS IN SP COUNTRIES	13
FIGURE 9. MOST COMMON DESCRIPTORS OF THE EU	14
FIGURE 10. DESIRABILITY VS LIKELIHOOD OF EU LEADERSHIP ROLE IN GLOBAL AFFAIRS	15
FIGURE 11. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF ECONOMY AND RS&T ACROSS SP COUNTRIES	16
FIGURE 12. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF POLITICS AND SECURITY ACROSS SP COUNTRIES	17
FIGURE 13. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF SOCIAL DEVELOPMENT ACROSS SP COUNTRIES.....	17
FIGURE 14. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF CULTURE ACROSS SP COUNTRIES.....	18
FIGURE 15. KEY LEVELS AND FACTORS FOR EXPLAINING PERCEPTIONS.....	19

1 PERCEPTION OF EU AND EU'S POLICES ABROAD: EXECUTIVE SUMMARY

1.1 Scope and methodology of the study

This study presents an in-depth, multi-method analysis of the perceptions of the EU and Europe in several regions of the world (North America, Latin America and the Caribbean, Asia) with a specific focus on the EU's Strategic Partner (SP) countries: Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, South Korea, and the US.¹ The study explored the perception of both the EU and Europe, because in popular and professional discourse the two are often intertwined. The study was designed to contribute to EU Public Diplomacy outreach activities, so that messages and themes could be fine-tuned to local conditions, facilitating a more meaningful and effective EU engagement globally. It is part of a broader effort undertaken by the Commission in revisiting EU's Public Diplomacy which includes, among others, the development of the EU Global Strategy, rethinking of the EU narrative, as well as the Preparatory Action 'Culture in EU External Relations'.

The research team developed an analytical framework consisting of the research criteria, target groups, main themes as well as explanatory variables. The study addressed the research criteria of visibility (including awareness), actorness, effectiveness, local resonance and discussed the EU/ Europe as a norm-setter. The key themes and sub-themes included: economy, trade, politics and security, internal social development and international aid, culture, education, migration and multiculturalism, environment and energy, research, science and technology. Among the target groups/ audiences considered in the study were youth, business, policy makers, academia and think tanks, civil society and media. Finally, the team considered various explanatory factors, from global (geopolitical context, economic interdependence), to country-level (culture, history, political system) and individual-level variables (age, gender, contact with Europe and others).

Methodologically the study followed a research design that consisted of several building blocks: 1) an extensive literature review; 2) media analysis of three selected newspapers in each SP country during April-June 2015; 3) social media analysis around three EU-related events in 2015; 4) public opinion poll in each SP country (in official languages; two languages in Canada and multiple languages in India, fieldwork in August 2015) and 5) non-representative elite interviews carried out in May-July 2015 that helped to discover local explanations for the main findings.

1.2 Summary findings

Visibility analysis showed that the general public in the US, Canada and Japan tends to hear about the EU less frequently as compared to the other SP countries, such as China, Brazil and, in particular Russia. TV was the most popular channel of EU news across most countries, followed by online media (which likely includes online versions of newspapers and magazines), print media and social media. Economy has been the most visible theme in print media, followed by

¹ At the time of writing the European Union had official strategic partnerships with 10 countries; this status entails holding regular meetings at the heads of state level and undertaking numerous other activities encompassing trade, politics and culture.

political, social (including migration) and cultural issues. Media reports on the EU/ Europe focused mostly on dramatic events and crises, such as the European sovereign debt crisis and (the threat of) Grexit, elections in the UK and (the threat of) Brexit as well as the migration/refugee crisis. Notably, there were very few media reports concerning EU's intentions and actions in fields such as research, science, technology, environment and education. EU's role in international development has also been mostly invisible despite the EU being the world's biggest donor. While the media focus on dramatic and current events is understandable, this presents a problem for Public Diplomacy, as the EU is frequently seen as mired in and reacting to crises, while its longer-term efforts are barely noticed.

We used the **actorness** criteria to discuss what kind of actor the EU is perceived to be: whether it's seen as active, important, influential or not so. The majority of public opinion survey respondents across the SP countries had an overall positive view of the EU and described the relationship between their country and the EU as good or very good, with a notable exception of Russia, where negative perceptions were reported, possibly in relation to Russia's role in the Ukrainian conflict, EU's reaction to its annexation of Crimea and the ensuing economic sanctions. Across various themes from global economic affairs to climate change and technological progress, the EU was mostly assessed as somewhat or very influential or important. There was also a tendency for less positive answers in Russia and, to a lesser extent, in Japan. The data shows that in terms of influence and importance, the EU is usually perceived as falling behind the US, the UN and, in the case of bigger global player countries, the respondents' own country, yet in many cases it is rated higher than other big countries and international organisations.

Public opinion survey results show that EU countries are seen as somewhat to very attractive in terms of their **culture and lifestyle** (around 70-80 per cent of responses in all SP countries, including Russia). Indeed, as affirmed by other sources used in this study as well as previous research such as the Preparatory Action 'Culture in EU External Relations', European culture is an influential point of attraction for, and in demand by stakeholders across the world that highly value Europe's cultural diversity.

Survey respondents were also asked to choose words that they felt best describe the EU. **'Multicultural'** was the adjective chosen most frequently across the sample countries; it ranked first in the US, Canada, China, Mexico and Japan; second in Russia; third in Brazil, South Korea and South Africa. A more detailed statistical analysis showed that multicultural may be understood both in a positive and a negative way – it means that this word was used both by respondents more likely to choose positive descriptors as well as those likely to opt for the negative. Among the other adjectives, 'modern' and 'strong' were commonly associated with the EU as well.

Effectiveness is linked to actorness but goes a step further and asks more specifically whether the EU is perceived as being successful/ performing well in specific fields and on specific issues. Survey respondents agreed that the EU is an important trade partner for their countries and overall was performing fairly well on global trade; tourism was seen as an economic field where the EU performs best, while respondents were relatively more sceptical with regards to the EU's success in space exploration technologies and agriculture. In **politics and security**, the EU's performance on media freedom as well as justice and rule of law received relatively more positive assessments, while its support to developing countries and dealing with refugees/displaced people was viewed relatively less positively. In **social development**, the EU was seen as performing well on its overall quality of life, level of education as well as equality between men and women. However, EU's performance on integration of refugees (and displaced people) as

well as protection of minorities, eradication of poverty and reduction of income inequalities was seen less positively. In the broad realm of **culture**, respondents rated all relevant areas positively and in particular the EU's/ European monuments and museums, history, arts, luxury goods and clothes. Indeed, analysis of various survey questions and other sources suggests higher appreciation among the SP countries of the historical facets of the EU (monuments, history, all types of art) rather than the modern.

Despite the vivid academic discourse, the EU was rarely seen as a **norm setter** across the building blocks of the public opinion survey, media analysis and elite interviews. The EU was perceived as an international norm setter in few areas, such as renewable energy technology, equality between women and men and gay rights. Interviewees expressed doubts about the applicability of EU norms in their respective local contexts.

We identified **explanatory variables** at various levels that may explain perceptions in the SP countries. These are, in particular individual/ socio-economic characteristics, country-level characteristics such as cultural and historic ties to Europe, as well as global factors. **Age** seems to matter in various countries, with younger respondents holding somewhat more positive views on the EU in Canada, India, the US and South Africa, while older people tend to have more positive perceptions in Brazil, China, Japan, Mexico, Russia and South Korea. **Gender** tends to have some influence on responses, with women apparently less aware about and/ or having more negative views in most SP countries. Income, working status and level of education also tends to have some (albeit weak) influence on responses. Meanwhile, people with **contact with Europe** (having lived, visited or with relatives living in the EU) usually have more positive attitudes as well as those who felt sufficiently informed about the EU.

History plays out very differently in the SP countries: while there is evidence that common historical ties increase mutual understanding and encourage cooperation, the countries with legacy of European colonialism may also see it as an obstacle. While the distinctiveness of **cultural/ social norms** can lead to clashes and conflicts, for instance on human rights (China) or data protection (US), a common cultural heritage can also enhance the willingness to cooperate in various areas ranging from culture, to education and trade (Canada, Mexico). **Political systems** in China and Russia make it difficult to find a common ground with the EU on issues such as democracy and human rights. **Geopolitics** and **economic interdependence** matter too. For example, the US media portrays the EU as an important partner, and Europe as a crucial continent to keep unpredictable Russia under control. In Russian media, the EU is presented as a close 'other' able to impact Russia politically and economically, not least because of the close (albeit strained) economic relations.

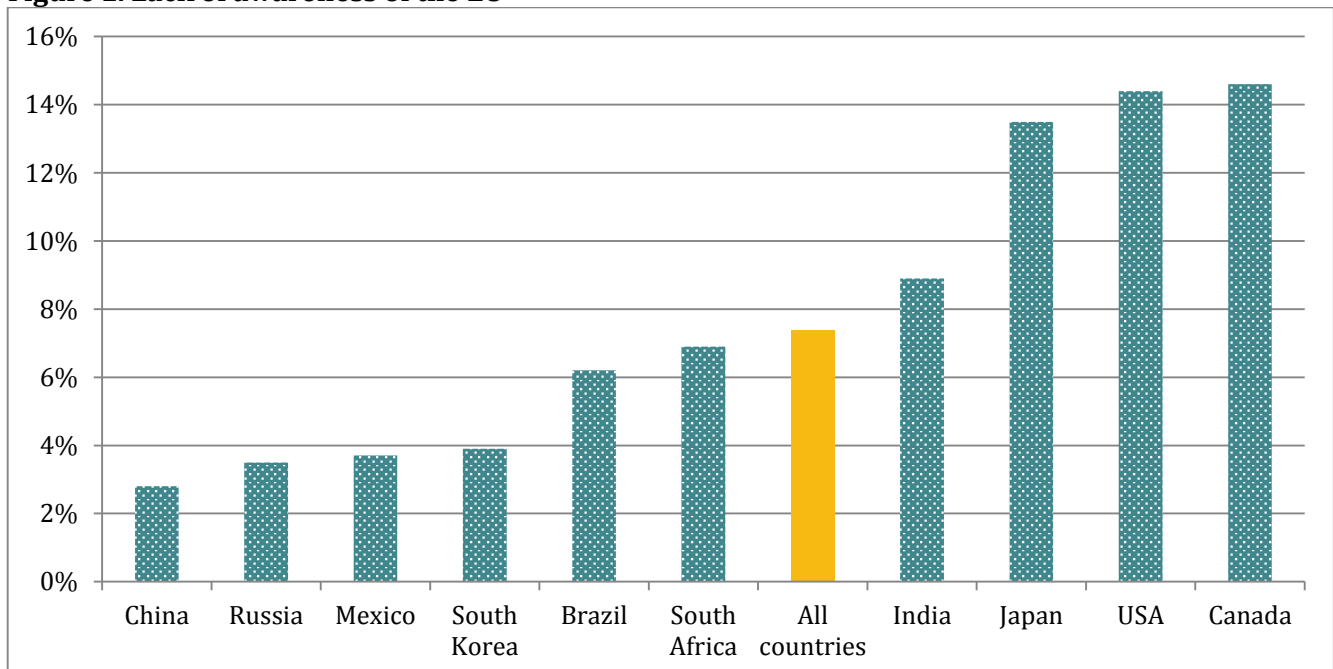
The study **recommends** developing a centralised EU Public Diplomacy strategy comprising a finite set of core messages with the implementation adjusted to local specificities, context and capacities. At the SP level, the EU should devise location-specific media outreach programmes based on messages with a 'local hook', engage in a stratified dialogue with different audiences, address perception of the EU having a 'hearing problem', encourage the development of personal links with the EU and strive for better synergies of PD efforts with the Member States. The decision remains with the policy makers whether to focus on the perceived strengths or weaknesses of the EU as identified in this study as well as to pick out the target groups and audiences to work with. A core target group should be the youth, with a special focus on potential future decision-makers.

2 KEY FINDINGS: COMPARATIVE OVERVIEW

2.1 Visibility

In the public opinion survey we used the percentage of people who do not know/ cannot answer questions about the EU as a useful proxy for awareness. Thus, for example, 2.8 to 14.6 per cent of respondents across SP countries could not answer the question on how positive, neutral or negative they feel about the EU, with the lowest awareness registered in Canada, the US and Japan (Figure 1); the same tendency among countries was noticeable when examining other questions. We also asked survey respondents to express their opinions with regard to other big countries (the US, China, Russia and others) and organisations (the UN, NATO, NAFTA and others). The data shows that in general, awareness of the EU is lower than that of other countries but higher if compared to other international organisations, with an exception of the UN.

Figure 1. Lack of awareness of the EU

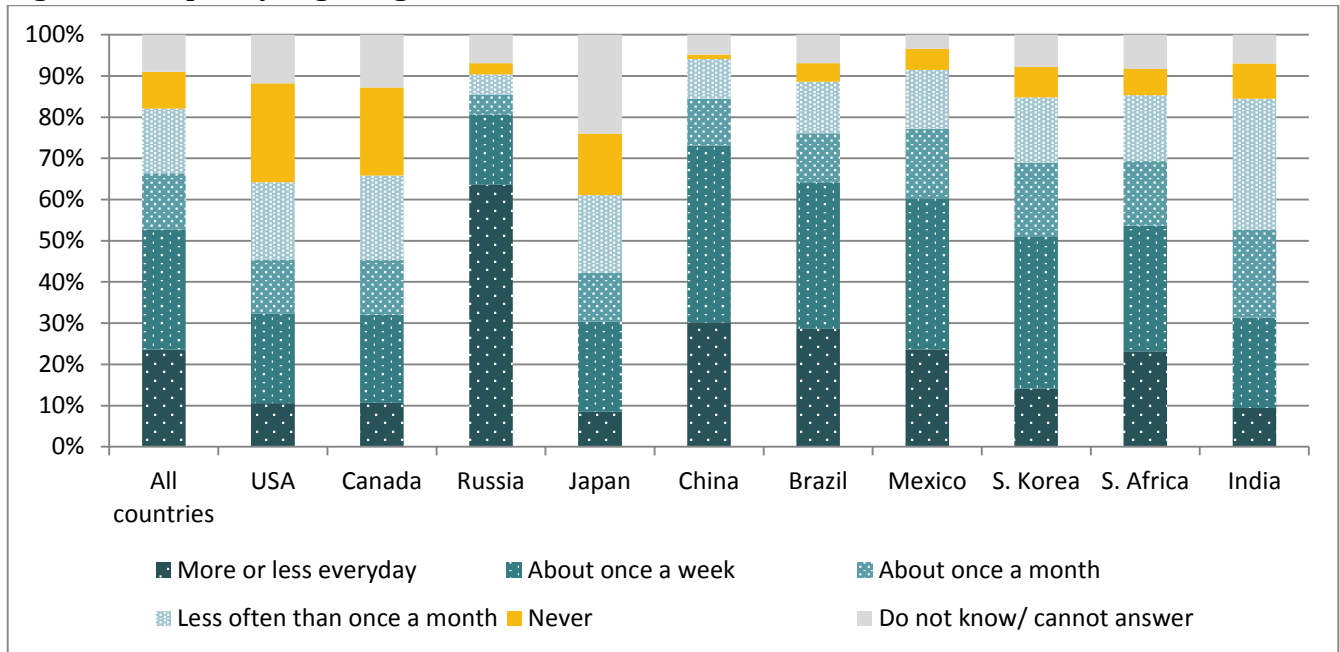


Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations?

Alternatively, awareness and visibility can be measured by looking at the frequency with which the general public across SP countries get information about the EU. Based on this measure, EU's visibility is again lowest in the US, Canada and Japan (Figure 2). Meanwhile, the general public in Russia, China and Brazil hear about the EU quite frequently.

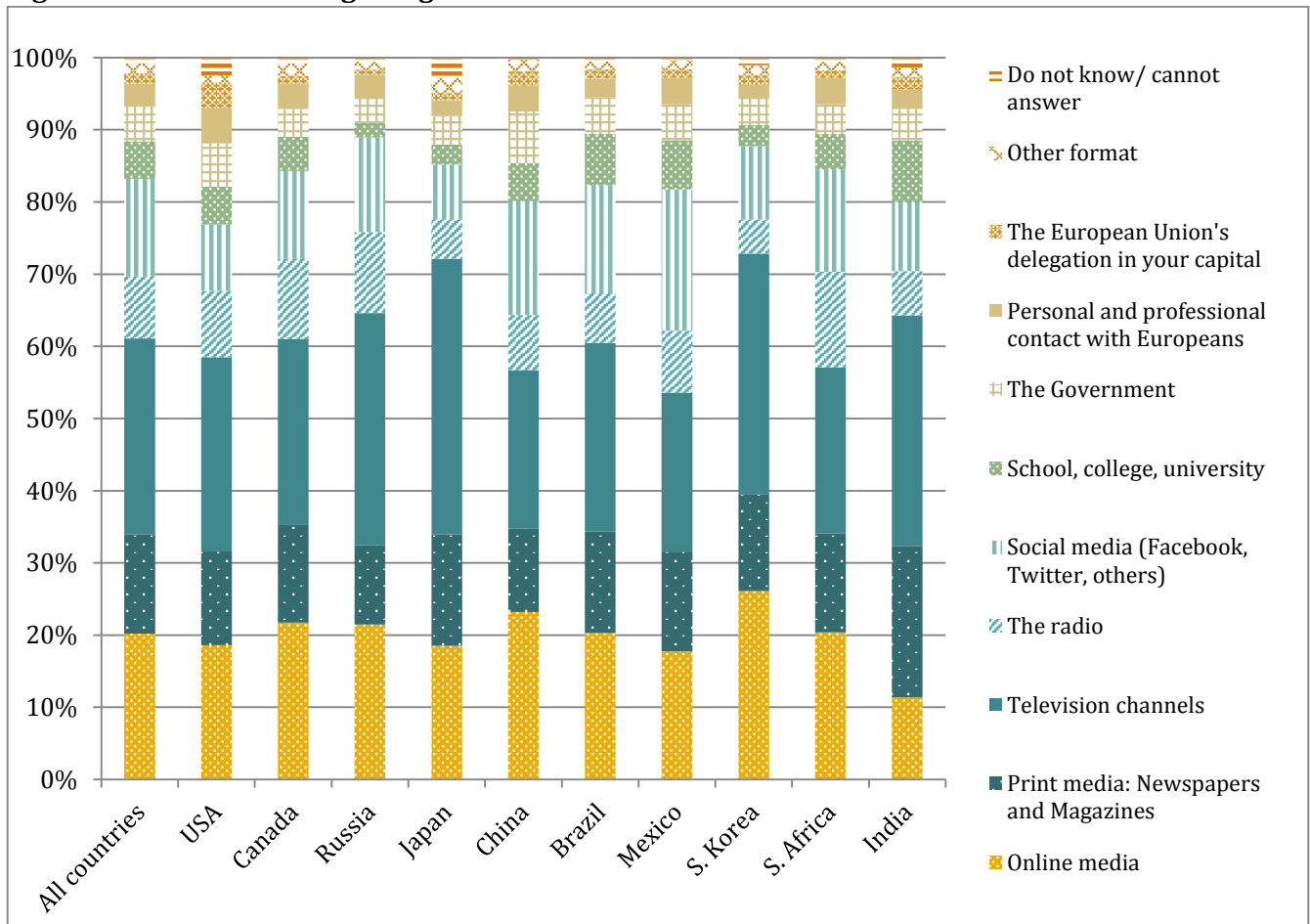
Regarding the key channels of information, TV was the most popular channel of EU news across most countries, followed by online media (which likely includes online versions of newspapers and magazines), print media and social media. Other forms of information were less important (Figure 3). In the US, Canada and South Korea, the top three information sources were TV, online and print; in Brazil, Russia and South Africa – TV, online, social media.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth...

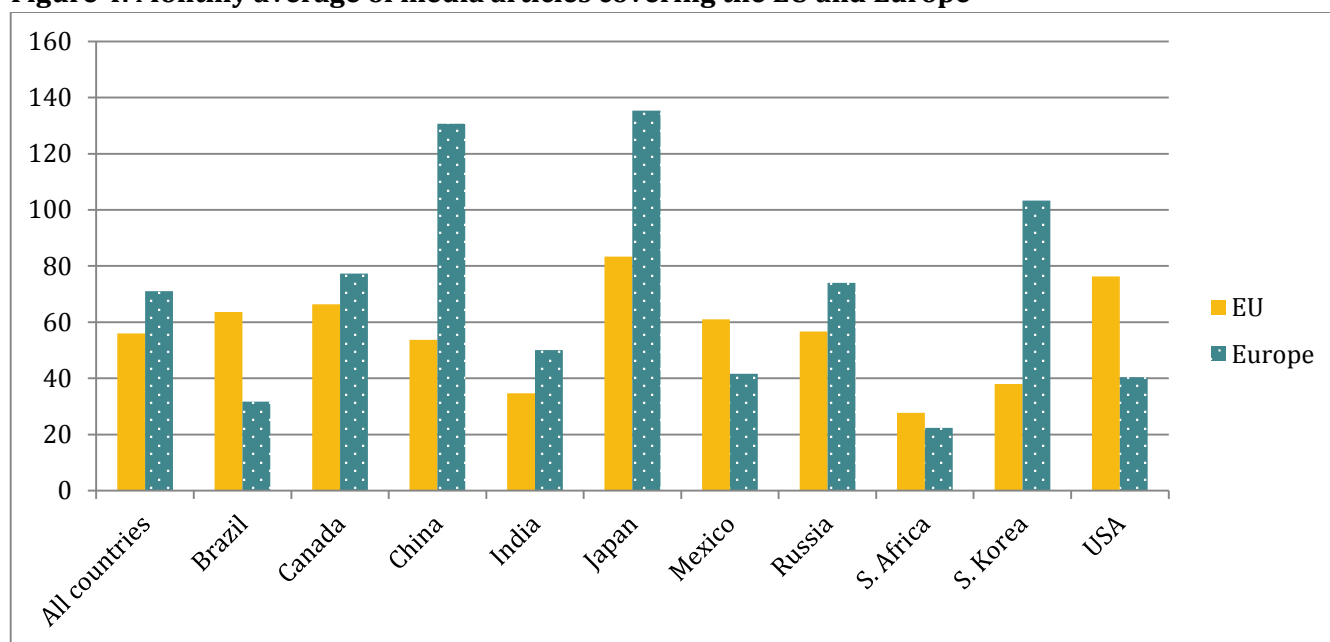
Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole?

Turning specifically to **media analysis**, several **patterns** of EU's visibility have been identified, based on article length, placement of the EU, degree of centrality, and visual support: 1) pronounced visibility (US and South Korea); (2) heightened visibility (Brazil, Mexico, South Africa and India); 3) partial but local visibility (China, Russia, Japan) and 4) nominal visibility (India and Canada). The **highest volume** of media articles has been detected in Japan, US, Canada and Brazil (Figure 4). This does not resonate with the awareness/ visibility data as presented above, which can be explained by the fact that our media analysis focussed on three respected (elite) newspapers, while TV has been the key channel on EU-related news for the general public in most countries.

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on selected print media outlets in target countries during the period April-June, 2015.

Economy has been the most visible theme in print media in most Strategic Partner countries, followed by political, social (including migration) and cultural issues (Table 1). Only in the US, Japan and Mexico, politics was a more visible frame than the economy. In comparison, in **social media**, politics, society and culture were the main thematic frames – which is clearly linked to the events selected for analysis: Europe Day, the G7 meeting in June and the EU Summit in June.

Table 1. Most and least visible themes of media articles covering the EU and Europe

	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
EU										
1	Economy	Economy	Economy	Economy	Politics	Politics	Economy	Economy	Economy	Politics
2	Politics	Politics	Politics	Politics	Economy	Economy	Politics	Politics	Politics	Economy
3	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Normative	Soc&Cult	Energy	Soc&Cult	Soc&Cult	Soc&Cult
Europe										
1	Economy	Economy	Economy	Economy	Economy	Economy	Soc&Cult	Economy	Economy	Politics
2	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Economy	Soc&Cult	Soc&Cult	Economy
3	Politics	Politics	Politics	Politics	Politics	Politics	Politics	Politics	Politics	Soc&Cult

Note: Based on selected print media outlets in target countries during the period April-June, 2015

Media reports on the EU/ Europe focussed mostly on **dramatic events and crises**, such as the European sovereign debt crisis and (the threat of) Grexit, elections in the UK and (the threat of) Brexit as well as the migration/ refugee crisis. Issues related to negotiating Foreign Trade Agreement (FTA) agreements were also noticed in the media (Canada, Japan, South Korea and the US) as well as high level visits and events, such as the EU-China Summit, Federica Mogherini's visit to Beijing, the EU-CELAC Summit. The most frequently reported topics of EU's external engagement focused on it acting towards global hot spots: Ukraine, Russia and Iran (for example, in Canada, the US, Brazil, Mexico, China, South Africa, Korea and Japan). Importantly, media in each location has its own 'hierarchy' of hot spots reflecting the national contexts and geo-politics.

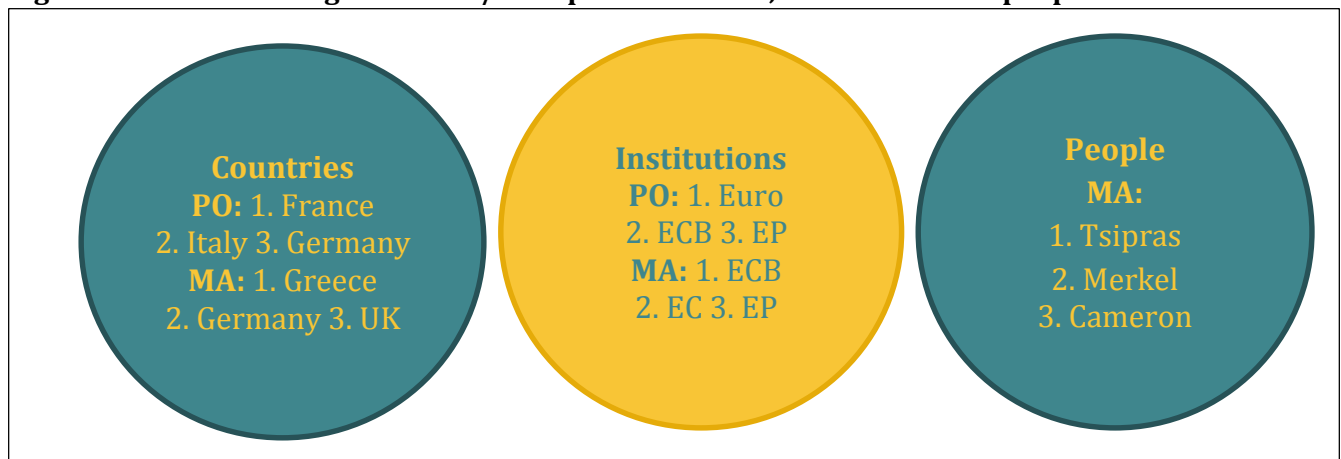
Notably, there were very few media reports concerning the EU's intentions and actions in fields such as **research, science, technology, environment** and **education**. EU's role in **international development** was also mostly invisible despite of the EU being the major global donor. **Energy** attracted more media attention only in Russia – due to both its economic and political importance to bilateral relations. While the media focus on dramatic and current events is understandable, this presents a problem for Public Diplomacy as the EU is frequently presented as mired in, and reacting to crises while its longer-term efforts are barely noticed. As demonstrated by the interviews, only a narrow circle of interested experts, professionals, academics and civic society leaders feel informed about EU involvement in these fields and can comment on it.

While the terms Europe and the EU are sometimes used as synonyms, both media analysis and the public opinion survey also revealed some **distinct patterns**. Specifically, the EU is primarily associated with political, economic (in particular, the state of the economy) and social (including migration, refugees) spheres. Meanwhile, Europe is connected more with history, used as a geographical reference for economic activity, travel and tourism, social development, lifestyle, arts, sports and science. Overall, media portrayed Europe with a higher visibility in **cultural affairs** than the EU. In all SP countries Europe was seen with reference to art and culture both in terms of popular and high culture – articles covered European rock bands, classical music, movies, literature, exhibitions, architecture, performers, artists, etc. This visibility, while not unexpected, confirmed the assumption that Europe exhibits a globally recognised cultural reputation. In China and South Korea, for example, a significant share of Europe's positive coverage referred to European culture (film, cuisine, architecture).

In the media, the most visible Member States were Greece, Germany, Britain and France – due to the major events unfolding in these countries during the period of observation (including the commemoration of WWI and WWII in France). Meanwhile, in the public opinion survey, which shows more long-term and deep-seated perceptions, respondents were asked to name countries that are the most attractive to them. SP country general publics pointed predominantly towards the big, powerful, wealthy countries with history of bilateral cooperation, conflict and, frequently, colonialism: France, Germany, Italy, Britain and to a lesser extent – Portugal and Spain. The most visible EU institutions in the media were the ECB and the European Commission (EC). This corresponds to the survey data where respondents most frequently mentioned that they have seen, heard or read about the Euro, the ECB and the EC. Most survey respondents also mentioned hearing about the European Parliament (EP) (exceptions: India, Canada, the US and Japan) although based on the media data it was rarely in the spotlight during the period of observation (Figure 5).

The most visible **EU officials** in the media were Mario Draghi (President of the ECB, in particular in the revolving reportage of the Greek economic crisis), Jean-Claude Juncker (President of the European Commission) and Donald Tusk (President of the European Council). EU Competition Commissioner Margrethe Vestager had a heightened profile due to what was perceived as her tough stance towards Google. Similarly, EU High Representative Federica Mogherini gained a noticeable profile in relation to news reports concerning the migration crisis. The respective leaders of the most visible (in the media) Member States: Angela Merkel, Aléxis Tsípras, François Hollande and David Cameron received substantial profiling in news stories, and this visibility was enhanced by supporting visual images.

Figure 5. The most recognizable EU/ European countries, institutions and people



Note: Based on selected print media outlets in target countries during the period April-June, 2015.

2.2 Actorness

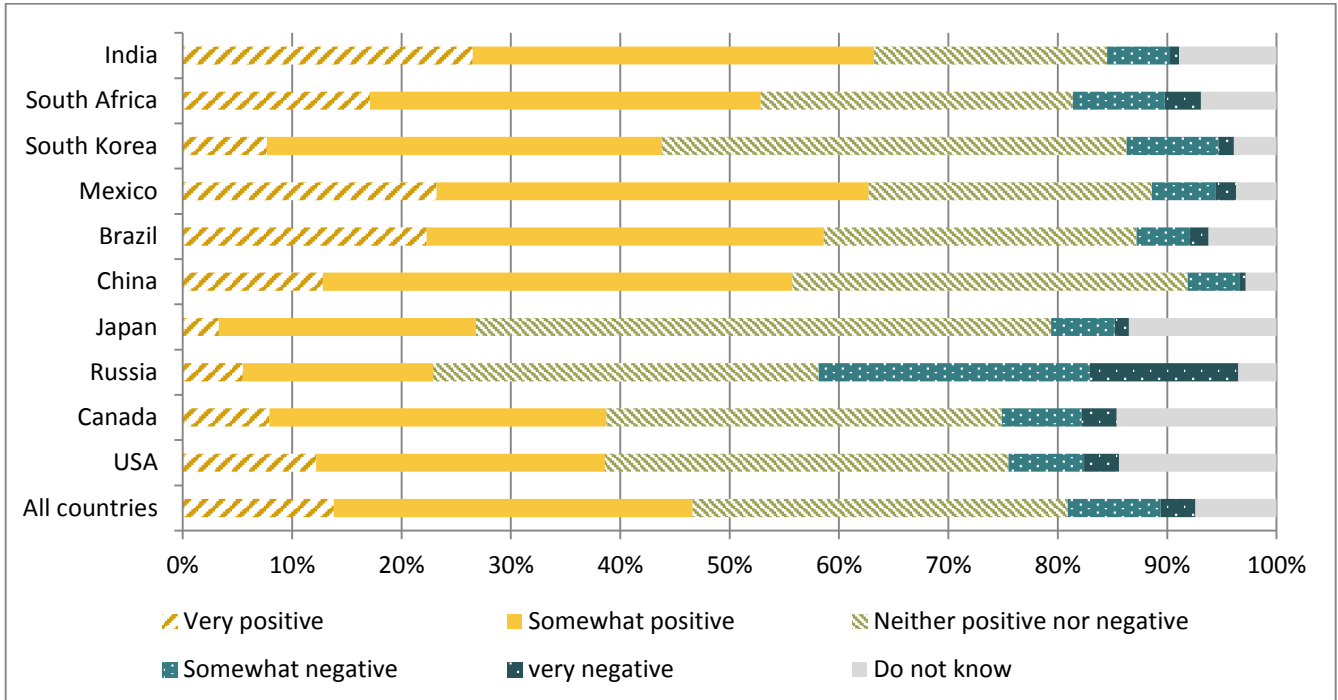
We used the actorness criteria to discuss what kind of actor the EU is perceived to be: active, important and influential or not so.

The majority public opinion survey respondents across SP countries had an overall **positive view** of the EU, except for Russia, where only 23 per cent of respondents felt positive or very positive about the EU, and more respondents felt negative than positive (Figure 6). Furthermore, most respondents described the **overall relationship** between their country and the EU as good or very good, with once again a notable exception of Russia, where negative perceptions were reported, possibly due to Russia's role in the Ukrainian conflict, EU's reaction to its annexation of Crimea, and the ensuing economic sanctions (Figure 7). In Japan, South Korea and South Africa, there were relatively fewer positive views (around 40 per cent), due to much more people choosing neutral 'neither good, nor bad' rather than negative answers. Interestingly, the general public in Canada and the US evaluates bilateral relations between their respective countries and the EU much more positively than the EU in general. The opposite is true in Mexico, Russia and South Africa.

We also analysed **thematic trends**, asking how influential or important or attractive the EU is in various fields, from global economic affairs and global peace to climate change, culture, support to developing countries and technological progress (Figure 8). The trend was the same: most respondents in all SP countries provided positive answers; there was also a tendency for less positive answers in Russia, and, to a lesser extent, in Japan. Respondents were also asked to

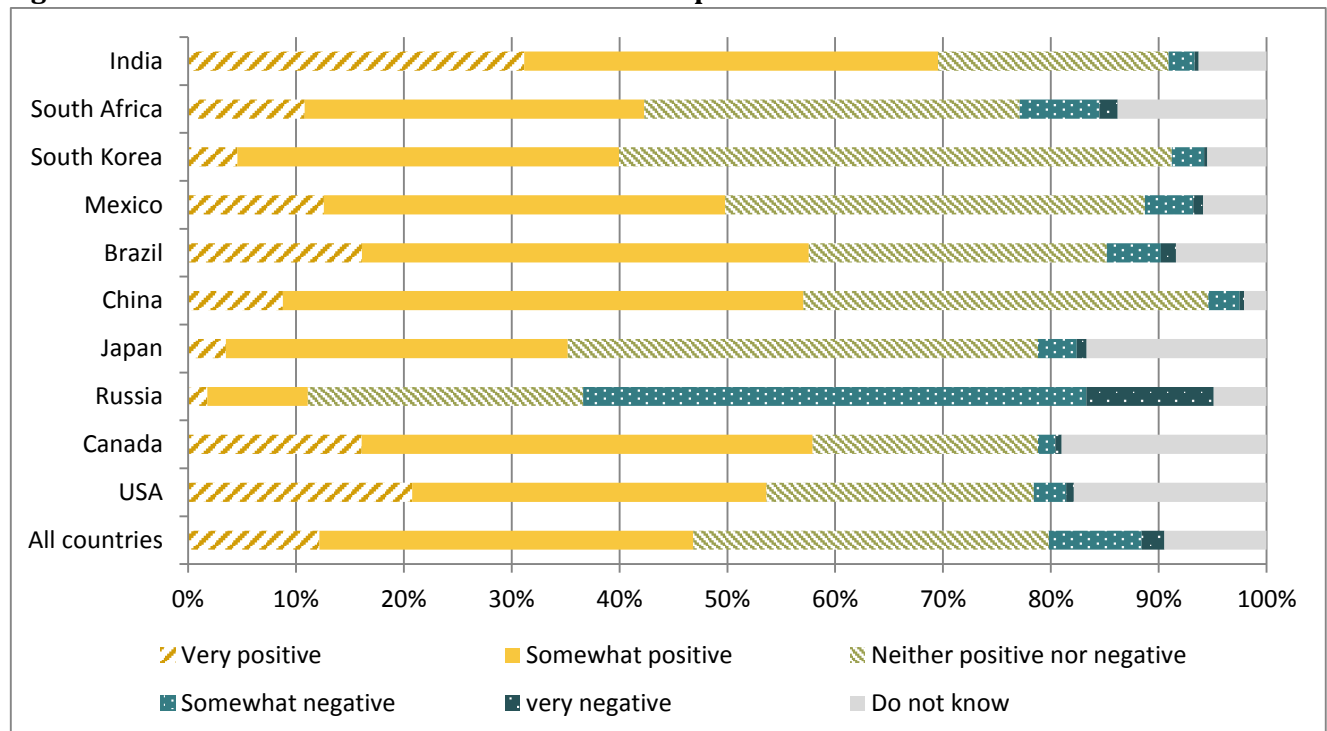
answer similar questions with regard other major powers and key international organisations. The data shows that the EU is usually perceived as falling behind the US, the UN and, in the case of larger global players, the respondents' own country, yet in many cases it's rated higher than other big countries and international organisations.

Figure 6. The general view of the EU in various SP countries



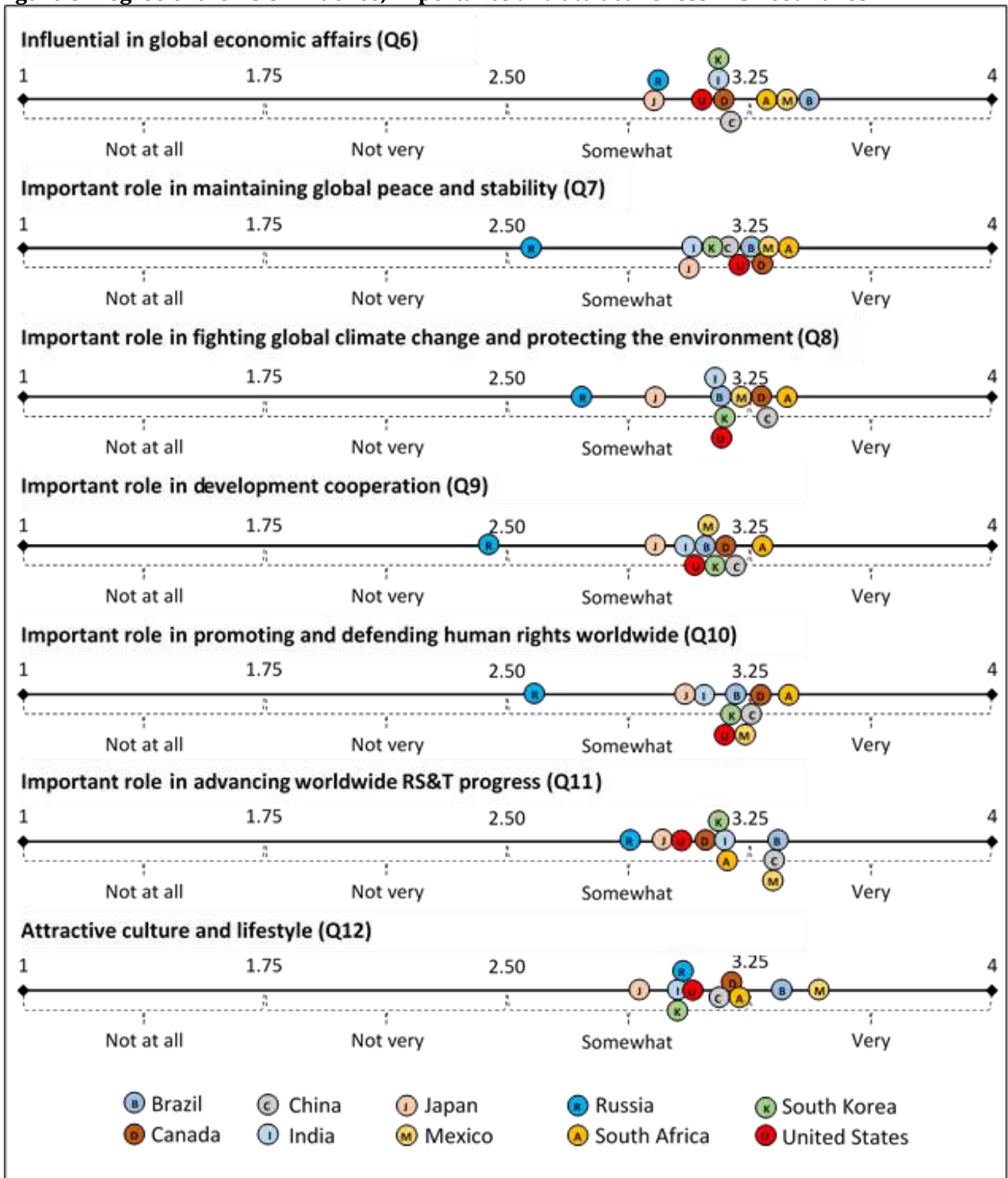
Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations?

Figure 7. Evaluation of the SP countries' relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations?

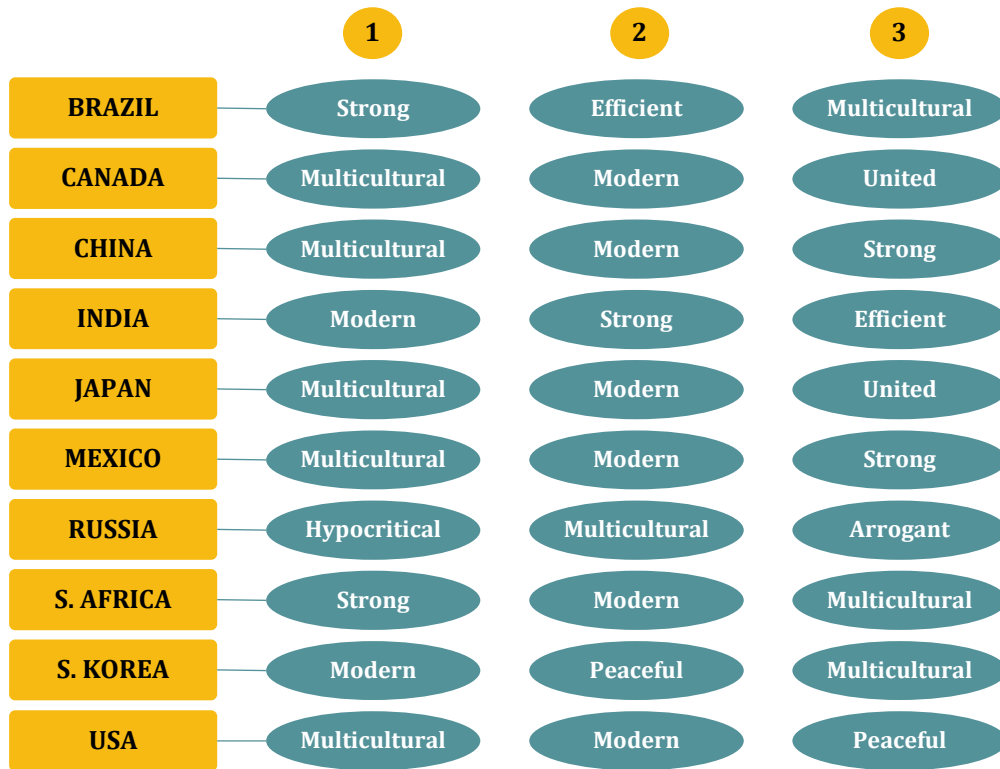
Figure 8. Degree of the EU's influence, importance and attractiveness in SP countries



Note: Based on the answers to survey Q 6-12. The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations: [the EU] Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability: [the EU] Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment: [the EU] Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world: [the EU] Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity: [the EU] Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world: [the EU] Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle: [the EU].

Public opinion survey respondents were also asked to choose words that they felt best describe the EU. **'Multicultural'** was the adjective chosen most frequently across countries; it ranked first in the US, Canada, China, Mexico and Japan; second in Russia; third in Brazil, South Korea and South Africa. Interestingly, Latent Class Analysis showed that multicultural may be understood both in a positive and negative way – it means that this word was used both by respondents more likely to choose positive descriptors as well as those likely to opt for negative ones. Among other adjectives, **'modern'** and **'strong'** were commonly associated with the EU. Interestingly, the EU was not seen as modern in either Russia or Brazil, while countries like the US, Canada, Russia, Japan and South Korea didn't see it as strong. Other words used to describe the EU were 'peaceful', 'efficient' and 'united'. While on the whole respondents across countries overwhelmingly chose positive adjectives, Russia is an outlier; in this case the words 'hypocritical' and 'arrogant' were frequent choices.

Figure 9. Most common descriptors of the EU



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.

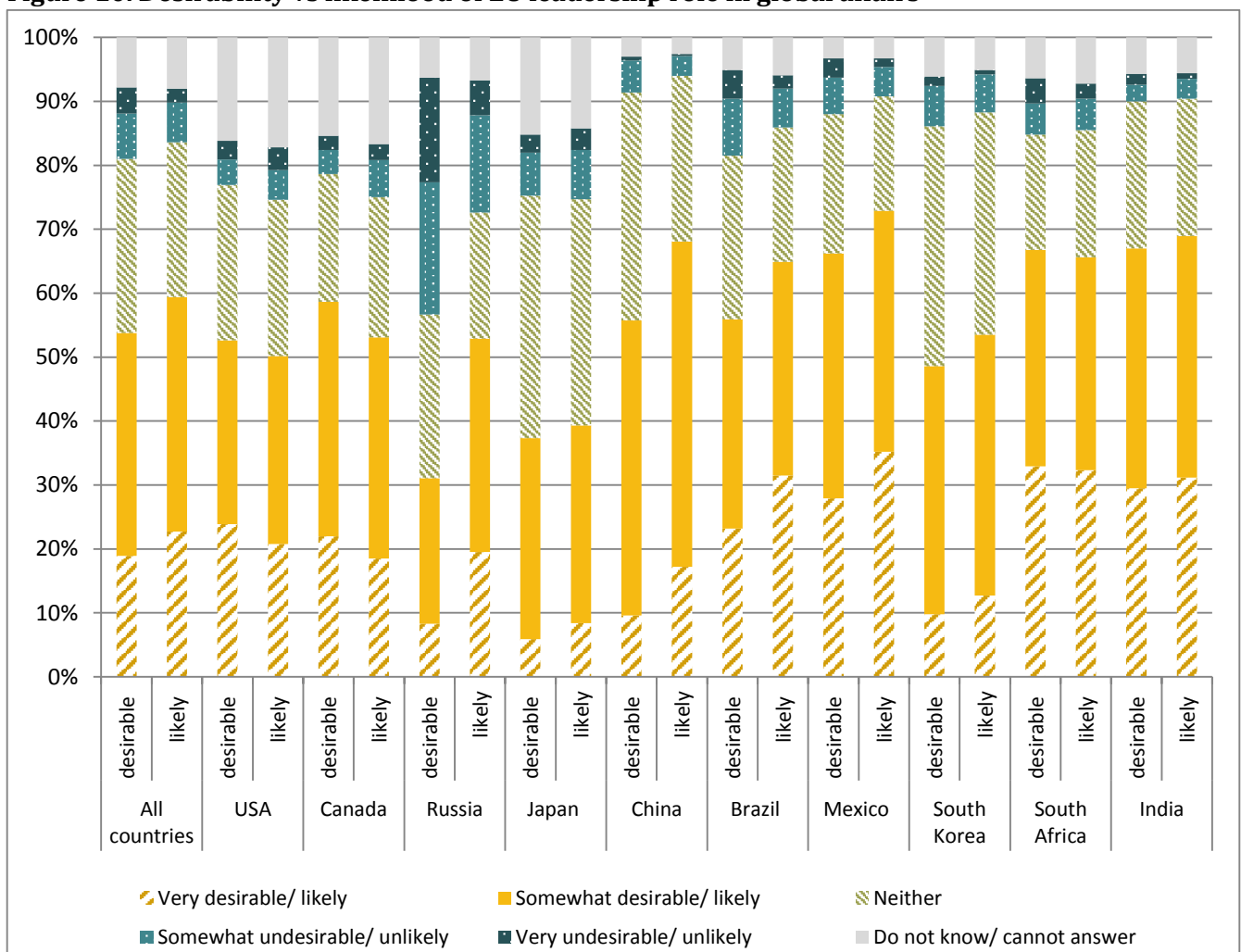
Media analysis, however reveals some of the current metaphors used to describe Europe and the EU. Given the media's focus on dramatic current events during the media monitoring period, negative metaphors were very frequent. EU's economy was often compared to a **sick person**, threatening to spread its economic ills globally (noted in the US, Canada, Russia, China, South Africa). Another popular metaphor was **unstable structure** in danger of collapse (Brazil, Mexico). The EU was also described as engaged in **economic battles** trying to fight its way out of the crisis (Canada, China, South Korea). In politics, there were metaphors of **disintegrating**

fabric (US, Korea, Russia), **battle** (Brazil, China, South Africa) and a **wounded person** (India). An image of the **'Fortress Europe'** also re-emerged (US). In the social frame, the most typical metaphor was a **flood**, with a tidal wave of refugees crashing on the shores of the EU.

2.3 Effectiveness

Effectiveness is linked to actorness, but goes one step further and asks more specifically whether the EU is perceived as being successful/ performing well in certain fields and on specific issues. As a proxy for EU's global effectiveness we asked how likely or unlikely the EU is to assume a **strong leadership role** in world affairs five years from now, as well as how desirable it would be for the EU to take this role (Figure 10).

Figure 10. Desirability vs likelihood of EU leadership role in global affairs



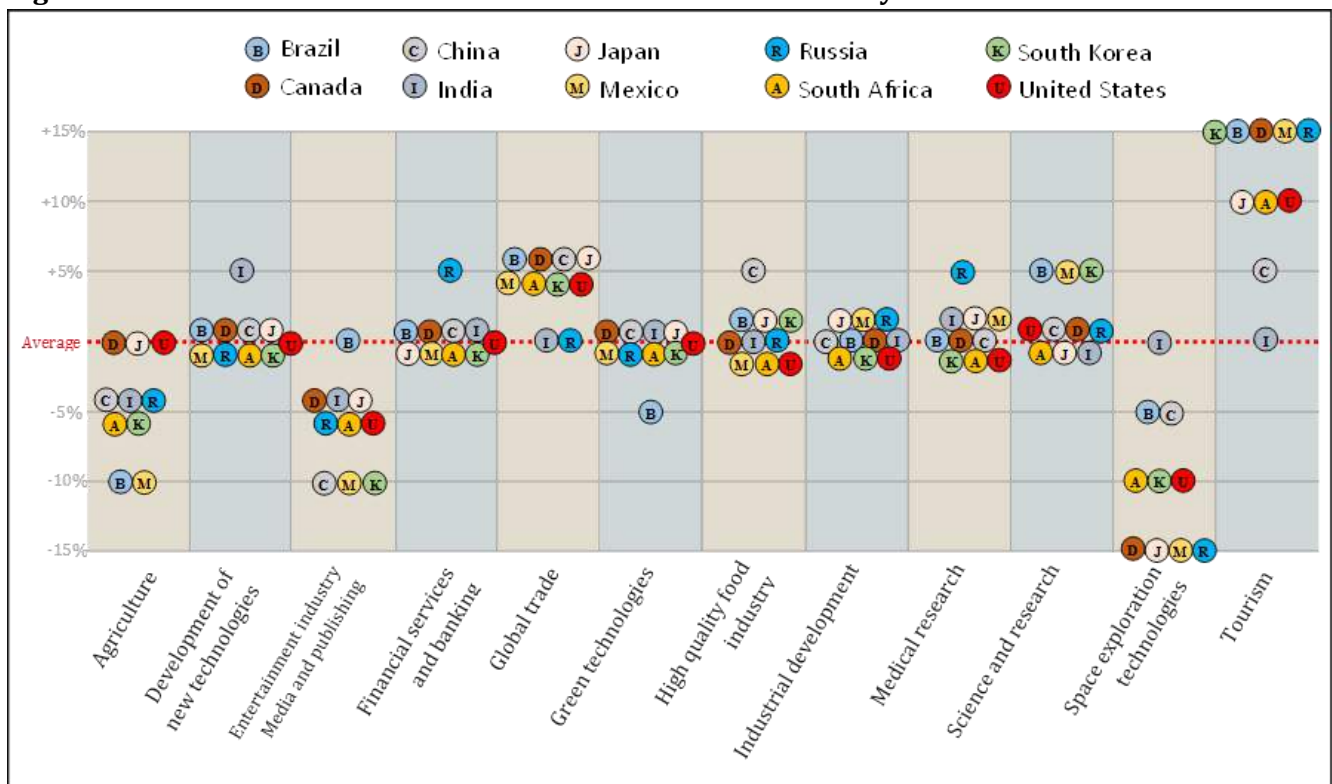
Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now?

Most respondents across SP countries argued that EU's leadership role in world affairs is both desirable and likely. Russia once again presents an outlier with 37.1 per cent of respondents choosing to say that EU's global leadership is somewhat to very undesirable and 20.7 per cent – rather or very unlikely. In Japan, South Korea, Canada and the US a very significant part of

respondents (around 35-50 per cent) opted for 'do not know' or 'neither nor' answers (Figure 10).

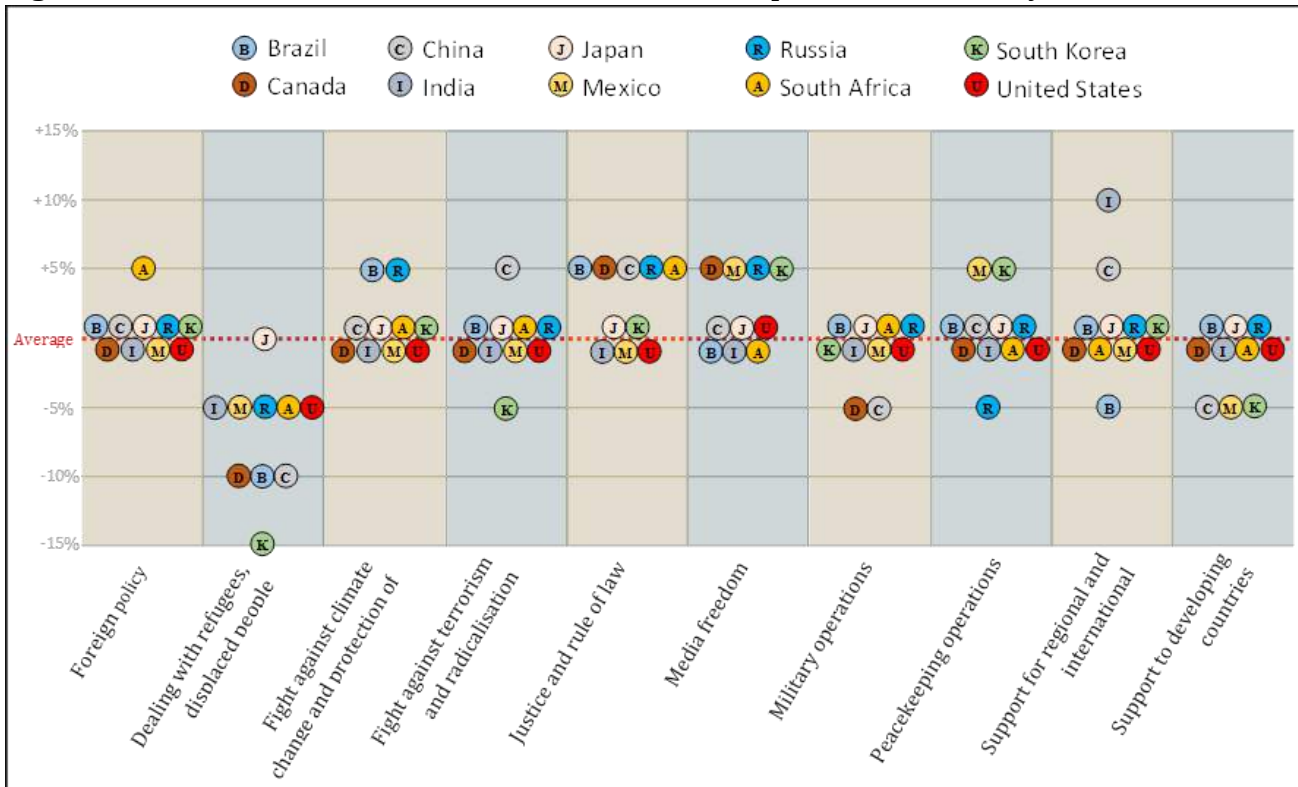
When it comes to **EU's performance** in the **field of economy**, most respondents agreed that the EU is an important trade partner for their countries and overall performs fairly well in global trade. Tourism was seen as an important economic activity for the EU, as well as the economic field in which the EU performs best compared to other areas. Respondents were relatively more sceptical with regards to EU's performance in space exploration technologies and agriculture (Figure 11). When it comes to **politics and security**, the EU was perceived as performing fairly well. The EU's performance in media freedom as well as justice and rule of law received relatively more positive assessments within countries, while its support to developing countries and dealing with refugees/ displaced people was viewed relatively less positively (Figure 12). In **social development**, the EU was seen as performing well in ensuring good overall quality of life, level of education as well as equality between men and women. However, EU's performance in relation to dealing with refugees (and displaced people) as well as protection of minorities, eradication of poverty and reducing income inequalities was seen less positively as compared to other areas of social development (Figure 13).

Figure 11. EU effectiveness in different thematic fields of economy and RS&T across SP countries



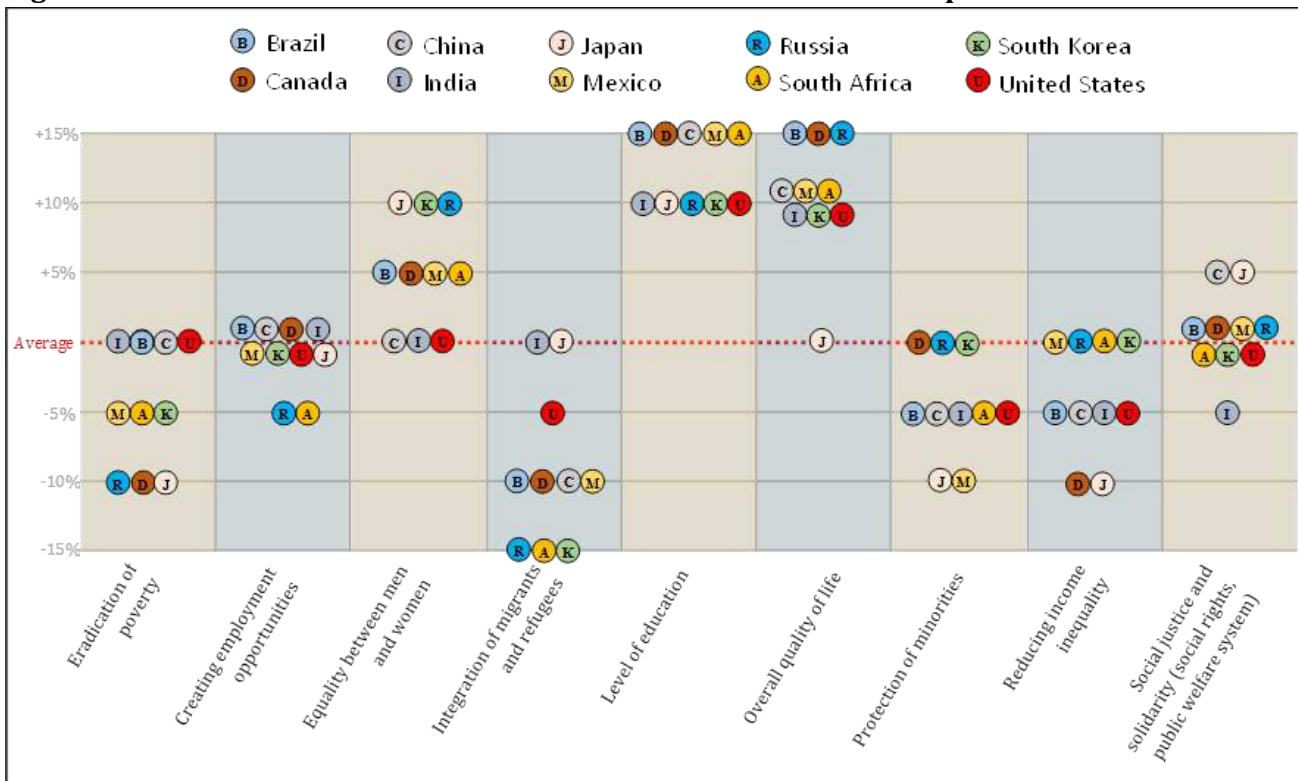
Note: Based on the survey Q13: How well do you think the EU performs in terms of the following areas of economy, trade, research and technology...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

Figure 12. EU effectiveness in different thematic fields of politics and security across SP countries



Note: Based on Q15: How well do you think the EU performs in terms of the following political areas...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

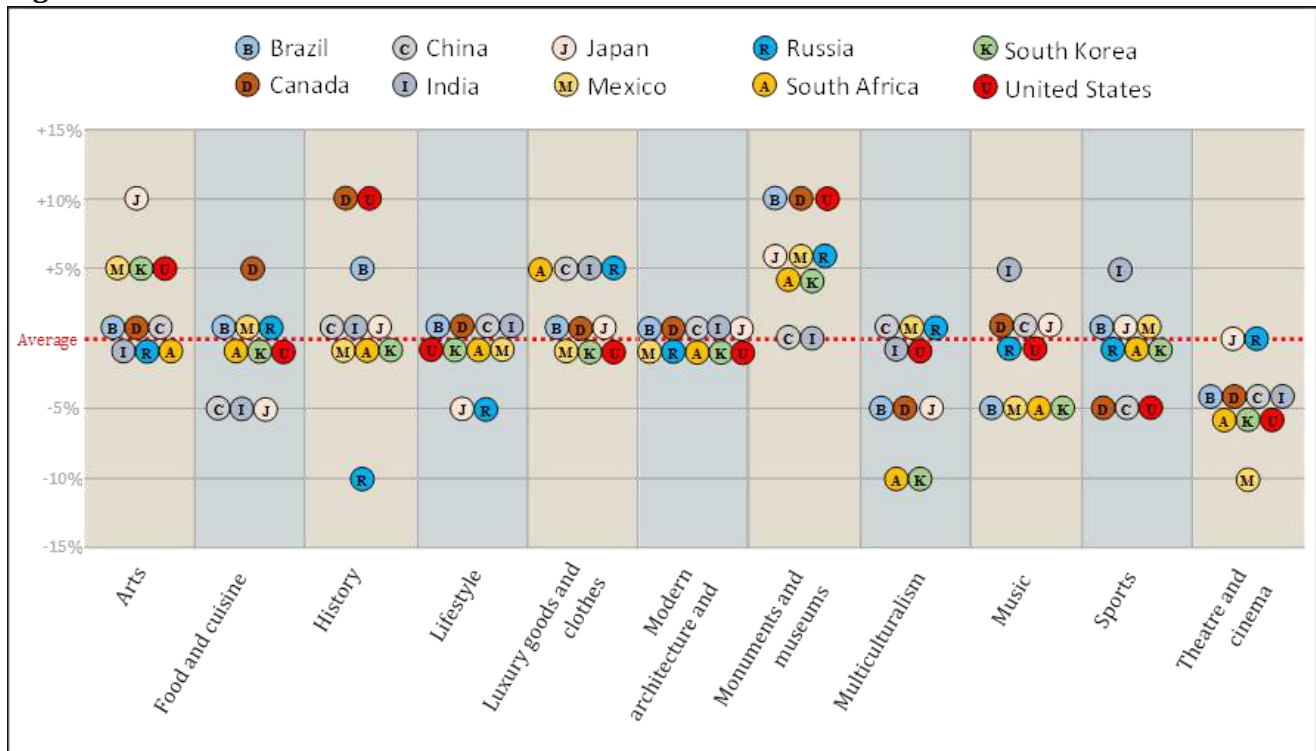
Figure 13. EU effectiveness in different thematic fields of social development across SP countries



Note: Based on Q17: How well do you think the EU performs in terms of the following areas of social development...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

In the broad realm of **culture** respondents rated all relevant areas positively and in particular the EU's/ European monuments and museums, history, arts, luxury goods and clothes which were rated above theatre and cinema, music, sports, food and cuisine (Figure 14). The analysis of various survey questions and other sources suggests higher appreciation among the SP countries of the historical facets of the EU (monuments, history, all types of art) rather than the modern. For example, the EU's performance in the entertainment industry was evaluated less positively in most of the countries (with the exception of Russia and Japan) as compared to other fields of economic activity (Figure 11 above).

Figure 14. EU effectiveness in different thematic fields of culture across SP countries



Note: Based on the survey Q19: How well do you think the EU and Europe as a whole performs in terms of the following fields of culture and sports...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

The public opinion survey shows more long-term and abstract perceptions. **Media analysis** reveals current assessments as to how the EU doing. While overall the assessments of the EU and Europe in the media tend to be mostly neutral, quite a large number is also negative, which is understandable given the media's focus on topical dramatic events and crises. Therefore, in all countries the three most visible frames (politics, economy, social affairs) tended to attract more negative than positive evaluations. In particular, the **economic crisis** confronting Greece was an on-going theme as well as the **political crises** of 2015 (potential Grexit and Brexit). But the most obvious change and a steep rise of negativity in EU media reporting was associated with the **migrant/ refugee crisis**. The media assessed some EU's policies as inhumane, restrictive and even militaristic. In fact, (based on earlier perceptions studies) EU's actions in the social sphere have never been assessed so negatively. This has already had an effect on public opinion as, according to the survey, answers on the EU's performance on refugees and migrant integration have been relatively more sceptical.

Importantly, media has also offered some positive views of the EU. In the **political** field, positive assessments were typically observed when the EU was reported as a key player in the Iran deal. EU's quantitative easing policy and its impact were reported positively when the EU was seen acting in the **economic** sphere. EU's implementation of competition law and establishment of regulatory practices in business, finance and industry were also addressed from a positive angle. A growth in the manufacturing sector of the Eurozone was reported alongside coverage about its recovery. In the **social** frame, EU's communal response to the Mediterranean refugee crisis was sometimes presented from a positive angle: while the solutions may have been criticized, the idea of the institution taking action and addressing it was viewed as positive – for example in Mexico. The EU was also reported as having initiated measures to ensure the protection and evacuation of migrants.

2.4 EU as a normative power

Despite the vivid academic discourse, the EU was rarely seen as a **norm-setter** across the building blocks of the public opinion survey and media analysis. The EU was perceived as an international norm-setter in few areas, such as renewable energy technology, equality between women and men or gay rights. The **social media** analysis however showed that in the context of the three events (Europe Day, G7 meeting and EU summit) images of the EU carried normative features: the EU was associated with the norms of human rights, good governance and sustainable development. The majority of tweets were neutral however the EU's actions around human rights (in particular, treatment of refugees) received a fair share of negative comments. Elite interviewees expressed doubts about the overall applicability of EU norms in their respective local contexts.

2.5 Explaining perceptions

We identified explanatory variables at various levels that help explain perceptions in different contexts. These are, in particular individual/ socio-economic characteristics, country-level characteristics such as cultural and historic ties to Europe, as well as global factors.

Figure 15. Key levels and factors for explaining perceptions



Note: Based on explanatory variables identified in the framework of this study

As concerns **age**, younger respondents hold somewhat more positive views on the EU in Canada, India, US, South Africa, while older people tend to be more positive about the EU in Brazil, China, Japan, Mexico, Russia and South Korea (see Table 2). Regarding **gender**, women tend to be less aware about and/ or have more negative views of the EU in most SP countries with the exceptions of Russia (somewhat more positive views) and China (gender has no influence on

views). **Contact with Europe** (living, visiting or having relatives in Europe) clearly supports more positive views on the EU; in the same vein, people who felt sufficiently informed about the EU tended to have more positive attitudes. When it comes to **income** and **working status**, more positive views were more likely to come from respondents in high income brackets as well as employed persons. Meanwhile, the **level of education** rarely had an effect, except for in Canada, where more educated people were more likely to have positive views, and Russia, where a more positive attitude was more often associated with students and people with a lower level of education.

Table 2. Influence of characteristics of individuals on positive/ negative perception of the EU

	General view of EU	SP country -EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Men ↑ (BR) Women ↓ (MX, ZA)	Women ↓ (CA, IN, JP, MX, ZA, KR, US)	Women ↑ (RU) Women ↓ (US)	Men ↑ (BR) Women ↓ (JP, MX, KR, US)	Women ↓ (IN, JP, US)	Women ↑ (RU)
Age	Older ↑ (BR, KR) Younger ↑ (CA, IN, ZA, US)	Older ↑ (BR, CN, JP, KR) Younger ↑ (ZA)	Older ↑ (JP, MX, RU, KR)	Older ↑ (BR, JP, KR)	Older ↑ (JP)	Older ↑ (BR, JP, MX, RU, KR) Younger ↑ (CN, ZA, US)
Contact with Europe	With contact ↑ (all except IN)	With contact ↑ (all except IN)	With contact ↑ (all except IN)	With contact ↑ (CA, CN, JP, RU, ZA, KR, US)	With contact ↑ (all except IN, MX)	With contact ↑ (all except IN)
Sufficiently informed	More informed ↑ (BR, CA, CN, IN, JP, US)	More informed ↑ (BR, CN, IN, MX, ZA, KR, US)	More informed ↑ (CN, US)	More informed ↑ (IN, US) Willing to learn more ↑ (RU)	More informed ↑ (IN, US) Willing to learn more ↑ (RU)	More informed ↑ (BR, CN, US) Willing to learn more ↑ (RU)
Income	Higher income ↑ (BR, CN, JP, MX, KR, US)	Higher income ↑ (BR, CN, JP, MX, RU, KR, US)	Higher income ↑ (all except CA, JP)	Higher income ↑ (BR, CN, IN, JP, MX, KR, US)	Higher income ↑ (BR, CN, IN, MX, KR, US)	Higher income ↑ (CN, MX, KR)
Level of education	More educated ↑ (CA)	More educated ↑ (CA) Students, less educated ↑ (RU)	More educated ↑ (CA)	More educated ↑ (CA)	More educated ↑ (CA, MX)	Students, less educated ↑ (RU)
Working status	Employed ↑ (BR, CA, CN, MX, KR, US)	Employed ↑ (BR, CA, CN, MX, KR, US)	Employed ↑ (KR, US)	Employed ↑ (MX, KR, US)	Employed ↑ (CN, KR, US)	...

Note: Based on country-specific cross tabulations generated from poll results for analysis of explanatory variables. ↑ respondents tend to have a more positive opinion; ↓ - respondents tend to have a more negative opinion.

On some specific questions, **regional differences** were noticed inside countries; specifically, slightly more positive views were somewhat more likely in Canada's British Columbia; India's Bangalore; Northeast and West of the US; Southern/ North Caucasian Federal District of Russia. In Japan, responses from the Hokkaido region tended to be more negative on some questions.

Among the country-specific factors, **history** plays out very differently in the SP countries: while there is evidence showing that common historical ties increase mutual understanding and encourage cooperation, the countries with a legacy of European colonialism may also see it as an obstacle. Based on interviews and other sources, historic connections to Europe were assessed rather positively in Canada and Mexico. Meanwhile, historical encounters were perceived very

ambiguously in India and Brazil, and overall rather negatively in South Africa. US media still pays special attention to events in the UK, and discusses the special historical relationship between the two countries. Media analysis furthermore showed that World War I and II (Japan, Canada, US, South Africa and India) are important elements shaping Europe's image in the world.

Related to history, **cultural ties** and/ or commonalities entailing common (or diverging) norms and values have an impact on perceptions. While the distinctiveness of cultural/ social norms can lead to clashes and conflicts, for instance on human rights (China) or data protection (USA), a common cultural heritage can also enhance the willingness to cooperate in various areas ranging from culture, to education and trade (Canada, Mexico). Brazil presents an unequivocal picture: while the media appreciates the common culture with Europe, particularly in the arts, literature and cinema, the country also aims to strengthen its distinctive culture instead of stressing its European heritage. In South Africa, cultural closeness to Europe is appreciated but exists in parallel to a feeling of cultural imperialism connected to the European lifestyle. Common values and mutual trust were also mentioned by interviewees in Japan and South Korea, in spite of their perceived distinct culture. Meanwhile, Russian interviewees shared their perception of the EU's 'propagandist culture' that weakens EU-Russia relations.

The **political system** of a country affects the way information is distributed. In the case of China and Russia, the political regime creates a powerful information monopoly through censorship affecting what information is accessible to people. Political systems in China and Russia also make it difficult to find common ground with the EU on issues such as democracy and human rights. In other countries what is perceived as the EU's political system is used to reflect on national specificities, such as different electoral systems (Brazil), protection of human rights, strengthening of administrative structures (Mexico). Finally, the decentralised political structure of Canada makes it easier to understand the operation of the EU.

Geopolitical matters, such as tense security relations with neighbouring countries may determine a country's preferred partner. Brazil, for instance, perceives itself as an emerging power that wants to be taken seriously in the international arena while favouring multilateral approaches. China accentuates the EU's role as counterweight to the US – also in the context of the rising tensions in Northeast Asia, particularly on the Korean peninsula. Japan offers another perspective, highlighting the US' comparatively more important role vis-à-vis China. Similarly, Canada is keen to explore the potential for cooperation with the EU considering shared concerns towards China as well as the EU's lack of hard power. Mexico strives for enhanced cooperation with the EU because it considers Latin America to be politically, socially and economically fragmented and in need of more effective institutions (with the EU presenting a role model). The US media portrays the EU as an important partner, and Europe as a crucial continent to keep unpredictable Russia under control. For Russia itself, the EU plays a crucial role in geopolitics: in the media, the EU is presented as a close 'other' able to impact Russia politically and economically.

Finally, **economic interdependence** is seen as desirable by some, for example to lessen US economic influence (e.g. Canada), or in the context FTA negotiations (e.g. South Korea), while others see EU's influence as risky and self-interested, and caution against too much economic dependency (e.g. South Africa). Russian media and interviewees notice the EU dependence on Russian oil and gas supplies, while at the same time admitting that Russia also depends on its exports to the EU.

2.6 Regional findings

The analysis of data across the building blocks of this study showed that countries stood out with their individual characteristics and regional trends or trends along other groupings such as BRICS have not been identifiable. Media in each country tells a story that is very much linked to the local context or reports on topics (e.g. the migration crisis) that are of interest globally and across all countries. Likewise in the public opinion poll, specific regional nuances could not be detected: across all countries, the general public leans towards similar directions, e.g. negative views spurred by the migration crises. The responses of outliers (such as Russia in many questions) can be traced back to their specific country-context and not their regional embedment. The interviews reflect this: interviewees predominantly referenced their country's context in the relations with the EU and Europe, and emphasised the differences much more than commonalities between their neighbours.

3 POLICY RECOMMENDATIONS

There is a need for a centralised EU Public Diplomacy strategy comprising a finite set of core messages, while the implementation needs to be adjusted to local specificities, context and capacities. The study corroborates suggestions coming from the Preparatory Action 'Culture in EU External Relations' which pointed towards the need for a cultural relations strategy with clear goals and priorities, while concurrently taking local conditions and concerns of the partner countries into account.

The decision remains with the policy makers whether to focus on the perceived strengths or on weaknesses of the EU as identified in this study as well as to pick out the target groups and audiences to work with. A core target group should be the youth with a special focus on potential future decision-makers. The recommendations below constitute a condensed list of recommendations presented in Chapter 6.2 of the Final Report.

3.1 Overall Public Diplomacy Strategy and its implementation

- ✓ Establish a centralised Public Diplomacy (PD) strategy with a decentralised implementation to adjust to local specificities; identify a finite set of core messages in cooperation with EU Delegations, encompassing common areas of interest, key topics, and key target groups that the EU Delegations can work with.
- ✓ Strive for a better coordination with the Member States: strengthen coordination with EU Member States by aiming for joint strategic approaches as well as regular and institutionalised coordination meetings within the respective SP countries.
- ✓ Engage in Cultural Diplomacy drawing on the very positive perceptions across the SP countries of European/ EU Member States' culture, arts and history. Support initiatives of cooperation, look out for new and innovative approaches, engage better with the youth culture and empower local cultural actors.

- ✓ Take advantage of the local knowledge accumulated by the EU Delegations: encourage the Delegations to determine their target groups' views and needs through regular analysis of their opinions and perceptions, identify national foci in close cooperation with the Delegations (who in their turn would work in close contact with local experts) for tailor-made communication.
- ✓ Formulate and target the PD messages while being aware of differing interpretations of history. Remove any Eurocentric notion of European superiority from dialogues with any actors in Strategic Partner countries, particularly in countries that have experienced European colonialism.
- ✓ Combine all funds related to PD/ visibility measures into a multi-annual, lump sum budget that the EU Delegation can assign to a comprehensive implementation strategy for its PD activities tailored to local conditions.
- ✓ Slim down bureaucratic and hierarchical hurdles to reduce use of human resources for administrative processes; streamline processes and decentralise competencies in order to focus resources on the PD activity itself, thereby contributing to a more effective PD.
- ✓ Initiate and engage with expert networks: establish platforms for interested experts to interconnect, exchange ideas and share information on selected policy fields that are relevant to EU PD; involve local experts into PD design, 'listening' exercises (e.g. perceptions and images surveys). Consult them on how to anchor centrally-formulated messages and strategies to local discourses.
- ✓ Engage local civil society and the youth for wider outreach and local resonance: engage in discussion, support networking, initiate or mediate exchanges of activists.
- ✓ Use e-diplomacy to make PD more effective and reach distant audiences: provide specialised training, recurring along technological progress cycles, to officials at EU Delegations in order to improve digital diplomacy and social media skills for a successful design and implementation of e-diplomacy actions.
- ✓ Ensure flexibility and decentralised decision-making in the case of unexpected events through sufficient local resource allocation and decentralised decision-making.
- ✓ Make evaluation an integral part of the outreach activities: create a web-based regularly updated data-pool of on-going PD initiatives, design centrally specific and consistent evaluation tools – such as this study's baseline indicators – in order to provide the Delegations with synchronized measurement tools for the success of their outreach activities.

3.2 Media and social media recommendations

Below we present only the gist of the media and social media recommendations. For the elaborate version consult Chapters 6.2.4 and 6.2.5 of the Final Report.

- ✓ Devise location-specific media outreach programmes
- ✓ Organise the exchange of experience on engaging with media among EU Delegations

- ✓ Use high profile visits combined with a high profile outreach programme towards media to communicate how the EU is dealing with crises
- ✓ Focus on 3-5 most influential news sources with deep respect to the 'local'
- ✓ Identify and approach the local news authors who specialise on the EU and Europe news
- ✓ Engage in exchange diplomacy
- ✓ Increase the EU's visibility with messages with a local hook
- ✓ Draw on the concept of Europe to promote EU's messages
- ✓ Work with the major international news agencies, consider the viability of establishing a multilingual 'EU-news agency'
- ✓ Conduct regular media monitoring and analysis
- ✓ Ensure active, relevant and extensive presence on Twitter
- ✓ Provide easy access to information
- ✓ Engage in an active dialogue with citizens (EU and non-EU)
- ✓ Ensure systematic monitoring and analysis of social media data

3.3 Summary overview of country-level recommendations

The overarching (as presented above) as well as country-level recommendations should be considered together as the former may inform the latter. Some of the ideas and actions suggested below have been identified in previous studies, but are still very much relevant; they draw on evidence we identified in our research and can be seen as a re-affirmation of previous work. In order to develop customised communication strategies and their implementation, the country-based outputs (media and public opinion, informed by interviews and CE's expertise) of this study serve as a pool of rich and in-depth information. They are uploaded on the e-directory for further use. The recommendations offer a set of possibilities and suggestions to feed into the EU's Public Diplomacy where suitable. It is complemented by Chapter 4 of the Final Report, which presents suggestions concerning target groups, audiences and (potential) partner organisations. Below we only present the essential clusters of recommendations. For country-specific contexts and actions please see Chapter 6.2.6 of the Final Report.

- ✓ Engage in a stratified dialogue with different audiences, in local languages: engage with the youth and other target audiences, undertake a pro-active approach towards newsmakers and use diverse channels, including e-diplomacy and radio.
- ✓ Centre Public Diplomacy messages on resonating topics and normative visions: capitalise on the positive perception to produce messages that are tailored to the local context, enhance visibility of research, science, technology, energy, education, innovation, international development, long-term projects.
- ✓ Engage in open discussion concerning norms and values, offer first hand views from Europe, and reach out to different groups in the society to improve awareness and

understanding of the EU, engage in mutual learning with other societies on migration and multiculturalism.

- ✓ Listen to, consult with various groups: address perception of the EU having a hearing problem, consult with a variety local actors/ regarding EU-funded projects, make the EU more relevant at the local level.
- ✓ Encourage the development of personal links with Europe and the EU: engage in education, research, professional and cultural exchanges, engage with European diasporas, support networking among those returning from Europe.
- ✓ Strive for better coordination of PD efforts with the Member States, look for synergies, co-operate with European foundations and NGOs.