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Update of the 2015 Perception Study Executive summary and Volume I

2021

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Analysis of key audiences and target groups

Analysis by key research criteria
Aggregated recommendations

Socio-demographic indicators
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Update of the 2015 Perception Study

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UPDATE OF THE 2015 PERCEPTION STUDY

Executive summary

15 November 2021

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Introduction

1.1. Scope and methodology of the study

The Update Study is an **in-depth, multi-method analysis of the perceptions of the EU and Europe in 13 of the EU's key partners** – 10 Strategic Partner countries that were included in the 2015 Baseline Study:¹ Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, Republic of Korea and the US – as well as three additional countries: Colombia, Indonesia and Nigeria. The Update Study 2021 aims to contribute to EU public diplomacy in a number of ways: 1) it undertakes a systematic listening exercise; 2) it analyses the reception of the EU's messages and thematic projections factoring local conditions and evolving realities; and 3) it develops recommendations to fine-tune meaningful and effective dialogue and engagement with and by the EU globally. The Update Study is *not* an evaluation of EU public diplomacy actions.

To track the evolution of perceptions of the EU over time, the Update Study 2021 follows the analytical framework of the 2015 Baseline Study in terms of research criteria, target groups and main themes as well as explanatory variables regarding EU perceptions. The study addresses the **research criteria** of visibility (including awareness), actorness, effectiveness, local cognitive resonance and perceptions of the EU/ Europe as a norm-setter. The **key themes and sub-themes** include: economy and trade; politics; normative aspects; climate and the environment; energy; research, science and technology; development and assistance; social; culture; and health. The key **target groups/audiences** in the Update Study include policy makers, government officials, the media, opinion leaders, the business community, NGOs and civil society organisations, youth and the general public. Lastly, the team considered **various explanatory factors**, ranging from global (the geopolitical context, economic and trade relations), to country-level (political, cultural and historical contexts) and individual-level variables (age, gender, education and exposure, and personal experience with Europe).

The research design consists of eight building blocks: 1) a literature review of research into external perceptions of the EU between 2015 and 2021; 2) a mapping of EU public diplomacy initiatives in the 13 countries between 2015 and 2021;² 3) public opinion polls in 13 countries, carried out between 28 April and 16 May 2021;³ 4) a media analysis of six selected newspapers in each country between 1 February and 30 April 2021;⁴ 5) a general quantitative analysis of social media between 1 February and 30 April 2021, and an analysis of three EU-related events in May and June, observing responses to the same annual events as in 2015;⁵ 6) non-representative focus groups with university students, held between 22 March and 10 May 2021;⁶ 7) interviews with policy makers and opinion leaders, conducted between 20 April and 16 July 2021; and 8) an elaboration of policy recommendations. All these elements include comparative analysis of the perceptions of the EU between countries and over time.

¹ More information on the study 'Analysis of the perception of the EU and EU's policies abroad', is available here: https://ec.europa.eu/fpi/analysis-perception-eu-and-eus-policies-abroad_en.

² A detailed Literature review, including the analysis of public diplomacy initiatives, is available in Annex I of this study.

³ A detailed Comparative public opinion survey report is available in Annex II of this study.

⁴ A detailed Comparative traditional media analysis report is available in Annex III of this study.

⁵ A detailed Comparative social media report is available in Annex IV of this study.

⁶ A detailed Comparative focus group report is available in Annex V of this study.

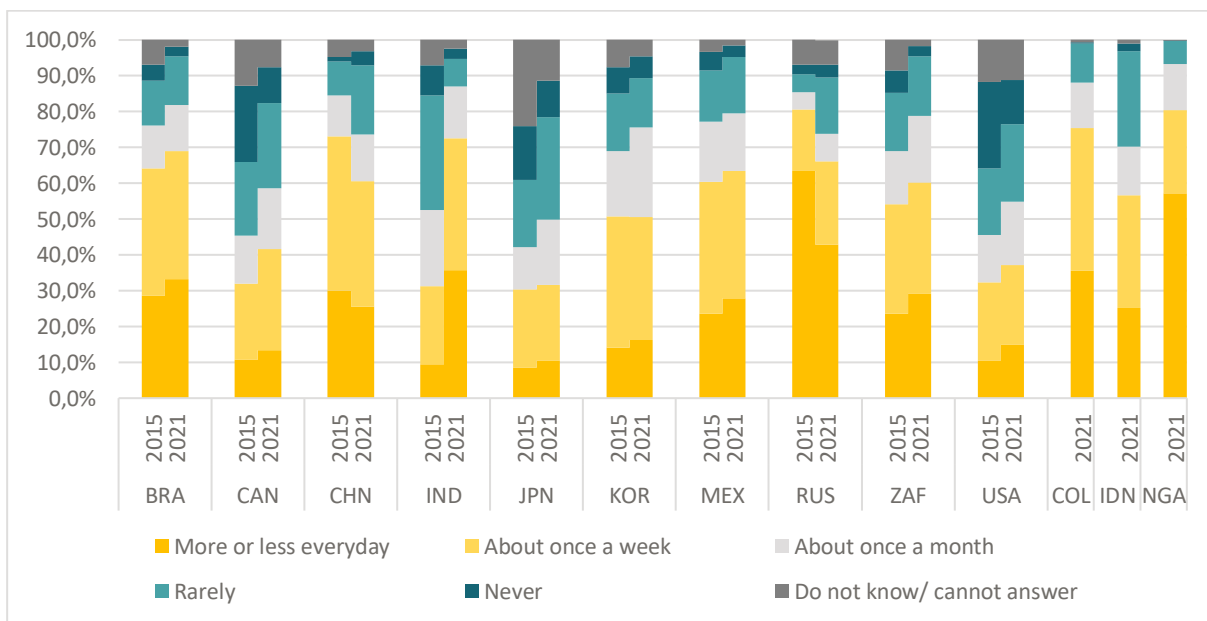
The combination of methods listed above allowed to map perceptions of the EU in the 13 countries in a comprehensive manner and identify trends in the evolution of the perceptions. A range of methods also provided explanations as to the dynamics and factors that shape such perceptions.

Main findings on the key research criteria

2.1. Visibility: the volume of EU appearances in press and social media

To assess visibility, we measure the frequency with which the general public across the 13 countries report having access to information about the EU (**more information on the results of the public opinion survey can be found in Annex II: Comparative opinion survey report**). In most of the countries (10 out of 13), more than half of the public opinion survey respondents report hearing or reading about the EU at least once a week. Meanwhile, the general public surveyed in Canada, Japan and the US report hearing or reading about the EU less frequently. These results of the 2021 Update Study are broadly in line with the findings of the 2015 Baseline Study. In Canada, Japan and the US, however, the results have somewhat improved since 2015 – while in 2021, members of the general public surveyed in China and Russia claim they hear about the EU slightly less frequently than in 2015 (Figure 1).

FIGURE 1. FREQUENCY WITH WHICH RESPONDENTS HEAR OR READ ABOUT THE EU



Source: Based on answers to survey question Q28: ‘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...’

Note: Please note that in the 2015 Baseline Study, the public opinion survey in India was carried out face-to-face. In 2021, an online panel survey was carried out in India. For this reason, the authors of this report treat with caution any direct comparison between the 2015 baseline data with the data obtained from the 2021 survey.

In 2021, television is reported to be the most popular channel via which respondents receive news about the EU across most countries, as in 2015. This is followed by online media, print media and social media. Table 1 illustrates this relative consistency in terms of the main information sources about the EU over time.

TABLE 1. MAIN SOURCES OF INFORMATION ABOUT THE EU

	YEAR	ONLINE MEDIA	PRINT	TV	RADIO	SOCIAL MEDIA	SCHOOL	GOV	PERSONAL CONTACTS	EUD	OTHER	DNK
BRA	2015	54.8%	38.0%	70.7%	18.5%	40.5%	19.4%	13.6%	7.0%	3.5%	3.0%	1.4%
	2021	75.6%	30.4%	65.1%	11.8%	43.8%	14.4%	15.5%	8.6%	2.2%	2.9%	0.6%
CAN	2015	50.2%	31.2%	59.6%	25.8%	28.0%	10.9%	8.8%	8.2%	2.3%	4.0%	1.8%
	2021	55.0%	17.4%	55.3%	17.4%	27.2%	11.0%	10.5%	10.5%	2.9%	2.4%	1.8%
CHN	2015	71.1%	35.9%	67.1%	23.4%	48.4%	16.4%	22.1%	11.1%	6.0%	5.1%	0.9%
	2021	70.4%	24.4%	64.3%	15.6%	36.1%	11.8%	13.4%	5.9%	4.6%	5.6%	1.9%
IND	2015	29.1%	53.8%	81.7%	15.8%	24.6%	21.7%	11.3%	7.0%	4.4%	3.3%	3.5%
	2021	81.1%	53.1%	66.7%	18.7%	57.0%	29.4%	23.4%	19.7%	17.8%	4.0%	0.7%
JPN	2015	35.1%	29.3%	72.4%	10.4%	14.4%	5.3%	7.4%	4.2%	1.8%	4.0%	5.3%
	2021	37.8%	23.4%	64.1%	7.0%	14.3%	6.2%	5.7%	4.3%	2.1%	2.5%	7.7%
KOR	2015	54.7%	28.0%	69.5%	9.7%	21.0%	6.2%	7.7%	3.8%	2.7%	2.8%	2.3%
	2021	53.6%	21.4%	66.1%	11.4%	19.3%	8.1%	7.5%	5.1%	3.3%	2.2%	2.2%
RUS	2015	54.5%	27.8%	81.7%	28.6%	33.2%	5.1%	8.6%	8.4%	1.8%	2.9%	1.4%
	2021	60.7%	15.0%	74.9%	19.0%	30.4%	3.9%	16.9%	6.1%	3.3%	1.4%	1.2%
MEX	2015	49.7%	38.8%	61.8%	24.1%	54.9%	19.2%	13.9%	10.4%	3.3%	3.3%	1.2%
	2021	63.4%	30.6%	55.9%	12.4%	53.5%	13.2%	12.2%	6.1%	4.3%	4.0%	0.7%
ZAF	2015	60.1%	39.8%	67.6%	39.3%	40.7%	14.0%	11.8%	10.5%	3.2%	3.4%	1.6%
	2021	76.8%	24.6%	65.5%	26.9%	48.1%	15.0%	22.2%	13.0%	7.2%	2.5%	0.8%
USA	2015	38.0%	26.6%	54.6%	18.8%	18.8%	10.7%	12.3%	10.0%	7.2%	2.0%	5.0%
	2021	46.4%	20.6%	47.2%	16.2%	26.5%	9.4%	10.7%	8.3%	3.2%	2.4%	4.4%
COUNTRIES ADDED IN 2021												
COL	2021	66.7%	32.4%	70.0%	23.9%	56.2%	20.0%	18.9%	13.5%	5.6%	5.6%	0.4%
IDN	2021	84.5%	25.5%	56.1%	8.4%	52.6%	16.7%	13.5%	6.1%	6.5%	3.7%	0.3%
NGA	2021	12.2%	36.5%	66.9%	27.6%	62.8%	28.1%	20.3%	15.3%	12.6%	4.7%	0.0%

Source: Based on answers to survey question Q29: '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?'

The public opinion survey in 2021 included two new answer options for the question concerning sources of information about the EU and Europe. The new additions are: movies, art and literature; and entertainment streaming platforms (Netflix, YouTube and the like). These proved to be significant sources of information about the EU in most countries (Table 2).

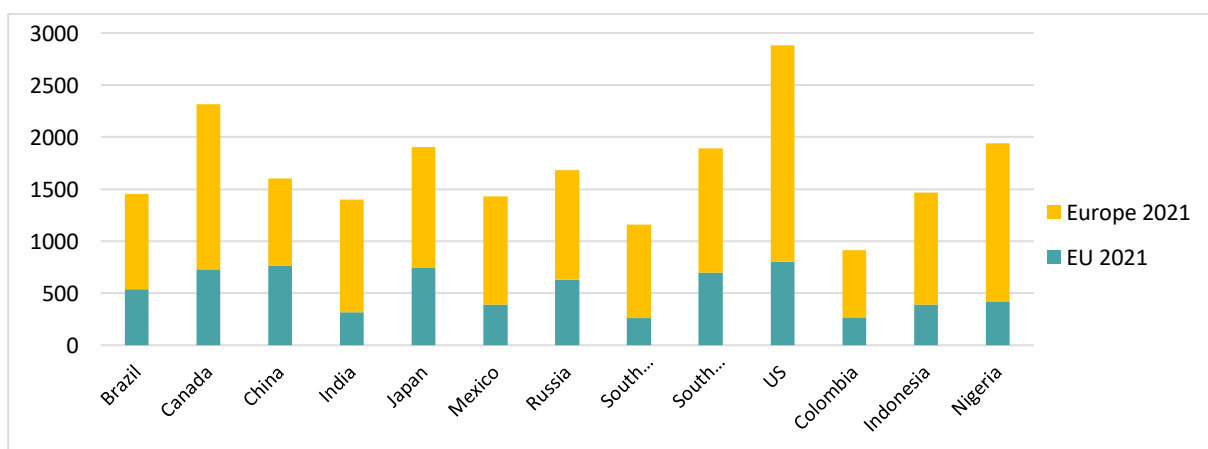
TABLE 2. NEW OPTIONS, COMPARED WITH THE THREE EXISTING SOURCES OF EU NEWS IN 2021

	Online media	TV	Social media	Streaming platforms	Print media	Movies, art, literature
BRA	75.60%	65.10%	43.80%	42.70%	30.40%	14.30%
CAN	55.00%	55.30%	27.20%	24.10%	17.40%	13.90%
CHN	70.40%	64.30%	36.10%	26.30%	24.40%	21.30%
COL	66.70%	70.00%	56.20%	47.40%	32.40%	30.10%
IDN	84.50%	56.10%	52.60%	43.50%	25.50%	26.80%
IND	81.10%	66.70%	57.00%	53.00%	53.10%	25.20%
JPN	37.80%	64.10%	14.30%	13.00%	23.40%	11.10%
KOR	53.60%	66.10%	19.30%	20.10%	21.40%	13.70%
MEX	63.40%	55.90%	53.50%	49.60%	30.60%	26.50%
NGA	87.80%	66.90%	62.80%	39.30%	36.50%	22.70%
RUS	60.70%	74.90%	30.40%	23.40%	15.00%	17.50%
USA	46.40%	47.20%	26.50%	24.70%	20.60%	14.90%
ZAF	76.80%	65.50%	48.10%	36.60%	24.60%	19.50%

Source: Based on the answers to survey question Q29: ‘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?’

Traditional media analysis of the leading agenda-setting newspapers reveals a sharp increase in the monthly volume of articles covering Europe in 2021, in comparison to 2015. While coverage of the EU has increased, it has not done so to the same extent as coverage of Europe. A similar trend – albeit to a lesser extent – was seen in the 2015 Baseline Study. In addition, the media continue to report Europe as a centre of cultural attraction, noticeably more than the EU (Figure 2).

FIGURE 2. VOLUME OF EU VS. EUROPE NEWS COVERAGE IN THREE LEADING NEWSPAPERS IN 2021



Source: Sourced from the Factiva repository (2021), the same three newspapers are observed in 2015 and 2021

Qualitative and quantitative analyses of newspapers demonstrate that health, the economy and politics are the three themes most widely covered in EU-related news articles in all 13 countries (**more information on traditional media analysis can be found in Annex III: Comparative traditional media analysis of the report**). News coverage in Republic of Korea, Japan, Russia and China demonstrates a considerable interest in cultural topics in the EU, such as sports and the arts. EU press coverage in Russia stands out due to a significant share of news stories within the thematic frame of energy (10%), compared with other countries. China is the only country in which the share of themes is fairly balanced across all observed media outlets. The most thematic fields in which the notion of ‘Europe’ is referenced most frequent across all countries are health, culture and economy (Table 3).

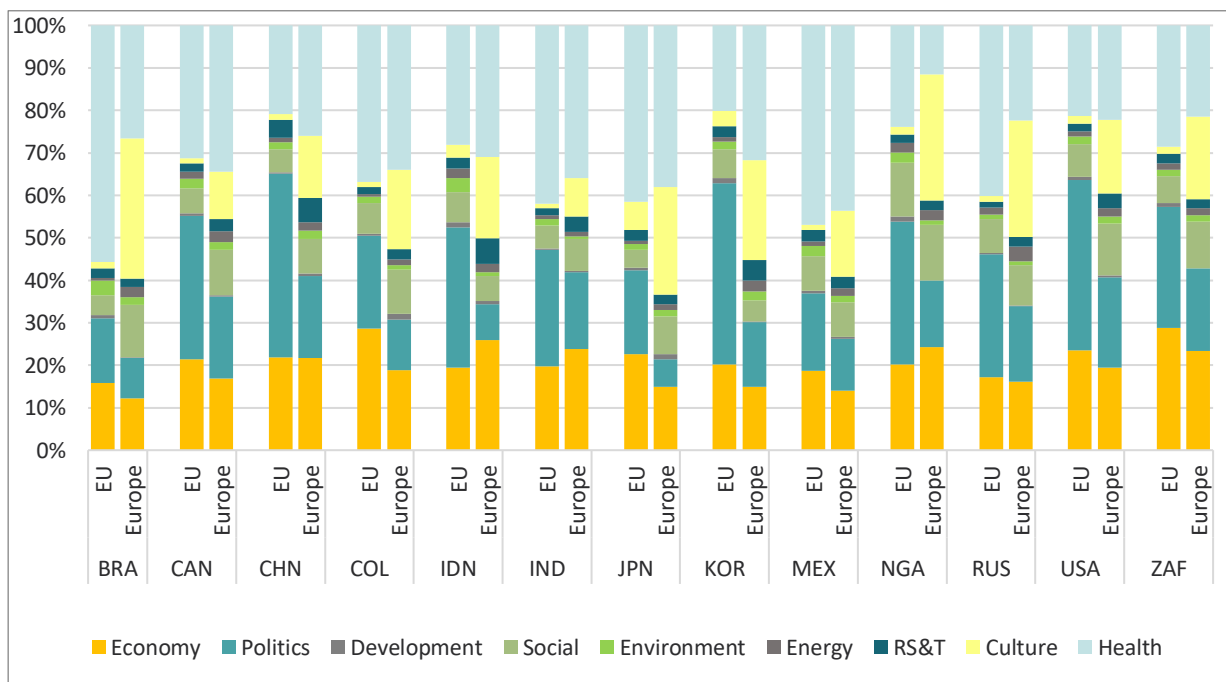
TABLE 3. MOST VISIBLE THEMES IN PRESS ARTICLES COVERING THE EU AND EUROPE

Rank	EU						EUROPE					
	2015			2021			2015			2021		
	1	2	3	1	2	3	1	2	3	1	2	3
Brazil	ECO	POL	S&C	POL	HLTH	ECO	ECO	S&C	POL	S&C	HLTH	ECO
Canada	ECO	POL	S&C	ECO	HLTH	POL	ECO	S&C	POL	HLTH	ECO	S&C
China	ECO	POL	S&C	ECO	POL	HLTH	ECO	S&C	POL	ECO	POL	ENR
Colombia	N/A	N/A	N/A	HLTH	POL	ECO	N/A	N/A	N/A	HLTH	S&C	POL
India	ECO	POL	S&C	POL	ECO	HLTH	ECO	S&C	POL	ECO	HLTH	POL
Indonesia	N/A	N/A	N/A	ECO	POL	HLTH	N/A	N/A	N/A	ECO	S&C	HLTH
Japan	POL	ECO	NOR	S&C	POL	HLTH	ECO	S&C	POL	S&C	HLTH	ECO
Mexico	POL	ECO	S&C	POL	ECO	HLTH	ECO	S&C	POL	ECO	HLTH	POL
Nigeria	N/A	N/A	N/A	POL	ECO	HLTH	N/A	N/A	N/A	S&C	ECO	POL
Russia	ECO	POL	ENR	ECO	POL	HLTH	S&C	ECO	POL	S&C	ECO	HLTH
South Africa	ECO	POL	S&C	ECO	HLTH	POL	ECO	S&C	POL	ECO	S&C	HLTH
Republic of Korea	ECO	POL	S&C	S&C	POL	ECO	ECO	S&C	POL	S&C	ECO	HLTH
USA	POL	ECO	S&C	POL	HLTH	ECO	POL	ECO	S&C	ECO	S&C	HLTH
Legend		POL	Politics			ECO	Economy			ENR	Energy	
		S&C	Society & culture			NOR	Normative			HLTH	Health	

Source: Based on samples collected for the qualitative media analysis. Each article can be coded for more than one theme.

When assessing actorness in the coverage of the EU and Europe on social media, the most frequent thematic fields in which the EU is referenced, across all countries, are health, politics and economy. As in the traditional media analysis, the most widely referenced themes in the ‘Europe’ dataset are health, culture and economy (Figure 3).

FIGURE 3. SHARE OF COVERAGE RELATING TO THE EU AND EUROPE IN SOCIAL MEDIA IN 2021, BY THEME



Source: Sourced from Mediatoolkit (2021).

Note: Data on shares of themes are not comparable with 2015 as this a novel element of analysis in 2021. The quantitative part of the social media analysis is comparable with the quantitative analysis of traditional media in 2021.

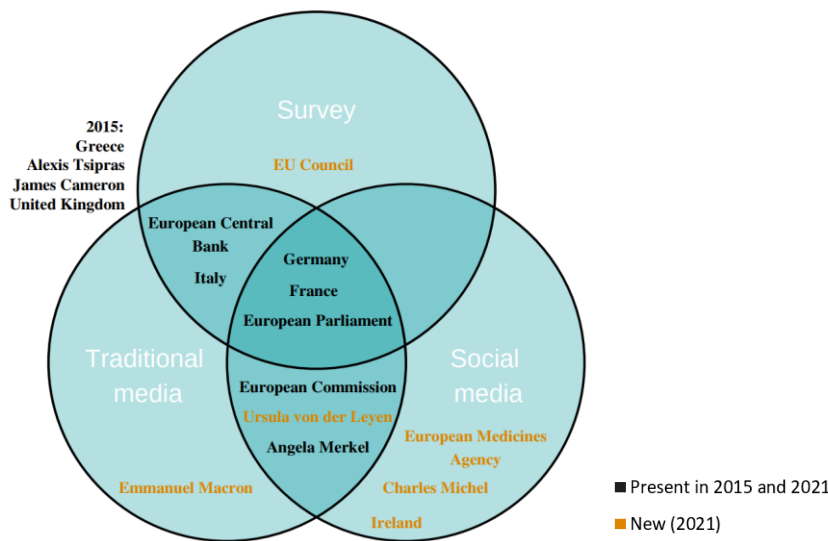
As illustrated by Figure 4 below, the most **visible countries** in both the EU and Europe datasets of the traditional media analysis across 13 locations are Germany, France, Italy, Spain and the Netherlands. Social media analysis shows a somewhat different order of the most visible EU Member States: Germany, France, Ireland, Italy, Spain and Hungary. In social media, Ireland is mentioned in the context of the EU, in reference to its extraordinary economic performance and special COVID-19 measures, as well as due to rising tensions and protests regarding border checks between neighbouring Northern Ireland and the UK. Hungary is often mentioned in relation to its disagreements with the EU over vaccination strategy and media freedom.

In the traditional media analysis, the **most visible EU leaders** were the President of the European Commission, Ursula von der Leyen, followed by the EU High Representative (HR) Josep Borrell, and President of the European Council, Charles Michel, as well as the President of the European Central Bank Christine Lagarde. This marks a change from the 2015 Baseline Study, in which the most visible leaders were the Europeans Commission’s Jan Claude Juncker, followed by the President of the European Parliament, Donald Tusk, the President of Eurogroup, Jeroen Dijsselbloem, and only after these, the then-HR Frederica Mogherini. In 2021, EU officials are referenced frequently in the context of the EU’s handling the COVID-19 pandemic as well as EU external relations, particularly sanctions against Russia and China.

In both the EU and Europe datasets, the most visible **leaders of EU Member State** are Angela Merkel, Emmanuel Macron and Mario Draghi. Viktor Orbán, Sebastian Kurz, Pedro Sánchez, Andrej Babiš, Mark Rutte and Mette Frederiksen are mentioned too, but to a much lesser extent. Similarly, on social media, the most frequently referenced leaders of Member States in the EU dataset are Angela Merkel, Emmanuel Macron, Mario Draghi, Viktor Orbán and Micheál Martin. In the Europe dataset, Angela Merkel, Emmanuel Macron, Viktor Orbán and Mario Draghi are the most frequently mentioned leaders, followed by Mette Frederiksen and Pedro Sánchez.

The **most visible EU institutions** are the European Commission, the European Parliament and the European Central Bank. In light of the COVID-19 pandemic, the European Medical Agency has also gained major visibility (Figure 4).

FIGURE 4. MOST RECOGNISABLE EU COUNTRIES, INSTITUTIONS AND LEADERS



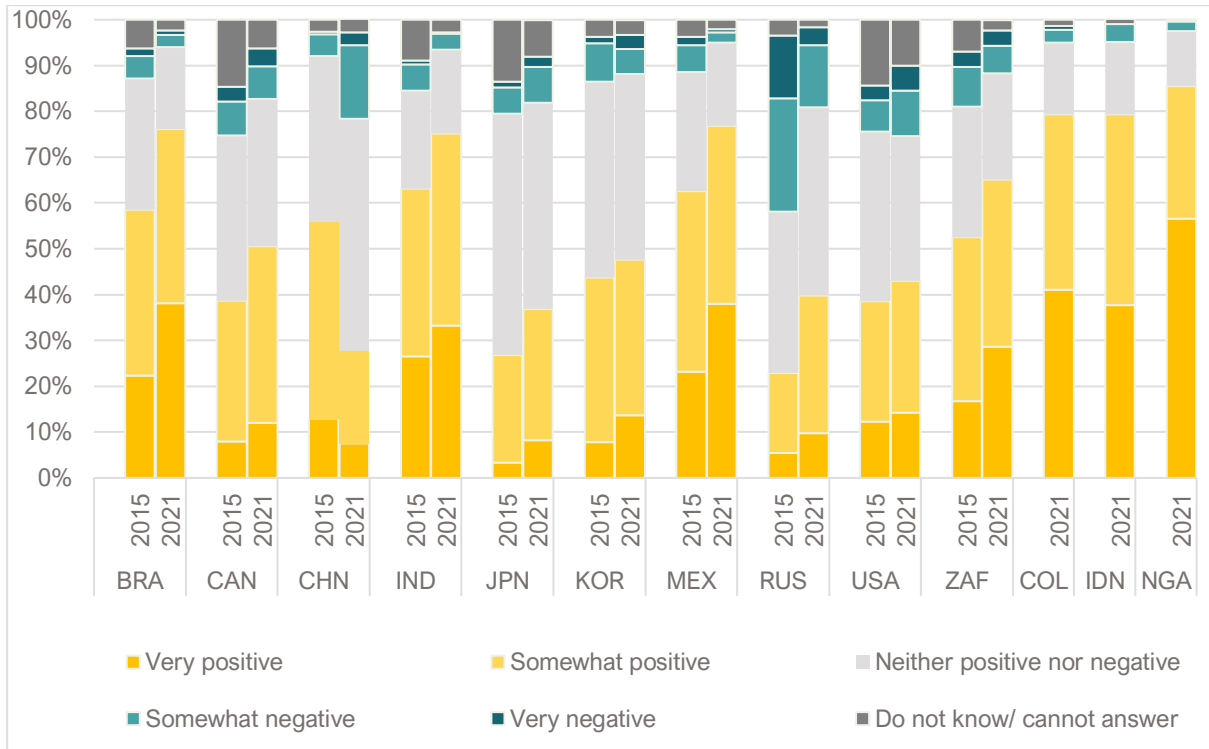
Source: Based on social media, traditional media and survey findings. Survey findings on countries are based on the attractiveness of the countries (Q26) rather than general visibility. The most visible people (EU officials/Member States leaders) are not available in the survey. In the top left area, are the institutions and people from the 2015 report that are no longer leading in visibility in the 2021 Study.

2.2. Actorness: EU performance in different domains

The criterion of actorness focuses on whether or not the EU is perceived as being an active, important and influential actor. The survey findings reveal that the general view towards the EU is positive across all countries, with most respondents being able to formulate an attitude and say whether they feel positively, negatively or neutral about the bloc. The lowest share of respondents who could not formulate an attitude towards the EU (‘cannot answer/do not know’) is in the US – 10% of respondents. However, it must be noted that the number of people able to formulate an attitude towards the EU in this country has increased compared to 2015. This was the case in all of the countries included in the 2015 Study, with the exception of China and Republic of Korea. In these two countries, the indicators regarding attitude formulation have remained stable overall.

There has been an increase in the positive attitudes ('very positive' and 'somewhat positive') over the last five years in all locations except China, where there has been an increase in negative attitudes and a decrease in positive attitudes (Figure 5).

FIGURE 5. GENERAL ATTITUDES TOWARDS THE EU IN THE PARTNER COUNTRIES, 2015 AND 2021

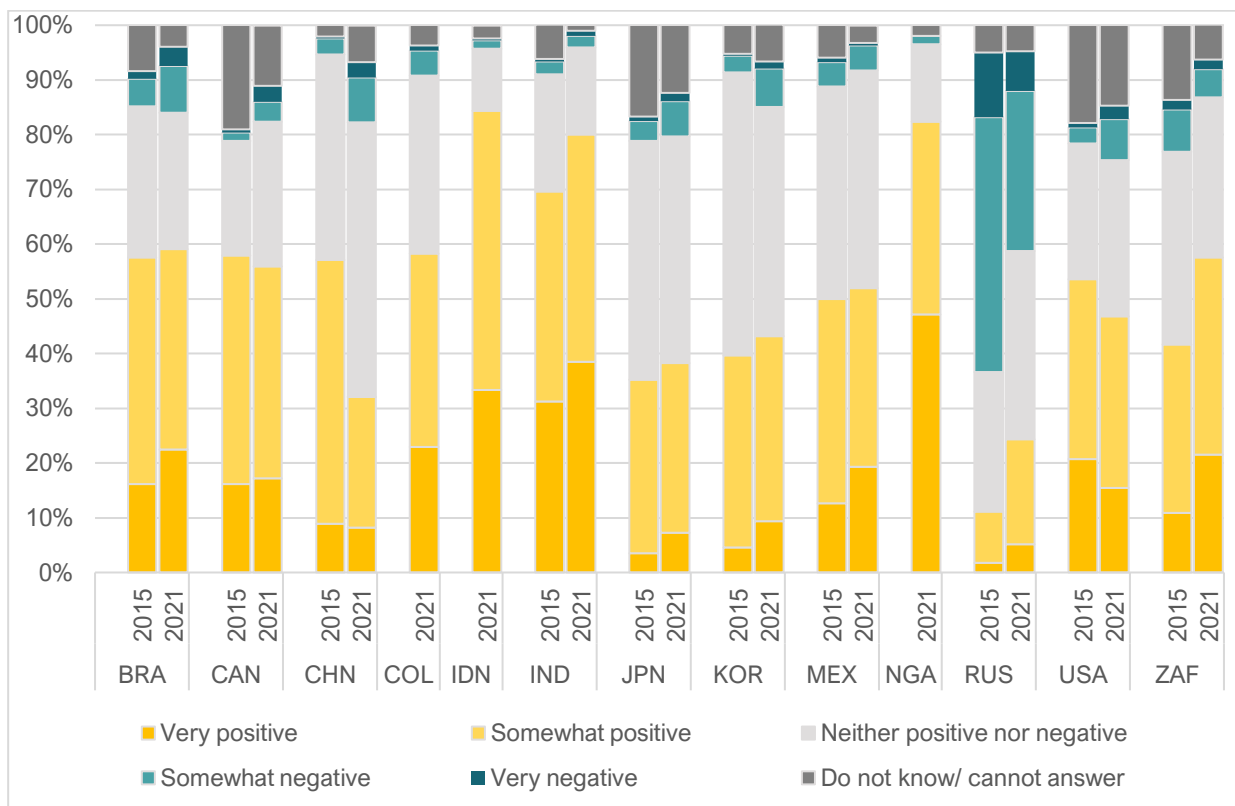


Source: Based on the answers to Q1: ‘Generally speaking, please indicate how positive or negative you feel about each of the following countries and organisations?’

Respondents were also asked to evaluate their country’s relationship with the EU (figure 6). This relationship was perceived very positively in India, Nigeria and Indonesia, while in other countries a large proportion of respondents express neutral opinions.

Over time, the degree to which perceptions of bilateral relations with the EU have deteriorated has been greatest in the US and China. The general public in Canada also expressed fewer positive perceptions regarding EU-Canada relations, but also fewer negative ones. A more pronounced change towards positive perception can be observed in India, South Africa and Russia. Not only have positive perceptions increased in these countries, but negative perceptions have also decreased. A less pronounced positive change is observed in Brazil, Japan, Republic of Korea and Mexico.

FIGURE 6. EVALUATIONS OF THE RELATIONSHIP BETWEEN THE PARTNER COUNTRIES AND THE EU IN 2015 AND 2021

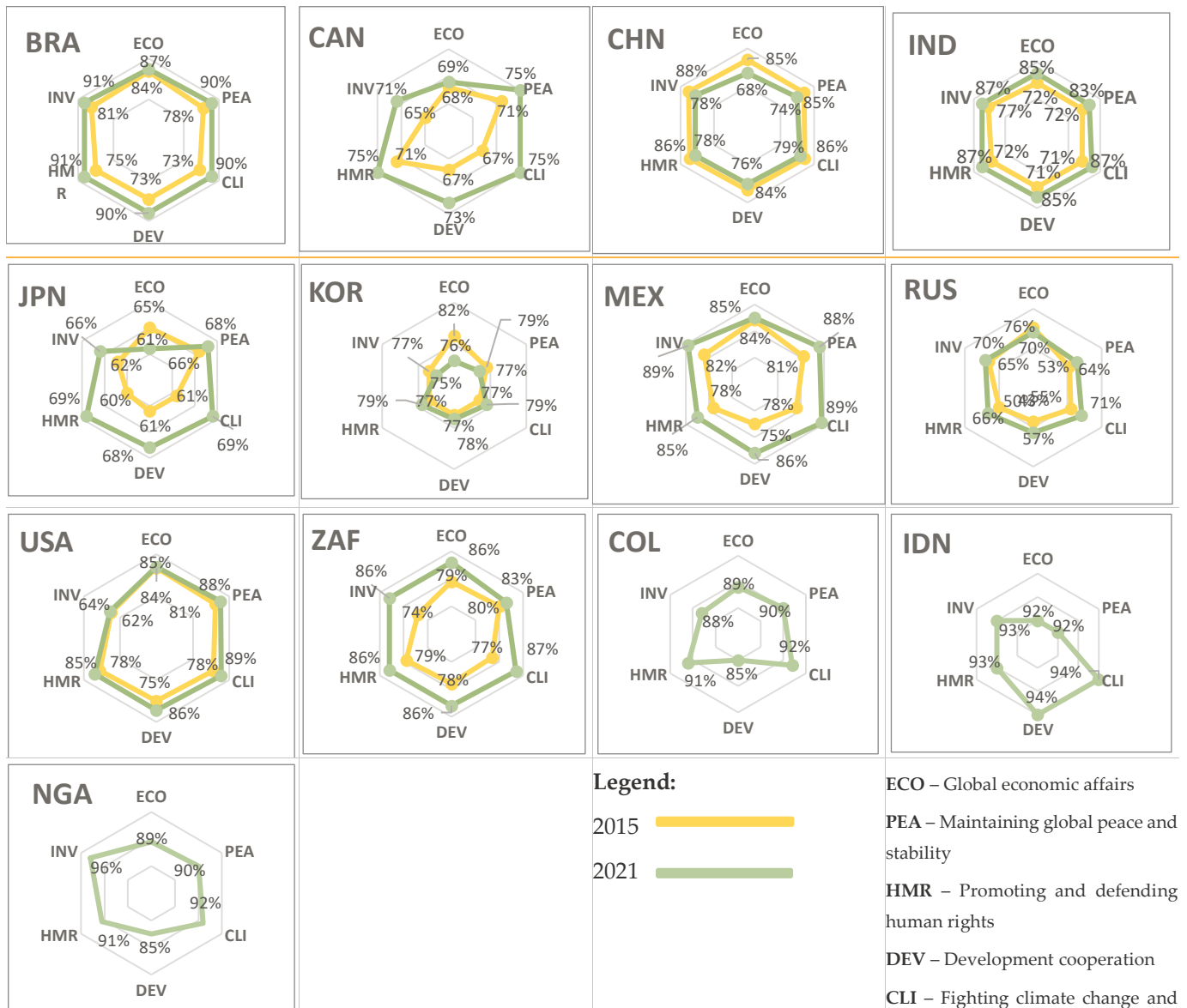


Source: Based on answers to survey question Q3: ‘Generally speaking, which of the following words best describes your country’s overall relationship with the EU?’

Figure 7 below presents the results of the public opinion surveys carried out in the countries covered by the 2015 Baseline Study and the 2021 Update Study (10 and 13 countries, respectively) with regard to the perceived importance of the EU in six issue areas. These were: global economic affairs; maintaining global peace and stability; promoting and defending human rights; development cooperation; fighting climate change and protecting the environment; and advancing global innovation and technological progress. The percentages represent the shares of respondents in each country who think that the EU is ‘very important’ or ‘somewhat important’ in the given area.

The perceived importance of the EU in all issue areas surveyed has fallen among the general public in China. In Republic of Korea, Japan and Russia, perceptions of the EU as an economic actor have diminished somewhat over time. In all other countries and issue areas, the perceived importance of the EU has grown in comparison to 2015.

FIGURE 7. OPINIONS OF THE EU'S GLOBAL IMPORTANCE IN DIFFERENT AREAS

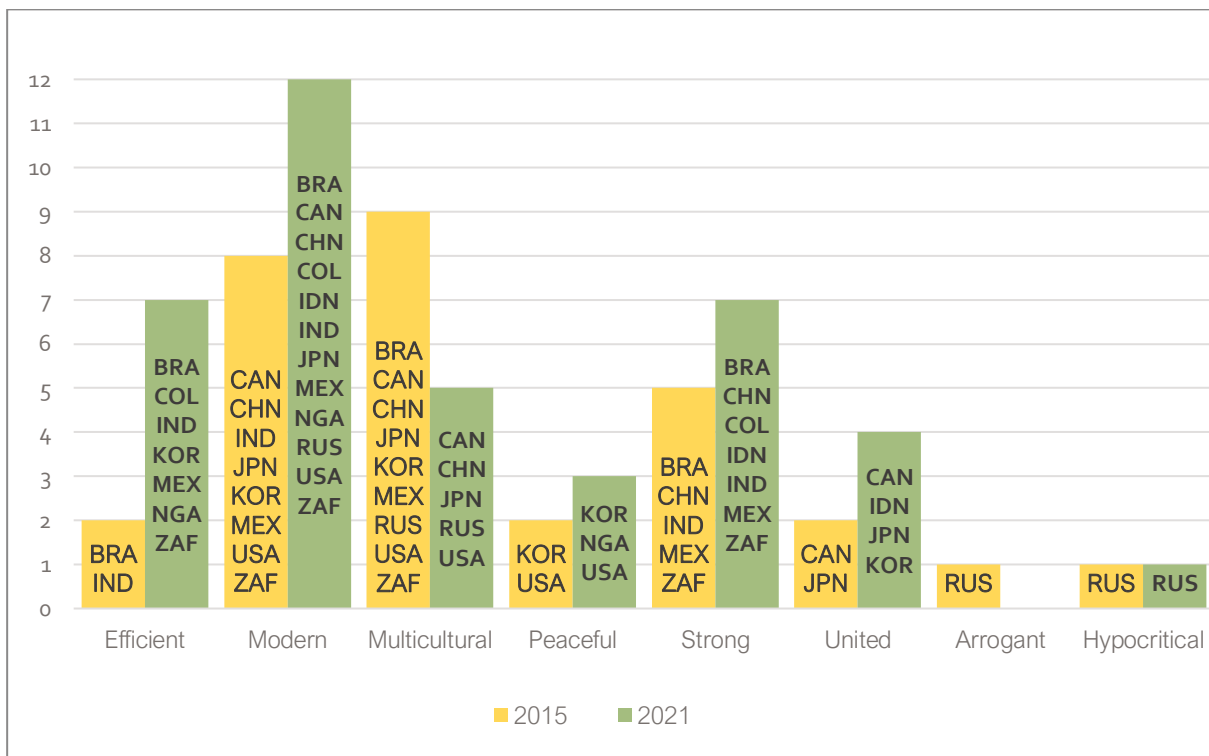


Source: Based on answers to survey questions Q 6-11 (2015) and Q 6-8, 10-12 (2021). Q6: ‘In your view, how influential in global economic affairs are the following countries and organisations: [the EU]’; Q7: ‘In your view, how important a role do each of the following countries or organisations play 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 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]’.

Survey respondents were also asked to choose the words they felt best described the EU. The term most often associated with the EU is ‘modern’. This term came first in all but two of the countries surveyed (Japan and Republic of Korea). Respondents associate this term more strongly with other countries, particularly Japan and the US. The terms ‘strong’ and ‘efficient’ are also frequently associated with the EU. ‘Strong’ came second or third in seven of the surveyed countries; ‘efficient’ came second or third in seven countries; however, as in the case of ‘modern’, these two terms are also more strongly associated with other countries. ‘United’ and ‘multicultural’ are also often associated with the EU. Notably, Republic of Korea is the only country in which respondents see the EU as the most efficient and trustworthy actor out of the list of eight international actors. Associations with negative terms such as ‘aggressive’, ‘hypocritical’ or ‘arrogant’ were low among respondents across all countries except Russia, where ‘hypocritical’ remains one of leading descriptors associated with the EU (Figure 8).

This nonetheless represents an improvement in perceptions since 2015, when the share of Russian respondents describing the EU as hypocritical was much higher. In contrast, the share of Chinese respondents associating the EU with the terms ‘hypocritical’ and ‘arrogant’ has increased since 2015 (Table 4).

FIGURE 8. MOST COMMON DESCRIPTORS ASSOCIATED WITH THE EU



Source: Based on Q2: ‘Which of the following words, if any, do you think best describe each of the following countries and organisations?’ The figure reflects the number of countries in which each term was chosen as one of the top three descriptors (out of a possible 10) by respondents in each country (10 countries in 2015 and 13 in 2021).

TABLE 4. MOST COMMON DESCRIPTORS ASSOCIATED WITH THE EU AND SELECTED COUNTRIES

	EU			USA		
	1	2	3	1	2	3
BRA	MODERN	STRONG	EFFICIENT	MODERN	STRONG	EFFICIENT
CAN	MODERN	UNITED	MULTICULTURAL	AGGRESSIVE	ARROGANT	MODERN
CHN	MODERN	MULTICULTURAL	STRONG	ARROGANT	MODERN	HYPOCRITICAL
COL	MODERN	EFFICIENT	STRONG	MODERN	STRONG	EFFICIENT
IDN	MODERN	STRONG	UNITED	MODERN	STRONG	AGGRESSIVE
IND	MODERN	EFFICIENT	STRONG	MODERN	STRONG	EFFICIENT
JPN	MULTICULTURAL	MODERN	UNITED	STRONG	MODERN	MULTICULTURAL
KOR	PEACEFUL	EFFICIENT	UNITED	STRONG	MODERN	MULTICULTURAL
MEX	MODERN	STRONG	EFFICIENT	MODERN	STRONG	EFFICIENT
NGA	MODERN	PEACEFUL	EFFICIENT	MODERN	STRONG	EFFICIENT
RUS	MODERN	MULTICULTURAL	HYPOCRITICAL	AGGRESSIVE	MODERN	ARROGANT
USA	MODERN	PEACEFUL	MULTICULTURAL	MODERN	STRONG	MULTICULTURAL
ZAF	MODERN	EFFICIENT	STRONG	MODERN	STRONG	ARROGANT
	CHINA			RUSSIA		
	1	2	3	1	2	3
BRA	MODERN	EFFICIENT	STRONG	STRONG	MODERN	AGGRESSIVE
CAN	AGGRESSIVE	ARROGANT	STRONG	AGGRESSIVE	STRONG	ARROGANT
CHN	PEACEFUL	UNITED	TRUSTWORTHY	STRONG	UNITED	MODERN
COL	MODERN	EFFICIENT	STRONG	STRONG	EFFICIENT	MODERN
IDN	MODERN	STRONG	AGGRESSIVE	STRONG	MODERN	UNITED
IND	AGGRESSIVE	ARROGANT	STRONG	STRONG	MODERN	EFFICIENT
JPN	AGGRESSIVE	ARROGANT	HYPOCRITICAL	AGGRESSIVE	ARROGANT	STRONG
KOR	ARROGANT	HYPOCRITICAL	AGGRESSIVE	AGGRESSIVE	STRONG	HYPOCRITICAL
MEX	MODERN	EFFICIENT	STRONG	STRONG	MODERN	EFFICIENT
NGA	MODERN	PEACEFUL	EFFICIENT	STRONG	MODERN	EFFICIENT
RUS	UNITED	STRONG	MODERN	MULTICULTURAL	STRONG	PEACEFUL
USA	AGGRESSIVE	ARROGANT	STRONG	AGGRESSIVE	ARROGANT	STRONG
ZAF	MODERN	STRONG	EFFICIENT	STRONG	AGGRESSIVE	MODERN

Source: Based on Q2: ‘Which of the following words, if any, do you think best describes each of the following countries and organisations (EU)? The table presents the three descriptors chosen most frequently by respondents in each county.

The findings of the traditional media analysis reveal several leading conceptual metaphors that are used to describe the EU. Given the media's focus on negative events during the monitoring period (the EU's handling of COVID-19 and vaccines, EU-China, EU-Russia relations, economic recession), negative metaphors were more prevalent. On the topic of health, EU was framed as falling short with regard to vaccination programmes/vaccine exports were seen as too bureaucratic and untrustworthy (India, South Africa, Republic of Korea, Brazil, Canada). The EU was also portrayed as a victim of the global pandemic in themes relating to the economy (China, the US). In politics, the EU is seen as a sometimes-fragile structure, usually in comparison to China and Russia (Japan, the US, China, Indonesia, Republic of Korea), and not always capable of dealing with rising foreign powers. In contrast, the policy makers and opinion leaders interviewed, often noted the EU's resilience (another metaphor) and offered a more optimistic outlook on the EU's ability to overcome the challenges presented by the pandemic in the issue areas of the economy and trade. Students across all locations formulated perceptions of the EU as a promising actor on climate and sustainability, which could motivate and lead other international actors – a vision that was accompanied by high expectations on the part of future leaders in the 13 countries.

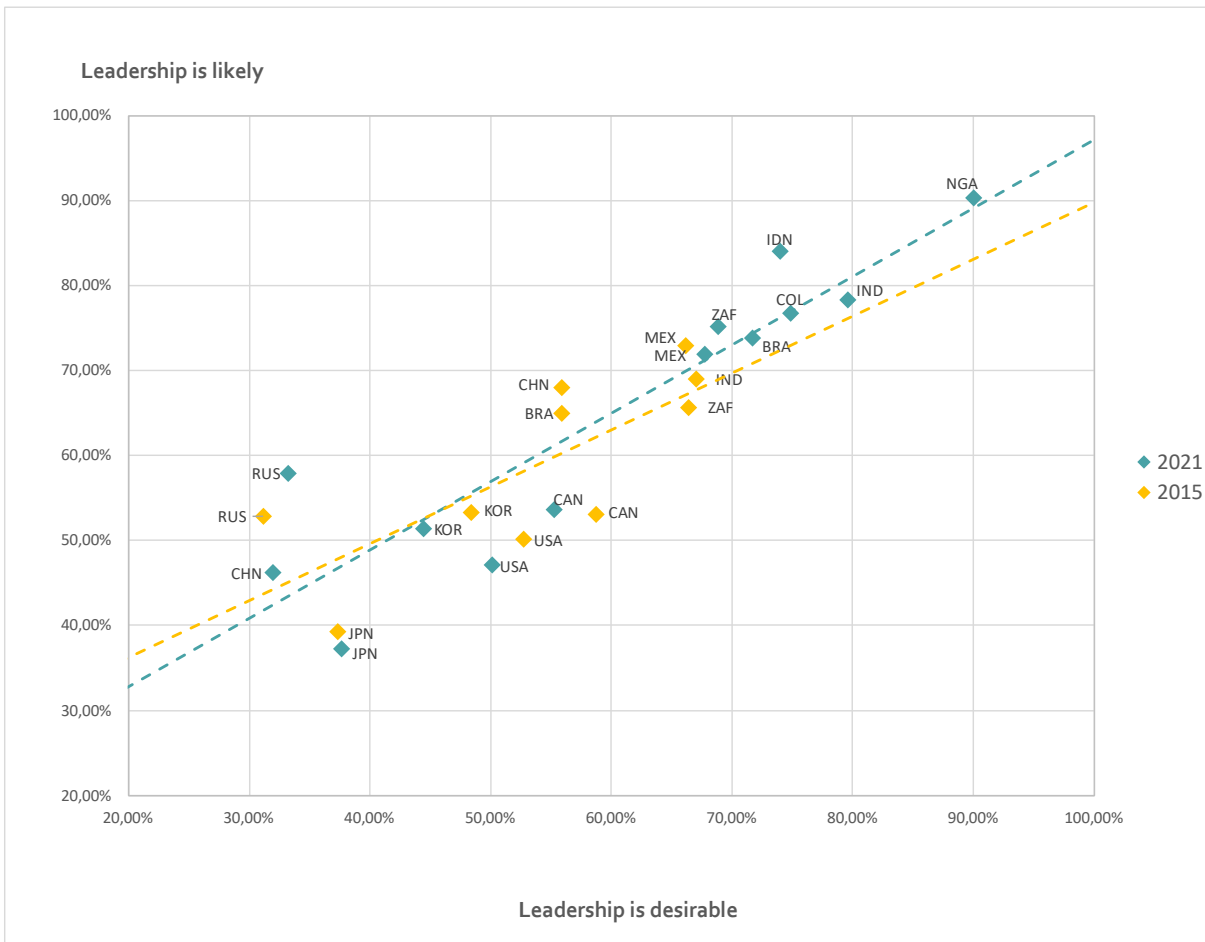
2.3. Effectiveness of EU actions

As a proxy for the EU's perceived 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 on such a role.

Overall, the general public surveyed across all 13 countries regarded the EU as benevolent but less potent compared with other global actors (Figure 9). In China, Russia and the US, the publics see their own respective countries as the most likely and desirable global leaders. This is based on high opinions of their own countries' capabilities and relatively low opinions of the EU as an international actor/leader. Among most of the countries in the study, the US is regarded as the most likely and most desirable global leader, followed by the EU and Japan (in Canada and Colombia, the EU's global leadership is seen as the most desirable, but the US still leads on likelihood). The exception is in public perceptions in Indonesia, where Japan is seen as the most desirable and most likely global leader (followed by the EU and the US).

Perceptions regarding the desirability and likelihood of the EU's global leadership have deteriorated dramatically in China in comparison to 2015. Other significant changes are visible in India and South Africa, where public perceptions of the EU have improved – both in terms of likelihood and desirability. In Russia, perceptions regarding the likelihood of the EU's leadership has strengthened, while in Republic of Korea perceptions of its desirability have weakened, with the cumulative effect of widening the gap between likelihood and desirability in both cases.

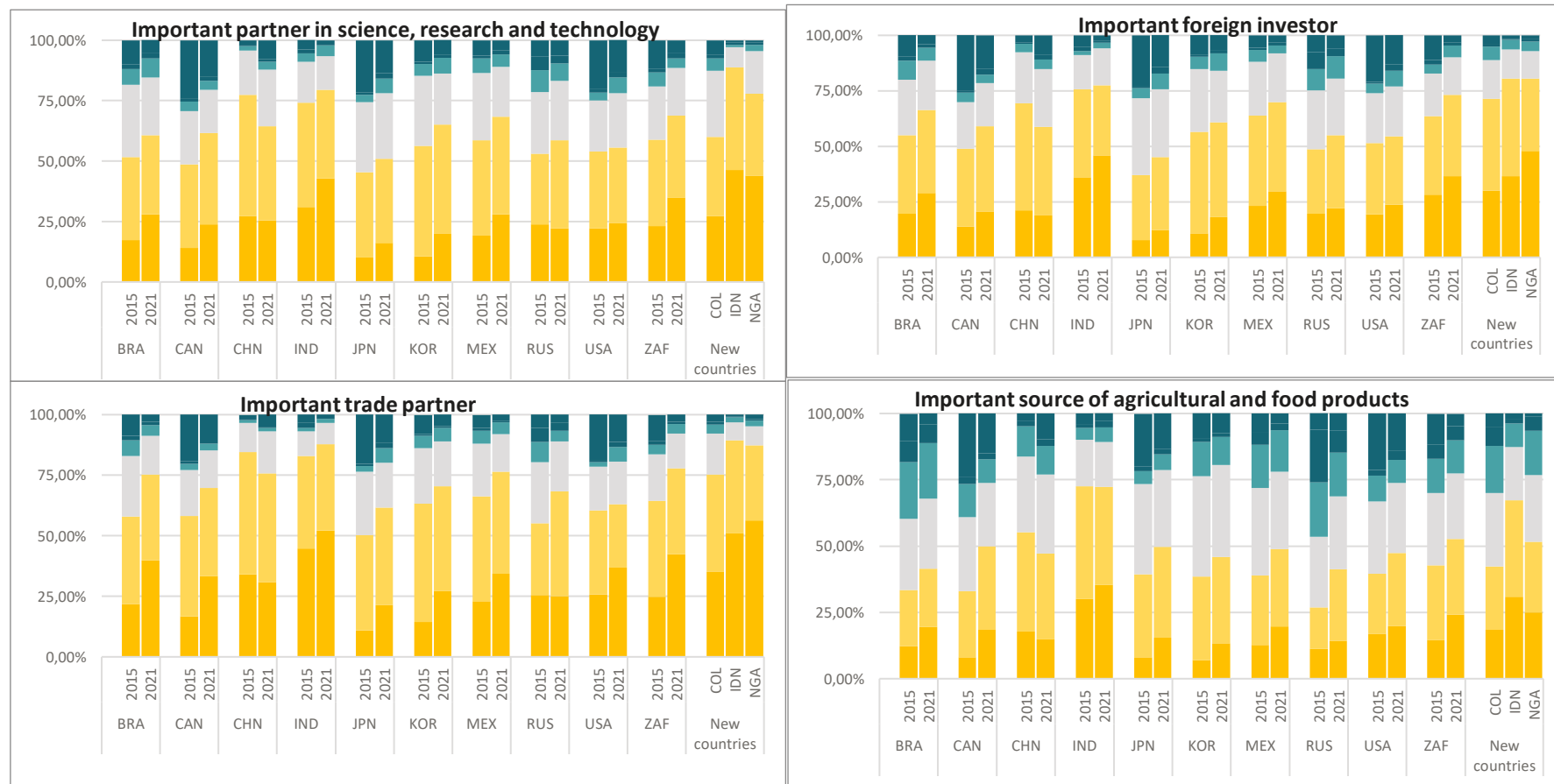
FIGURE 9. CHANGES IN PUBLIC OPINION REGARDING THE EU'S GLOBAL LEADERSHIP IN 2021 COMPARED WITH 2015



Source: Based on replies to survey questions 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?’, Public opinion surveys 2015 and 2021. The vertical axis represents the share of respondents who replied that the EU is ‘Very likely’ or ‘Somewhat likely’ to play a leadership role. The horizontal axis represents the share of respondents who replied that EU leadership is ‘Very desirable’ or ‘Somewhat desirable’.

When asked how important they perceived the EU to be in various fields – as a partner in trade, a foreign investor, a partner in research, science and technology, and an important source of agricultural and food products – perceptions had improved in all locations except China (Figure 10).

FIGURE 10. THE EU AS A PARTNER IN VARIOUS FIELDS: PERCEPTIONS IN DIFFERENT COUNTRIES



Source: Based on answers to survey question Q15: ‘Looking from your country’s perspective, how strongly do you agree or disagree with each of the following statements about economic relations with the European Union?’

2.4. The EU as a normative power

The general public rarely reflects on the EU as a norm setter. Normative themes in the EU's image, however, were visible in the reputable media coverage, as well as in reflections by local policy makers and opinion formers, as well as among students of leading national universities. However, the EU was a visible norm setter in the qualitative media analysis, elite interviews and focus group components of the study.

Perceptions of the EU as a capable actor that is able to promote and advance norms regarding climate and the environment – a new issue-area in 2021, compared with 2015 – are highly positive (e.g. in Brazil, India, Colombia, Russia). It is important to note that this perception often comes with high expectations, especially among educated youth. For example, the EU is *encouraged* by our respondents to act more proactively on the transfer of green technologies to India, to prioritise the environment over trade in Brazil, or to prioritise sustainable agriculture, eco-tourism and biodiversity in Colombia through trade agreements. The EU is perceived to possess skills, expertise and reputation in the field of the economy/trade that can impact external partners to improve their performance in the fields of environmental protection and climate change mitigation. It should, however, be noted that the image of the 'protectionist EU', observed in the literature on perceptions of the EU over the last 20 years, continues to be observed in 2021. While not dominant, another starkly negative perception is that associated with the image of an 'exploitative EU' observed in some developing locations.

In 2021, the most visible political profile is that assigned to the EU's strong position and action on violations of human rights and democracy around the world. EU actions in two cases capture most of the attention from the media and key audiences in all countries: China and Russia (specifically, China's treatment of the Uyghur Muslim minority, and the poisoning and imprisonment of Russian opposition leader Alexei Navalny). These findings are also corroborated by the public opinion poll, in which the EU's role in global human rights is recognised in a pronounced and positive manner across most locations.

In certain areas, the EU is not recognised as a norm setter, but rather as a *trendsetter* – for instance, among Indian audiences, in the issue areas of research, science and technology. The EU is also seen as a *trendsetter* on development, particularly when new technologies and the environment are concerned. There is perceived potential for the EU to advance its normative leadership globally through support to developing countries with regard to governance and development. The EU is perceived as a norm setter in providing support to developing countries to eradicate poverty and build a fairer and more stable world.

In the social issue area, results from the public opinion reveal highly positive attitudes towards the EU with regard to equality between women and men, in Nigeria, Indonesia and India. On the other hand, the youth see the EU as having problems with human rights violations inside the bloc (e.g. 'new' Member States such as Poland and Hungary, in terms of the protection of minorities, including LGBTI+ people and migrants, and the management of cultural diversity) as well as other challenges such as social inequality and the eradication of poverty. This leads to perceptions of 'double standards' and hypocrisy on the part of the EU. More action is expected from the EU with regard to the protection of minorities and gender equality – both within the EU and externally.

The EU is perceived as performing well in culture and sports, which adds to its normative image. Europe is often seen as having defined Western culture in general, and thus is seen a norm setter in this area. For instance, in the field of health, the EU is seen as a norm setter on health care in general. However, EU actions during the pandemic are perceived extremely negatively and as a blow to its normative role: the ban on vaccine exports was seen as a sign of the erosion of the EU as a normative power (for instance, in Mexico). COVID-19-related press reports, under the generic banner of 'vaccine nationalism', have undermined the EU's image as a responsible

international actor. On the other hand, and in line with the survey findings, EU statements and progress in vaccination are seen as guidelines for coping with the pandemic (Colombia), or even as a benchmark for other countries to follow (Republic of Korea). The EU's digital vaccination passport policy is reported in certain countries as a possible model to be implemented overseas. Meanwhile, on social media, various sources state that the EU urges a global vaccination plan, and that its role in this is necessary. The EU therefore remains a norm setter on health, albeit with a dented image.

2.5. Perceptions and socio-demographic factors

Table 5 below summarises how perceptions of the EU change according to the socio-demographic and individual characteristics of survey respondents. Some of these characteristics include gender, age, contact with Europe, whether or not they are sufficiently informed about Europe, household income, level of education, working status and the type of settlement in which they live (rural/urban). **Socio-demographic indicators are analysed in more detail in Annex II. Comparative public opinion survey report.**

TABLE 5. INFLUENCE OF SOCIO-DEMOGRAPHIC CHARACTERISTICS ON INDIVIDUALS' PERCEPTIONS OF THE EU IN 2021

	General view of the EU	Relationship with the EU	EU leadership (desirable)	EU leadership (likely)	EU influence in global economic affairs	The EU's attractiveness
Gender	Women ↑ (BRA, CAN, CHN, IDN, IND, JPN, RUS, ZAF) Men ↑ (KOR)	Women ↑ (CAN, CHN, IDN, RUS, ZAF) Men ↑ (JPN, KOR, MEX, USA)	Women ↑ (BRA, CAN, CHN, RUS, USA) Men ↑ (IND, JPN, KOR, MEX, NGA)	Women ↑ (CAN, CHN, COL, IDN, NGA, MEX, RUS, USA) Men ↑ (JPN, KOR)	Women ↑ (CAN, IDN, RUS, ZAF) Men ↑ (IND, JPN, KOR, MEX, USA)	Women ↑ (CAN, IDN, JPN, MEX, RUS) Men ↑ (KOR, NGA)
Age	Older ↑ (BRA, CAN, JPN, KOR, NGA) Younger ↑ (CHN, COL, IDN, MEX, RUS, USA, ZAF)	Older ↑ (CAN, COL, JPN, KOR, MEX, NGA) Younger ↑ (CHN, RUS, ZAF)	Older ↑ (BRA, CAN, IDN, IND, JPN, KOR, NGA, USA) Younger ↑ (CHN, COL, RUS)	Older ↑ (BRA, CAN, COL, IND, JPN, KOR, NGA, USA) Younger ↑ (CHN, IDN, RUS)	Older ↑ (BRA, CAN, COL, IDN, IND, JPN, KOR, MEX, NGA, USA) Younger ↑ (CHN)	Older ↑ (BRA, CAN, COL, IDN, IND, JPN, KOR, MEX, NGA, USA, ZAF)
Contact with Europe?	With contact ↑ (CAN, CHN, IDN, JPN, KOR, NIG, RUS, USA) Without contact ↑ (COL, ZAF)	With contact ↑ (BRA, CAN, CHN, COL, JPN, KOR, NGA, USA) Without contact ↑ (RUS)	With contact ↑ (BRA, CHN, IDN, JPN, KOR, NGA, RUS, USA) Without contact ↑ (CAN, COL, MEX, ZAF)	With contact ↑ (BRA, CHN, COL, IND, JPN, KOR, RUS, USA) Without contact ↑ (IDN, ZAF)	With contact ↑ (BRA, CAN, CHN, COL, IDN, IND, JPN, KOR, MEX, NGA, RUS, USA, ZAF) Without contact ↑	With contact ↑ (BRA, CAN, CHN, COL, IDN, IND, JPN, KOR, MEX, NGA, RUS, USA, ZAF) Without contact ↑
Sufficiently informed?	More informed ↑ (BRA, CAN, CHN, COL, JPN, KOR, USA, ZAF) Less informed ↑ (RUS)	More informed ↑ (BRA, CAN, CHN, JPN, KOR, USA, ZAF) Less informed ↑ (RUS)	More informed ↑ (BRA, CAN, CHN, IND, JPN, KOR, MEX, RUS, USA) Less informed ↑ (ZAF)	More informed ↑ (BRA, CAN, CHN, IDN, IND, JPN, KOR, MEX, RUS, USA, ZAF) Less informed ↑	More informed ↑ (BRA, CAN, CHN, COL, IDN, IND, JPN, KOR, MEX, NGA, RUS, USA, ZAF) Less informed ↑	More informed ↑ (BRA, CAN, CHN, IDN, IND, JPN, KOR, MEX, NGA, RUS, USA, ZAF) Less informed ↑

Household income	Higher income ↑ (USA, RUS, MEX, KOR, JPN, IND, CAN, BRA) Lower income ↑(NGA)	Higher income ↑ (USA, RUS, KOR, JPN, COL, BRA) Lower income ↑ (ZAF, NGA, CHN)	Higher income ↑ (ZAF, USA, RUS, KOR, JPN, IND, IDN, CAN) Lower income ↑ (COL, CHN)	Higher income ↑ (ZAF, USA, NGA, MEX, KOR, JPN, IND, COL, CHN, CAN, BRA)	Higher income ↑ (ZAF, USA, RUS, MEX, KOR, JPN, IND, COL, CHN, BRA) Lower income ↑(NGA)	Higher income ↑ (BRA, CHN, COL, IDN, IND, JPN, KOR, MEX, RUS, USA, ZAF) Lower income ↑ (CAN, NGA)
Level of education	More educated ↑ (CAN, COL, IDN, IND, JPN, KOR, RUS, ZAF) Less educated ↑ (BRA, CHN, USA)	More educated ↑ (CAN, COL, IDN, IND, KOR, MEX, NGA, USA, ZAF) Less educated ↑ (CHN, JPN, RUS)	More educated ↑ (BRA, CAN, IDN, MEX, NGA, RUS, USA) Less educated ↑ (CHN, JPN, KOR, ZAF)	More educated ↑ (BRA, IND, RUS, USA, ZAF) Less educated ↑ (CAN, CHN, JPN)	More educated ↑ (BRA, CHN, IDN, IND, KOR, MEX, NGA, RUS, USA) Less educated ↑ (CAN, COL)	More educated ↑ (BRA, COL, IND, KOR, MEX, RUS, USA, ZAF) Less educated ↑ (CHN, JPN, NGA)
Working status	Employed ↑ (BRA, COL, IDN, IND, MEX, NGA, RUS, USA) Unemployed ↑ (CHN)	Employed ↑ (BRA, COL, IDN, JPN, KOR, MEX, NGA) Unemployed ↑ (CAN, CHN)	Employed ↑ (BRA, IDN, IND, JPN, NGA) Unemployed ↑ (CAN, CHN, COL, KOR, ZAF)	Employed ↑ (BRA, COL, JPN) Unemployed ↑ (CAN, IDN, KOR, RUS)	Employed ↑ (BRA, CHN, COL, IDN, IND, JPN, KOR, MEX, NGA, RUS, USA, ZAF) Unemployed ↑ (CAN)	Employed ↑ (BRA, CHN, COL, IDN, IND, RUS, ZAF) Unemployed ↑ (CAN, JPN, KOR, NGA)
Type of settlement	Urban ↑ (USA, KOR, IND, IDN, COL, CHN, CAN, BRA) Rural ↑ (ZAF, RUS, NGA, JPN)	Urban ↑ (USA, MEX, KOR, IDN, COL) Rural ↑ (ZAF, RUS, NGA, JPN, CHN, CAN)	Urban ↑ (USA, MEX, KOR, JPN) Rural ↑ (ZAF, RUS, NGA, CHN, CAN)	Urban ↑ (ZAF, USA, RUS, MEX, KOR, COL, BRA) Rural ↑ (IND, CHN, CAN)	Urban ↑ (USA, RUS, MEX, KOR, IND, IDN, BRA) Rural ↑ (COL)	Urban ↑ (COL, IDN, IND, KOR, RUS, USA, ZAF) Rural ↑ (BRA, CAN, CHN, MEX, NGA)

Source: Prepared by the Core Team based on the public opinion survey data.

Note: Based on country-specific cross tabulations generated from poll results for analysis of explanatory variables. ↑ indicates that respondents in this group tend to hold a more positive opinion.

2.6. Summary findings on perceptions of the EU across themes and target audiences

The Executive summary presents a condensed version of Volume I and Volume II of this study. It summarises the attitudes towards the EU in the 13 target countries. In the following sections, we explain how perceptions of the EU have changed over time across the various thematic frames. We then proceed to outline the key target groups and audiences for the EU’s public diplomacy activities.

Volume I of the study presents detailed findings of the Update study across themes and key audiences.

2.6.1. Main findings across themes

Table 6 summarises the key themes with regard to perceptions of the EU across the research criteria of the study.

TABLE 6. SUMMARY TABLE OF KEY THEMES

	VISIBILITY	ACTORNESS AND EFFECTIVENESS	THE EU AS A NORM-SETTER	LOCAL COGNITIVE RESONANCE
Economy	Strong, with emotive assessment varying according to the perceived benefit or threat to the location that is presented by EU activities within a particular economic issue area	Highly active, cohesive and effective, as well as resilient to crises	Strong/effective (may hurt or help the location)	Very strong location-specific grounding
Politics	Strong (increasing over time), mixed	Active, ranging from cohesive to non-cohesive, partially effective	Strong and mixed effectiveness, and in some instances with 'double standards'	Through the prism of bilateral relations: visible, and positive when perceived as benefitting the location
Climate and environment	Strong (increasing over time), largely positive/to a smaller extent mixed	Active, ranging from cohesive to non-cohesive, partially effective	Strong, mixed effectiveness, high local expectations triggering some negative perceptions	Strong 'local hooks', and from positive perspectives
Energy	Low, mixed	Active, ranging from cohesive to non-cohesive, partially effective	Trendsetter when linked to climate and the environment	Patchy, seen through a geopolitical lens in some locations
Research, science and technology	Low, positive	Active, ranging from cohesive to non-cohesive, partially effective	Trendsetter	High, when connected to a research agenda that is of local relevance
Development and assistance	Weakest of all themes in the 13 target countries, yet positive	Active, cohesive (with some reservations), capable	Strong and effective	With a strong 'local hook' and context
Social	Significantly less pronounced compared with the Baseline Study, positive to mixed	Varies by sectors from active, cohesive and highly-effective in internal social development and education, to less active, cohesive and effective in migration	Strong (apart from the field of migration), yet ineffective	Resonates with local public as a benchmark to follow
Culture	Weak (for the EU)/strong (for Europe); positive	Inactive, cohesive, capable	Strong, capable	Colonial legacies contribute to the negative framing of the EU; cultural heritage

				and family ties lead to the opposite
Health	Strong, negative to mixed	Ranging from inactive, non-cohesive and non-effective to more capable and coping	Weakened, ineffective	Strong and negative when actions affect the location's handling of the pandemic; strong and positive where the EU is helping to fight COVID-19 in the location

Source: Prepared by the Core Team.

The **economy** remains at the core of perceptions of the EU in all partner countries and across all cohorts and methods used in the Update Study. Strong associations with the economy in general and trade in particular constitute stable and central elements of the EU's image. Across the 13 countries in the 2021 Study, the EU is framed and perceived as a visible economic actor – bilaterally with the individual target countries, as well as in their respective geo-strategic regions and in the world. **Trade** is the area in which the EU is expected to have the most impact, and the importance of the EU as a trading partner is well recognised in the 13 locations covered by the 2021 Study.

Politics is another core element of perceptions of the EU. Overall, perceptions of the EU as a political actor have become more visible and more intense compared with 2015. Politics is the most widely covered of all the themes. The Update Study finds attitudes in this issue area to be heavily influenced by the perceived alignment of EU policies with local interests. Perceptions of international leadership by the EU remain ambiguous overall, echoing the trends reported in the 2015 study. The EU is seen by decision makers and educated youth as having the capacity and capability to be an influential political-normative actor and an international leader. At the same time, external observers question its effectiveness, as it is often seen as not affecting the overall international system as much as other actors.

In 2015, the theme of **climate and the environment** played only a marginal role, and did not significantly drive the visibility of the EU. In 2021, while the issues of climate change and the environment make up only 4% of total media coverage regarding the EU, this theme drives the visibility of the EU in relation to news that focuses on it as a major actor. The qualitative media sample reveals that in many locations, climate change and the environment appeared on an equal footing with the economy, health and politics. While the visibility of this theme has increased since 2015, the EU's perceived actorness with regard to these issues has decreased among the general public across all locations.

Similarly to 2015, the visibility of the EU in relation to the issue area of **energy** remains low, although perceptions of the EU as a global energy actor have gained increasing attention in the literature. In 2021, only 5% of all coverage of the EU in the traditional media sample was dedicated to energy. Social media also pay little attention to this theme. The visibility increased when the theme blends with climate and environment.

While theme of **research, science and technology** has received an increasing attention in the media in 2021 in comparison to 2015, its overall media profile remains low. The increase in visibility is mostly driven by global and EU-specific factors, and is linked to an increasing blending of themes. For example, the EU's research, science and technology matters were often reported in conjunction with news about the EU's actions on COVID-19, health in general, as well as climate and the environment. The EU's perceived importance in the field of **research, science and technology** varies between countries and cohorts.

Development is the least visible theme in perceptions of the EU in traditional media. Only in few countries interviewees referenced this area as important for bilateral cooperation with the EU. In such countries, the EU is perceived highly positively – as one of the international leaders, often equal or second to the UN (or the

US/China/ASEAN, depending on the region), and with the potential to achieve even more. The perceived actorness and effectiveness of the EU depend on how the country in focus perceives its own actorness in this field.

In the **social** theme, in 2015, the irregular migration crisis boosted the visibility of the EU. In 2021, EU visibility on social issues (other than health, see below) is significantly less pronounced, and depends on the topic concerned. However, in social indicators, the EU continues to be seen across all 13 countries as a highly effective and high-performing actor, particularly with regard to quality of life in the EU.

In traditional media, **culture** is fifth most widely covered theme, accounting for 8% of total media coverage of the EU. Overall, the media and social media continue to associate culture – and sports – with Europe, rather than the EU. According to the public opinion survey, across all 13 countries, the attractiveness of culture and lifestyle in the EU is high. The EU is appreciated for its monuments and museums, history, food and cuisine, lifestyle, luxury goods, clothing and the arts. Lifestyle, food and clothes appeal more to youth in particular, and the EU's performance in tourism ranks high as well.

In contrast to the 2015 Study, in which **health** was covered as part of the social theme and overshadowed by migration, the EU's reactions to the COVID-19 pandemic have significantly increased the EU's visibility in this issue area in 2021. Health is third most widely covered thematic frame in traditional and social media; however, youth and experts do not rank health as a top area for cooperation between the EU and their country. According to the survey, the public finds that the EU performs well in terms of medical research and even in global health. While the global health category produced more mixed or ambiguous replies and fewer positive evaluations compared with other fields of the EU's performance, the share of respondents who rate the EU's performance as 'fairly bad' or 'very bad' in this field is low.

1.1.1.1. Main findings on the key audience groups and audiences

The Update Study finds that the profile of key audiences for the EU public diplomacy depends on the theme of an outreach event and the accessibility of the public. Policy and decision makers as well as representative of business feature more prominently in events associated with the areas of 'hard power' politics, such as security, politics and the economy. The EU is most visible among these audiences in the partner countries. However, foreign policy practitioners – as a key audience of public diplomacy – are mentioned in the interviews with EU Delegations and local experts only briefly and mostly in the context of state-to-state contacts as part of day-to-day diplomatic exchanges. Promisingly, interviews with EU Delegation practitioners highlighted several countries in which there is active engagement between EU Delegations and young local diplomats in the form of exchange visits by these young diplomats to Brussels, as well as regular meetings of the Head of the EU Delegation with young diplomats at a local MFA for skills-oriented seminars. These initiatives have, however, been limited due to the COVID-19 pandemic. Meanwhile, interviews with EU policy practitioners, local experts and to a smaller extent media analysis reveal an increased number of 'blended' events that introduce the EU to broader audiences: the general public and strategic publics – local and regional governments, media, youth, think tanks and academia. The themes of such events are also 'blended', and address issues important to local audiences (the economy, security, climate and the environment, RST, development), encouraging a higher rate of participation.

As follows, key audiences and their significance for EU public diplomacy are informed by the empirical findings in terms of their visibility, reception and perception of the EU:

Government agencies and representatives remain a key group of stakeholders for EU diplomacy. Building relationships – in particular on the working level – is key especially where the bilateral relationship is implicated

by negative historical experiences (colonialism for example) or adverse administrations as informed by the empirical findings of this Study.

National agencies – especially, in the context of the pandemic, health agencies – feature increasingly in the Update Study. Such agencies can be a strategic audience in particular when political relationships are tainted and around key themes such as health. Outreach to this stakeholder group is found to be easier than to adverse governments especially when such outreach centers around specific themes (for example support for vaccination- roll out). It can help build relationships around knowledge sharing and best practice exchanges.

Interviews with EU public diplomacy practitioners from 13 EU Delegations confirmed that **business audiences** remain highly relevant to EU public diplomacy in the context of trade, investment and the economic benefits that economic cooperation between the EU and strategic partner may bring. The analysis of external perceptions demonstrates that expectations of such benefits and the conclusion of trade agreements tend to drive positive images of the EU in general, and particularly among those businesses and entrepreneurs who already cooperate with the EU. However, the negotiations of trade agreement, and especially around sensitive issues, may stir mixed perceptions.

The way in which **media** representatives in different countries handle reporting about the EU differs significantly between locations, outlets and issues. EU public diplomacy outreach to local news writers and gatekeepers must depend on the respective media environments of the countries concerned, and the political consequences for local media professionals of such outreach. While for some locations, direct dialogue and advocacy with the most prolific news writers and key gatekeepers represents the most effective mode of cooperation, in other locations outreach may consist of providing support to local media organisations through training, exchanges and education.

Civil society remains a crucial audience for EU public diplomacy, because it establishes a base for long-term and in-country cooperation. Across all key partner countries, civil society organisations remain highly receptive to EU norms and messages. Irrespective of their degree of awareness, knowledge of and engagement with the EU, grassroots civil society organisations will remain a key audience for the EU able to assist with broader outreach and in communicating a positive image of the EU if they are engaged in co-creative relationship through mutually-beneficial shared-leadership projects.

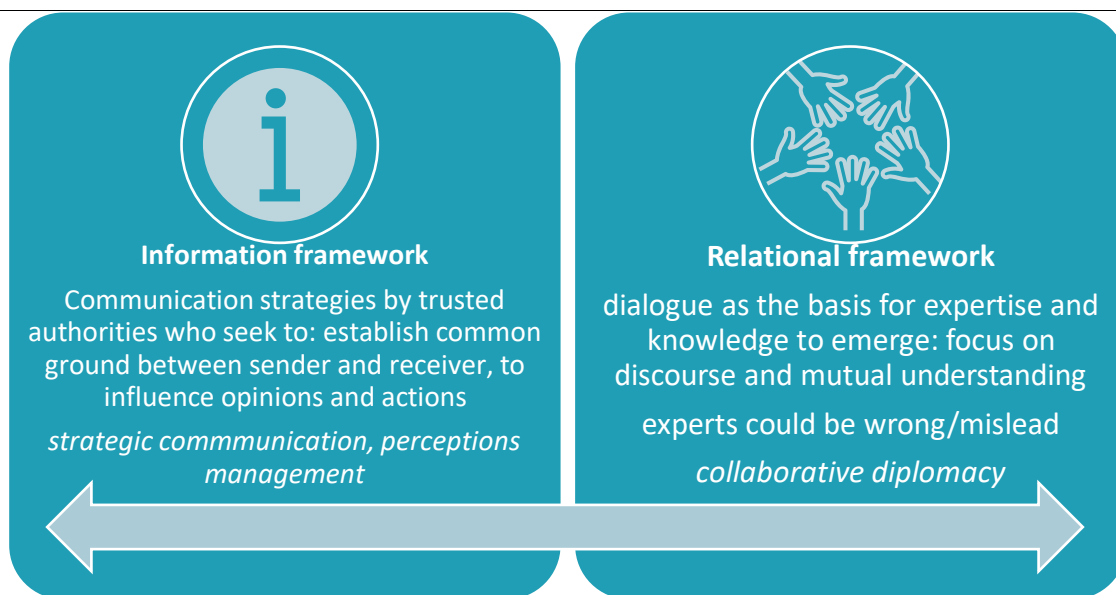
As one of the key audiences for its public outreach, **academia and think tanks** remain highly aware of the EU. This group includes numerous beneficiaries of exchange programmes and joint scientific projects run by the EU and its Member States, as well as intellectuals who interact/collaborate with European colleagues as a part of their extended professional networks. The members of this key group acknowledge that this support allows them to advance from short- to medium- and long-term research collaborations that focus on the EU, and to initiate regular and ongoing dialogues with EU colleagues, stakeholders and students on various topics including norms and values.

This section highlights the key audiences for the EU public diplomacy, as identified by the literature review, traditional and social media analyses, as well as via focus groups with youth and interviews with decision makers in the 13 partner countries. The section also references the audiences addressed by EU public diplomacy initiatives as identified by EU policy practitioners in the respective locations.

Aggregated policy recommendations

Two conceptual visions of public diplomacy. In our mapping of EU perceptions and their evolution and in the design of the policy recommendations, we understand that there are two conceptual visions of public diplomacy – as a strategic communication and as a tool for dialogue and relations. Neither practice nor scholarship can agree which of both should guide the approach to public diplomacy. The Update Study 2021 has inherited this ambiguity, but it addresses both in its design and in policy recommendations.

FIGURE 11. SITUATING PUBLIC DIPLOMACY (BASED ON GREGORY, 2008; SNOW, 2009; ZAHARNA, 2009)



Source: Prepared by the Core Team.

3.1. Setting policy recommendations in this Study

Aggregated recommendations are not a prescription, but a structured “menu of choice”: they combine new suggestions and stress already existing initiatives, perceived internally and externally as best practice.

- EU Delegations are already successfully undertaking many of the activities listed in this section. Yet, not all listed recommendations are carried out by all Delegations. Initiatives are already listed here if internal and external receivers report positive perceptions of existing initiatives to create a *toolbox of best practices* that can support the development of an EU public diplomacy strategy.

Aggregated recommendations are informed by the empirical findings of the multi-method study.

- Empirical findings are the leading input into the policy recommendations. All methods in the Update Study 2021 are informed by the same set of the guiding indicators as the Baseline Study 2015. They are also informed by the existing concepts in the field of public diplomacy.

There is no single/best/one-fit-all approach across all countries.

- The list of recommendations is extensive as every location in the Update Study has a unique set of perceptions of the EU and recommendations that follow.

Long-term strategy-oriented recommendations and short-term practice-oriented public diplomacy recommendations.

- The long-term policy recommendations outline recommendations of strategic character, while short-term practice-oriented recommendations aim at a tactical and operational level. They should be considered together and work in interaction with each other – practice-oriented recommendations have firm roots in policy-level aims and objectives.

3.2. Summary of recommendations

Presentation of the aggregated recommendations are contextualised by game changers in public diplomacy - the “5Cs” (see Figure 12 below). The 5Cs are the organising principles of the recommendations. The recommendations are structured as **long-term strategy-oriented recommendations** and **short-term practice-oriented public diplomacy steps**.

FIGURE 12. CONTEXTUALISING RECOMMENDATIONS: THE 5CS



Source: Prepared by the Core Team.

3.2.1. 1C. Complexity of global communication landscape

International communication is increasingly impacted by fragmented information flows produced by multiple narrators on state and non-state levels, domestic and global, and this impacts public diplomacy practice. Narrative formulation, projection and reception are of heightened importance in a world of growing geo-political rivalry, economic competition, increasing multipolarity and normative contestation.

Long-term the EU will have to understand, master and interact “through” this landscape. Upgrade the EU’s strategic narrative that builds on policies perceived positively by key partners. Fine-tune the projection of the narrative regularly by incorporating external reception on the *systemic* (how the world is arranged), *identity* (norms and values) and *issue-specific* (informed by concrete policies) levels. Invest into assessment and practice of *alignment* between narrative levels - critical for higher effectiveness of the narrative – as well as alignment with policies and how the EU acts internationally. A coherent, positive and attractive narrative is of even higher

importance during crises. The effect of the COVID-19 pandemic on image of the EU identified by the Update Study 2021 calls for “Blue Skies” exercise at a strategic level.

Practice-oriented steps:

- Devise a strategic narrative approach that frames common message based on values and interaction *with* partners formulated through resilient vision of what the EU wants to be in the future.
- Initiate/sustain knowledge exchange and best practice sharing platforms on the ground in third countries on key areas such as climate change, green tech and scientific innovation (for example in health) by bringing together local and EU stakeholders: to advance the EU’s “listening” position and create a positive story around collaboration and coordination.
- Fine-tune and diversify location-specific media outreach programmes and a multi-channel coordinated strategy in collaboration with opinion-makers in each location.

3.2.2. 2C. Co-creation

Growing multipolarity and proliferation of international actors on the world stage (state and non-state) mean increased competition for influence and contestation. Actors around the world want *to be heard*. They also do not want to be passive receivers of messages and actions only – but meaningful *co-creators* of the mutually beneficial initiatives and relations.

Long-term public diplomacy becomes a collaboration project with shared leadership. The EU Delegations have the knowledge concerning local contexts and local actors as well as skills and expertise in reaching out. Ensure that this knowledge and these skills are used to keep moving from *monologue-dialogue-collaboration* to *empathetic monologue -- genuine/true dialogue where both sides learn from each other -- mutually beneficial collaboration with shared leadership*. Commit to *creating spaces useful for both the EU and local partners*, where EU activities help to sustain local networks in their own spaces meeting local priorities and entrenching shared values working together towards common goal.

Practice-oriented steps:

- Begin all major public diplomacy activities, innovations and strategies with systematic open-ended listening
- Position EU Delegation in the role of the network facilitator and information manager: credibility and partnership trustworthy leadership and genuine empathy, and particular in response to crises of different scope

3.2.3. 3C. Community

Overall, the EU continues to be perceived as lacking unity and as partially inconsistent within. The Update Study 2021 observed one major change from the 2015 Baseline Report. The competition between EU Delegations vis-à-vis Embassies of EU Member States -- noted as a strong perception in 2015 -- is less of a topic in 2021. In many locations, such competition is not perceived at all. This community approach on the ground is associated with a positive self-reflection (identified in the interviews with EU Delegations).

The long-term recommendations are to continue to synergise efforts across European diplomatic actors on the ground (EU Delegations, EU Members States, other European institutions); maximise communication outreach of each other; complement each others’ public diplomacy expertise/action; assist smaller states which may not have diplomatic representations in a key partner country or lack resources for larger-scale public diplomacy actions on the ground

Practice-oriented steps:

- Continue to combine initiatives with EU Member States embassies.
- Undertake commonly developed communication strategies.
- Archive and share best practices.

3.2.4. 4C. Climate/ Cultural/ RST/ Sports Diplomacy

The climate crisis and the multipolarity and proliferation of actors in the climate space mean that competition and contestation are shaping the global climate governance conversation while multilateral and domestic progress have to accelerate to deliver climate change mitigation and adaptation at speed and scale. Climate and global climate governance are understood through multiple prisms including how the EU is seen to act within the multilateral process, on the international stage and how progressive it is domestically and how delivers on its ambition.

The long-term recommendations. Reinforce and advance further its Climate Diplomacy, Science and Innovation Diplomacy, Education Diplomacy, Cultural Diplomacy and Sports Diplomacy drawing on the very positive perceptions across the key partner countries of European/EU Member States' culture, arts, history, sports, lifestyle, business as well as the EU Green Deal and international efforts and international leadership in fighting climate change, expertise in RST and high reputation in education.

New to 2015 is a pronounced positive perception of the EU's role in spearheading research, science and innovation to save the environment and curb climate change as well as innovations in the medical sector observed among national experts, educated youth and leading media. Importantly, while each of these themes (apart from climate) might not drive visibility, climate links to a wide range of issue areas including RST.

Practice-oriented steps:

- Build institutional and governance structures that mainstream climate change into wider organisational public diplomacy thinking.
- Test frameworks and pilot models for outreach activities while enhancing leadership profile.
- Support capacity building and funding activities in especially climate, RST and culture.

3.2.5. 5C. COVID-19 and digital diplomacy

The COVID -19 pandemic has brought major changes to the practice of public diplomacy. A protracted lack of people-to-people contacts, heavy reliance on digital means, and uncertainties around when and how to emerge from the pandemic, challenge public diplomacy of the EU and highlight the importance of advanced creative tools in digital diplomacy. The Update Study 2021 demonstrated that EU Delegations in the 13 studied countries have developed extended arsenals of digital means to communicate the EU and run events when personal contacts are curtailed. This is a major difference to the 2015 Study. In the uncertain post- COVID world dominated by new media ecology, hybrid public diplomacy – cleverly combining face-to-face and online tools, strategies and initiatives – will lead.

Long-term recommendations. Build on the positive perception of the 'resilient EU' – and specifically among educated youth and local opinion-formers. Counterbalance the emerging negative perceptions of the EU affected by COVID-19 in a timely manner. Digital diplomacy means are critical in this regard. Build on benefits of digital diplomacy such as strengthening relationships, proximity with audience, speed, effectiveness and low cost. Address risks of digital diplomacy linked to mis- and dis-information flows as well as cybersecurity.

Continue to use digital tools to reach out to audiences beyond existing "bubbles" of those who are friendly towards, interested in and informed about the EU and engage with a range of audience in dialogue. Balance using social media for *monologue/projection* with *engaged, respectful, culturally-sensitive empathetic dialogue*. Boost

the *collaboration* element by involving local experts into the co-design of the digital diplomacy platforms and campaigns.

Practice-oriented steps:

- Develop common strategic communication/ public diplomacy toolkits and best practices for in-person, hybrid and modes learning lessons from the pandemic period -- in EU Delegations, institutions and Member States.
- Embody digital diplomacy and include digital diplomacy tools and trainings in EU institutional traineeships.
- Resume exchange diplomacy in flexible location-specific modes.

Summary overview of country-level recommendations

This chapter presents a summary of country-level recommendations. **For detailed information on country level analysis, please refer to Volume II of the study.** Volume II presents the country case studies for 13 target countries. Each of them integrates all the gathered data for a particular country and contains findings on visibility, actorness and local resonance, and local conditions to explain EU perceptions in a particular target country. Moreover, each country chapter contains sections on continuity and change in EU perceptions and country-specific recommendations for EU public diplomacy.

4.1. Brazil

Summary

In 2021, the EU is more visible and more positively evaluated in Brazil, compared with the findings of the 2015 study. The Brazilian general public sees the EU as more modern, efficient, peaceful, united and stronger in 2021, than it did in 2015, as well as less arrogant, aggressive and hypocritical. Compared with 2015, a larger share of respondents in 2021 think that the EU is trustworthy and *should* have stronger political ties with Brazil, although a smaller share of respondents think that the EU actually *is* an important partner to Brazil in international relations compared with 2015. In addition, China has now surpassed the EU in terms of the perceived likelihood of its international leadership in the future and its influence in global economic affairs, in the eyes of the Brazilian public. Expert interviews and youth focus groups reveal perceptions of the EU's actorness being weakened in relation to global economic affairs as well as global peace and stability. In 2015, press coverage of the EU was more emotionally charged – particularly in the context of the Greek debt crisis and the migration crisis. In both these instances, the EU was portrayed as having acted too harshly. In contrast, the most negative evaluations of the EU by traditional Brazilian media in 2021 are in the context of the EU's handling of the COVID-19 pandemic. Rather than an actor that acts too harshly, the EU is portrayed in this new context as somewhat inefficient. However, while youth and experts in 2015 expressed perceptions of the EU as an arrogant actor, establishing a vertical, top-down, one-way relationship with Brazil, in 2021, both the youth focus group and the expert interviewees reveal a desire for *more* EU pressure on the Brazilian government – particularly with regard to deforestation and climate, as well as undemocratic practices and human rights violations. The EU's performance across social development indicators such as quality of life and level of education, EU culture and lifestyle, plus the EU's role in fighting global climate change and protecting the environment, all continue to contribute to its increasingly positive perception among the general public, youth and experts.

Themes recommended for EU public diplomacy:

Environment/climate change; research, science and technology; democracy/human rights.

Environment/climate change

Whom to involve from key audiences:

EU and Brazilian diplomatic communities; EEAS; Global Affairs Canada; Academia (including students); think tanks (e.g. CEBRI); NGOs (e.g. Instituto Socio-Ambiental, Instituto Clima e Sociedade); government institutes

(e.g. IBAMA, ICMBio); members of the Brazilian National Congress (focus on the participants in the Inter-parliamentary dialogues); members of legislative and executive at local/city level; Jean Monnet Chairs (USP, FGV-Rio, PUC-Rio, UFMG, UFGD, UFSC, UFRGS, UFC, FECAP); federal and state-level business associations (CNI, FIESP, FIRJAM).

Research, science and technology

Whom to involve from key audiences:

Academia (including students); think tanks; governmental funding authorities (FINEP, CAPES, CNPq, CONFAP); Jean Monnet Chairs (USP, FGV-Rio, PUC-Rio, UFMG, UFGD, UFSC, UFRGS, UFC, FECAP).

Democracy and human rights

Whom to involve from key audiences:

Journalists and independent journalism agencies such as Agência Pública and Ponte Jornalismo; human rights activists; NGOs; indigenous groups; women; LGBTQ+; youth (Artigo 19, Instituto Auschwitz Brasil, Instituto Terra Trabalho e Cidadania, Conectas, FASE, REBRIP, Instituto Jô Clemente and Instituto Alana); Jean Monnet Chairs (USP, FGV-Rio, PUC-Rio, UFMG, UFGD, UFSC, UFRGS, UFC, FECAP); beneficiaries of projects under the European Instrument for Democracy and Human Rights.

4.2. Canada

Summary

Overall, the EU is perceived in Canada as an actor of high significance. Its influence is considered positive, as was already the case in 2015. The areas in which the EU is perceived as having the most impact are free and open trade, and international politics (particularly multilateralism), which is also reflected in the literature regarding perceptions of the EU. Multilateralism and the defence of the rules-based international order have become more prominent topics since 2015. Aspects of the EU's image that are most visible according to the public opinion survey also relate to the economy, as well as various elements that point to a shared Canada-EU identity (multilateralism, democracy, minority rights and cultural affinity). Traditional media (leading press outlets) and social media also focus largely on the EU in the context of economic affairs, but also on health – specifically due to the COVID-19 pandemic. Interviews and focus groups place a greater emphasis on the EU's activities with regard to politics, the environment and, to some extent, social affairs (more so than the media). The environment has become a more central issue in the eyes of experts and decision makers than it was in the 2015 study.

Themes recommended for EU public diplomacy:

International politics; domestic politics; trade and the economy; social issues; culture; education; research, science and technology; media.

International politics

Whom to involve from key audiences:

EU and Canadian diplomatic communities; EEAS; Global Affairs Canada.

Domestic politics

Whom to involve from key audiences:

EU Delegation; members of the federal parliament; leading political figures; provincial heads of government; Canadian Council of the Federation.

Trade and economy

Whom to involve from key audiences:

EU Delegation; Canadian roundtable for sustainable beef; Canadian meat industry; Europe Enterprise Network Canada members (EUCCAN, EU Chamber of Commerce West); Member States' chambers of commerce and trade counsellors; Canadian Federation of Independent Businesses.

Social issues

Whom to involve from key audiences:

European Commission; Global Affairs Canada; EU Delegation; Canadian civil society organisations; Canadian media.

Culture

Whom to involve from key audiences:

EU Delegation to Canada; EU Delegations in other relevant countries; EUNIC Canada; EUNIC Canada members; EU Member States' cultural institutes in Canada; Canadian Museum of Immigration; Arctic Council; Canadian Council for the Arts.

Education

Whom to involve from key audiences:

EU Delegation; European Commission; Canadian school boards; Canadian universities; EU Alumni Network.

Research, science and technology

Whom to involve from key audiences:

EU Delegation; Horizon 2020 research consortia; Canadian universities; Euraxess North America.

Media

Whom to involve from key audiences:

EU Delegation; European Commission; Canadian Association of Journalists; Fédération professionnelle des journalistes du Québec (FPJQ); Canadian universities (media and communications); provincial and First Nations media channels (press, TV).

4.3. China

Summary

Compared with the 2015 Baseline Study, the EU's image in China has deteriorated considerably. Although in most spheres of activity, the EU is still regarded as an important and overall positive actor by more than half of respondents in China, the share of respondents expressing positive views of the EU on various subjects has decreased by 10 per cent or more over the last six years.

The most significant change over the last six years is the fact that the EU has fallen behind Russia in the eyes of Chinese public in their overall perceptions of the bloc as a positive and potent actor.

Experts and focus group participants repeatedly present views of the EU as an actor that is dependent on, and following the lead of the US in international relations, which Chinese public and experts see as the likely global leader in the future. The Chinese elites value the EU as a trading partner, but regard it as dependent on the

political lead of the US, which prevents the EU from benefiting from EU-China relations. The EU is also perceived as an actor that could gradually fall behind in such important spheres as science, research and technology, as well as overall economic performance.

The EU's efforts to export its values to Russia and China contradict China's diplomatic principle of non-interference. The EU is still regarded as an important partner for China in collaborations on international political and economic affairs and tackling climate change, but negative perceptions remain with regard to the EU's troubled external relations with Russia and its perceived lack of internal solidarity.

EU efforts to fight global climate change are perceived positively in China, and provide the basis for bilateral EU-China cooperation.

Themes recommended for EU public diplomacy:

Trade; climate and the environment; culture; social issues/welfare system.

Whom to involve from key audiences:

Business; academia (including students); EU Delegation; European Commission; EU/Member States' academic exchange programmes; EU Member States' cultural diplomacy institutions.

4.4. Colombia

Summary

In Colombia, the EU is perceived overall as a highly significant actor. Its influence is considered positive and impactful, especially with regard to peace and trade, as a result of its support for the Colombian Peace Process and actions in the post-conflict scenario, as well as in connection with EU-Colombian Trade. The areas in which the EU *is expected* to have the most impact are climate and the environment, as well as the social issue area, and health. The literature regarding perceptions of the EU focuses on those issues that are linked to the role of the EU as a trade partner to Colombia and a supporter of the Colombian peace and post-conflict process, and reveals positive connotations being assigned to the EU more broadly. The aspects of the EU's image that are most visible among the general public in Colombia are as an important trading partner and trustworthy international partner, which should have stronger ties with Colombia. In traditional media, the EU is most visible in news relating to the economy, politics and health. Among the multipliers and influencers interviewed, and well as students participating in the focus group, the image of the EU is more pronounced in the thematic issue areas of the economy and politics as well as climate and the environment.

Themes recommended for EU public diplomacy:

Economy; politics; development; social; research, science and technology (education); climate and the environment; health; culture.

Economy

Whom to involve from key audiences:

National and local economic associations (e.g. rural women's associations, indigenous associations, Afro-Colombian associations, rural youth associations); rural or local communications media (community radio stations, local newspapers, local television channels); Colombian Ministry of Agriculture and Rural Development; Colombian Ministry of Commerce, Industry and Tourism; Colombian Ministry of the Environment and Sustainable Development; Regional Autonomous Corporations (in each specific region).

Politics

Whom to involve from key audiences:

Traditional political parties, as well as new political and civil society actors (e.g. new political parties, youth political organisations, student's organisations, women's political groups, indigenous and Afro-Colombian organisations, rural political organisations, human rights organisations, etc.); Ombudsman's Office; Colombian High Commissioner for Peace; Presidential Council for Human Rights; Agency for Reincorporation and Normalization; Colombian Ministry of Foreign Affairs, and the Presidency of the Republic of Colombia.

Development

Whom to involve from key audiences:

Political, economic and civil society organisations from the regions, focusing on minorities and disadvantaged communities, women, and youth organizations, among others; local authorities; Colombian Civil Defense, local volunteer firefighters; National Unit for Disaster Risk Management; Colombian Ministry of Foreign Affairs; Colombian Ministry of Defense; Colombian Ministry of Health and Social Protection; National Planning Department (DNP); Presidential Cooperation Agency (APC)

Social and research, science and technology (education)

Within the social theme, the EU stands out above any other actor in Colombia. In interviews, various focus groups do, however, call for a strengthening of the EU's efforts with regard to the sub-theme of education, as well as in research, science and technology.

Whom to involve from key audiences:

Groups of teachers and academics from different regions of the country, as well as national universities/technical institutions and associations; local authorities in each region; Colombian Ministry of Education and local education secretariats; National Planning Department (DNP).

Climate and the environment

Whom to involve from key audiences:

National and local environmental and climate organisations; private and public sector banks and investors; students, universities/technical institutions; environmental influencers and activists; businesses and sector leads in clean power and grid infrastructure; local authorities; civil society and minority groups who are particularly vulnerable to climate change; regional corporations; traditional local and national media; development partners; Colombian Ministry of Environment and Sustainable Development; Colombian Ministry of Education.

Health

Whom to involve from key audiences:

Health sector institutions, public and private (universities, national and local health institutions, laboratories and health research centres); National Institute of Food and Drug Surveillance (INVIMA); Colombian Ministry of Health and Social Protection; local health secretariats; EU counterparts.

Culture

Whom to involve from key audiences:

Universities/technical institutions and students in degree courses relating to culture; cultural organisations at national and local level (arts, sports, music, literature, architecture, etc.); cultural influencers; Colombian Ministry of Culture; Colombian Ministry of Sports; EU cultural organisations; EU Member States' cultural institutes; regional cultural organisations and NGOs.

4.5. India

Themes recommended for EU public diplomacy:

Politics; climate change and the environment; cultural diplomacy and educational exchanges; strengthening local outreach and raising awareness in other thematic fields.

Politics

Whom to involve from key audiences:

Indian diplomatic communities; key regional stakeholders; leading academic institutions, think tanks and even schools in India to ensure a wider range of views is listened to.

Climate change and the environment

Whom to involve from key audiences:

EU institutions (EEAS, EU Ambassadors); EU Member States (embassies, public diplomacy events); Indian diplomatic and business communities; leading academic institutions and think tanks; key actors in the field at regional and local level.

Cultural diplomacy and educational exchanges

Whom to involve from key audiences:

EU institutions (EEAS, EU Ambassadors); EU Member States (embassies, cultural advisers and public diplomacy events); Indian diplomatic and cultural communities; key cultural stakeholders at national, regional and local levels; leading cultural schools.

Strengthening local outreach and raising awareness in other thematic fields

Whom to involve from key audiences:

EU institutions (EEAS, EU ambassadors); EU Member States (embassies, public diplomacy events); Indian diplomatic and business communities; key regional stakeholders; schools and academic institutions; think tanks; local influencers in the areas targeted.

4.6. Indonesia

Summary

Overall, the EU is perceived in Indonesia as an actor with a significant positive impact on the country. The areas in which the EU is perceived to have the most significant impact as an international actor are the economy, trade, and fighting climate change. Experts in Indonesia expect the EU's influence and impact in the country to extend to the spheres of technology (including technology transfer to Indonesia) and education (in particular, as a basis for bilateral cooperation on technology). Expectations regarding EU-Indonesia cooperation relate to perceptions of EU global climate action and expectations of EU investment in the development of green technologies.

The share of article in the Indonesian press that report on the EU as a primary subject is low – around 3%. Thematically, leading Indonesian outlets focus on trade (CEPA negotiations), EU-Indonesian controversies over palm oil exports, EU sanctions against Myanmar and Russia, and the EU's response to the COVID-19 pandemic, including its actions outside the EU.

Experts and focus group participants see EU-Indonesia relations as one of the drivers of the country's development, but express the opinion that there is insufficient in Indonesia on the part of the EU. Perceptions of

the EU in Indonesia remain overshadowed by China, the USA and Japan –actors that have a longer and more consistent presence in the country as economic, political or development partners. Experts and focus group participants express concerns that the geographical distance between the EU and Indonesia may be an obstacle to strengthening bilateral relations.

Focus group participants welcome the EU's assistance in supporting minority rights in Indonesia, as well as in promoting secularism, and improving the local education system. However, certain aspects of EU norm-setting activity in Indonesia evoke mixed perceptions, with the EU being seen as unreasonably aggressive in its projection of norms in the country (in particular, criticism of death penalty).

Themes recommended for EU public diplomacy:

Education; technology (with a focus on digital technology); health; the environment and climate change (with a focus on agriculture); social and cultural issues (with a focus on human rights and gender equality).

Whom to involve from key audiences:

Government actors and members of parliament at national and provincial levels; interest groups; business communities at national and provincial levels; traditional media professionals; social media actors (influencers, YouTubers, vloggers); cultural personalities, representatives of ethnic/linguistic groups and other minority groups; youth organisations and members of academia.

4.7. Japan

Summary

Overall, the EU is perceived positively in Japan, and the level of public awareness and interest in the EU in the country is generally high, reflected in the number of articles mentioning the EU in major national newspapers. The EU's power and role are most widely recognised in the domains of economics and trade, as well as climate. Analyses of traditional and social media reveal that major EU Member States is usually more visible than the EU *per se*, not least in the domains of politics and culture (is the latter being one of the dominant Europe-related themes in the Japanese media). Interviews with stakeholders (policy practitioners, journalists, and experts), as well as the focus group meeting with university students, reveal that the more these groups get to know about the EU, the more they recognise its importance. These features do not appear to have changed substantially from the 2015 study. One of the new factors influencing perceptions of the EU in Japan concerns the COVID-19 pandemic. Japan has been paying particular attention to the way in which the EU and its Member States deal with the pandemic and the vaccination process, including vaccine exports from the EU to Japan. Climate change and regulations concerning artificial intelligence (AI) are also examples of new topics that are receiving greater attention and revealing certain differences in views between the EU and Japan.

Themes recommended for EU public diplomacy:

Foreign policy; research, science and technology; climate change; Japan's domestic politics.

Whom to involve from key audiences:

Academia; high schools; Japanese educational authorities; political parties; local diplomatic networks (MS General Consulates, Consulates or Honorary Consulates in certain cities such as Kyoto, Osaka, Nagoya, Fukuoka and Sapporo); business.

4.8. Mexico

Summary

Overall, the EU in Mexico is seen to be an actor of medium significance – mainly due to the perceived importance of the US. The visibility of the EU has slightly increased since 2015, however. Its normative influence is perceived positively, but internal EU crises have evoked negative images in Mexico. The areas in which the EU is seen to have the greatest impact are climate change and the economy; in particular, trade and investment. The areas in which the EU is expected to have the most impact are development, education and politics. The literature on perceptions of the EU in the country focuses on issues relating to the updated EU-Mexico agreement, and on the role of the EU as part of the diversification of Mexican foreign policy. The most visible aspects of the EU's image in the public opinion survey concern tourism and global trade. In the media analysis, the most visible areas are health, the economy and politics. Interviews and focus groups highlight a prevailing perception of the EU as a modern and efficient entity. The findings of this report and the 2015 study are similar with reference to positive perceptions of the EU as a normative actor, as well as negative perceptions that derive from the EU's internal crises.

Themes recommended for EU public diplomacy:

Environment and climate change; politics; human rights/freedom of expression; culture/education.

Environment and climate change

Whom to involve from key audiences:

EU Delegation; EEAS; Mexican Ministry of Environmental Affairs; Mexican Ministry of Energy; environmental NGOs; academia; think tanks; businesses; public and private investors; embassies of EU Member States; EU cultural institutes.

Economy and trade

Whom to involve from key audiences:

Trade section within the EU Delegation; mayors, local leaders and business communities; Mexican Ministry of the Economy; CANACINTRA; CONCAMIN; CONCANACO.

Politics

Whom to involve from key audiences:

Federal Electoral Institute; political parties; indigenous groups; EU Delegation; Mexicanos Contra la Corrupcion y la Impunidad; NGOs in Mexico and the European Union; Mexican Ministry of Foreign Affairs; Mexican Ministry of Defense/Peacekeeping Missions.

Human rights/freedom of expression

Whom to involve from key audiences:

Mexican and EU NGOs; Comisión Mexicana de Derechos Humanos; Centro de Derechos Humanos 'Fray Bartolomé de las Casas'; Centro de Derechos Humanos 'Fray Francisco de Vitoria O.P.' A.C.; Centro de Derechos Humanos Miguel Agustín Pro Juárez; Centro de Estudios Fronterizos y de Promoción de los Derechos Humanos A.C.; academia and universities; EU Member States' embassies and cultural institutes.

Culture/education

Whom to involve from key audiences:

EU Delegation and alumni; EU Delegation; Erasmus+ programme; EU Member States' international education agencies; practitioners from EU Delegations and Mexican universities.

4.9. Nigeria

Summary

Overall, the EU is perceived in Nigeria as an actor of significance. Its influence is perceived as mainly positive, particularly in the public opinion poll, while its influence received mixed reviews in the focus group and interviews. The areas in which the EU is perceived as having the greatest impact are: global trade; financial services; science and research; global health; tourism, and industrial development. The areas in which the EU is expected to have the most impact are: trade; stronger economic and political ties. The literature on the EU focuses on the EU's role in global trade – especially economic partnership agreements, which are seen as problematic for Nigeria; the EU's promotion of human rights and support for humanitarianism; as well as recent action to prevent the entry of African immigrants into Europe, and the role of the EU in promoting democracy. Based on survey findings, the most visible aspects of the EU's image are in relation to the economy, social development, politics and health. According to the media analysis, the main negative issues are the EU's slow COVID-19 vaccine roll-out and so-called 'vaccine apartheid', but there was also praise for the work of Team Europe in distributing PPE, as well as the EU's promotion of initiatives that prevent and tackle sexual and gender-based violence, with some focus on the support given to humanitarianism via regional organisations such as ECOWAS. The interviews and focus groups highlighted the negative impact of Brexit both on the idea of the EU as a stable regional polity, and on the model of regionalism. Furthermore, visibility of the EU and its initiatives was relatively low compared with other actors, including individual EU Member States. The negative reputation of the economic partnership agreements (EPAs) identified in the literature was mirrored in the focus groups, although interviewees recognised the EU's important role as a global economic actor. The EU is also respected for its promotion of human rights and support to democratic governance structures, and respondents were keen for it to carry out more humanitarian assistance.

Themes recommended for EU public diplomacy:

Environment/climate change; democracy and human rights; migration and mobility; health; the economy and trade.

Environment/climate change

Whom to involve from key audiences:

EU Delegation; EEAS; Nigerian Ministries of Energy, Environment and Agriculture; environmental NGOs; academia; think tanks; businesses; public and private investors; embassies of EU Member States; EU cultural institutes (Goethe-Institut, Alliance Française)

Democracy and human rights

Whom to involve from key audiences:

Nigerian Ministry of the Interior; EEAS; EUD, civil society groups (especially women's rights organisations); journalists; human rights activists (especially women's human rights defenders, LGBTQ+ groups and persons); youth; beneficiaries of projects under the European Instrument for Democracy and Human Rights.

Migration and mobility

Whom to involve from key audiences:

Nigerian Ministry of Education; Erasmus+ programme; Nigeria in Diaspora Commission (NIDCOM); research think tanks and academia; national government agencies responsible for immigration in EU Member States; European Commission.

Health

Whom to involve from key audiences:

UN Agencies, Bill and Melinda Gates Foundation; USID; health care professionals; Ministry of Health; Open Society of West Africa; NGOs (including local groups and transnational organisations such as Save the Children).

Economy and trade

Whom to involve from key audiences:

Trade section within the EU Delegation; business community, including small and medium-sized enterprises; commerce guilds; Nigerian Ministries of Labour and Productivity, Trade and Investment; trade unions; academics.

4.10. Republic of Korea

Summary

In 2021, perceptions of the EU in Republic of Korea have improved in comparison to 2015, despite multiple internal crises within the EU. In Republic of Korea, the EU is seen predominantly as an important trading partner, with EU-Republic of Korea FTA being regarded as a successful international treaty. Even so, in the eyes of the Republic of Korean public and elites, the EU lags behind the USA in all areas of international performance and bilateral relations. Brexit has had a negative impact on perceptions of the EU, laying the ground for suggestion that the EU's performance will be diminished without the UK. The COVID-19 pandemic has had a mixed impact on perceptions of the EU in Republic of Korea.

In 2021, the COVID-19 pandemic became the main focus of EU media coverage in Republic of Korea. The EU's troubled response to the pandemic has undermined perceptions of the EU's capabilities. At the same time, the success of Biontech-Pfizer cooperation in COVID-19 vaccine development, and the fact that many vaccine production sites are located in Europe, has slightly raised awareness of EU capabilities in the sphere of research and technology.

The area of EU performance that is most widely recognised by both society and experts in Republic of Korea is the economy and trade. However, EU performance in several other areas has the potential to gain greater recognition. The suggested areas for public diplomacy actions in Republic of Korea are climate change prevention; research, science and technology; education, and culture.

Themes recommended for EU public diplomacy:

Politics/normative; environment/climate change; education; culture; health.

Politics/normative

Whom to involve from key audiences:

Academia; NGOs; Republic of Korean Ministry of Unification.

Environment/Climate change

Whom to involve from key audiences:

Business; Republic of Korean Ministry of Environment; academia.

Education

Whom to involve from key audiences:

Academia (including students); Republic of Korean education authorities.

Culture

Whom to involve from key audiences:

Academia; fine arts associations; fine arts alumni societies.

Health

Whom to involve from key audiences:

Academia; business (medical research, vaccine productions).

4.11. Russia

Summary

Compared with 2015, the EU is more visible in Russia in 2021, but opinions of the of the bloc have deteriorated. The experts estimate the current state of bilateral relations between the EU and Russia as confrontational, with no possibility of significant improvement in the short to mid term. The literature points to the Ukraine crisis of 2014 as a turning point in EU-Russian relations, with confrontation growing further due to the EU's sanctions against Russia (as in 2015), the debates over Nord Stream-2 and the cases of the Sergei Skripal and Alexei Navalny. In the literature, images of the EU as an actor in the economic issue area often overlap with the political issue area. The experts in Russia express the view that the 'new' EU Member States (Poland and the three Baltic States) act as spoilers of EU-Russian relations (a new feature). Russian media coverage of the EU features a more negative emotional charge, and includes issues such as EU foreign policy, human rights, health, the environment – and specifically, sanctions against Russia. The EU is also visible in news about COVID-19 vaccines certification and EU green energy/climate policies (and the Green Deal in particular). The media are neutral or positive when reporting matters other than EU-Russian political relations. On political and normative issues, the press and some experts present the EU as arrogant, applying double standards by ignoring its own faults. The EU's image in the media is of a hostile yet weak and condescending actor. Educated youth present mixed views of the EU, acknowledging its performance in terms of overall quality of life and social policies, but pointing to the economic gaps and differences in social values between 'old' and 'new' Member States (a new feature since 2015). In the eyes of the Russian public, the EU is a positive and important actor. The public pays tribute to the EU for fighting climate change and protecting the environment, and ascribes importance to the EU in global human rights on a par with the UN and Russia – a new development since 2015, when Russia led.

Themes recommended for EU public diplomacy:

Environment/climate change; research, science and technology; education; health; social; culture

Whom to involve from key audiences:

Diplomatic representations of EU Member States in Russia; Moscow State Institute of International Relations of the Ministry of Foreign relations (MGIMO); Institute of World Economy and International Relations (IMEMO) and the Institute of Europe – both of the Russian Academy of Science; the Gorchakov Foundation (pro-government); Russian International Affairs Council (RIAC); the Valdai Discussion club; Russian Trade and Commerce Chamber; Memorial (watchdog); *Nezavisimaya gazeta* (independent newspaper); the EUREN network; EU info centres; local authorities (in regions bordering the EU).

4.12. South Africa

Summary

The 2021 Update Study confirms that the norm-setting influence of the EU in South Africa centres on economics and politics, with the near-universal perception of the EU as a trade power. History continues to be an important factor in forming perceptions of the EU in South Africa. Historical tensions and the legacies of colonialism and apartheid influence perceptions of Europe, and by extension the EU, in the eyes of South African respondents. Nevertheless, perceptions of the EU as an economic power dominate.

Shifts in the geopolitical landscape that have occurred between 2015 and 2021 have resulted in a more assertive China and a politically divided US, which places a new focus in South Africa on the EU as a moderating power.

The COVID-19 pandemic has played something of a paradoxical role with regard to perceptions of the EU in South Africa: it has at once heightened the EU's visibility and the frequency of articles in the South African press, but mostly for the 'wrong' reasons.

Themes for EU public diplomacy:

Normative/development; social issues/youth

Normative/development

Whom to involve from key audiences:

Partners for Possibility, LifeCo (social enterprises); South African Organic Sector Organisation; National Small Business Chamber.

Social/youth

Whom to involve:

South African Institute of International Affairs, ACCORD (think tank); European Commission (Erasmus+ programme); European Studies Association of South Africa (students' association).

4.13. United States

Summary

Overall, the EU is perceived in the US as an actor of high but slightly decreasing significance. Its influence is considered positive, although this varies between themes, and depends on political affiliation. The literature review finds a trend over the past five years towards negative perceptions of the EU, mainly due to the approach of the Trump administration – albeit there are indications that the more engaged perspective of the Biden Administration may revert this and thus improve perceptions. The areas in which the EU is seen as having the greatest impact are the economy and the environment. Literature regarding US perceptions of the EU over the last five years highlights the EU's role in the economy and external relations. According to the survey, the most visible aspects of the EU's image are politics, the economy and health, while traditional and social media in the US focus on the EU in the context of health (the pandemic) as the leading issue, followed by the economy and politics. Experts and focus group participants identify the areas of climate change, development, digital and business regulation, as well as technology, to be areas of EU leadership.

Themes recommended for EU public diplomacy:

Climate and the environment; politics/normative; research, science and technology; culture.

Climate and the environment

Whom to involve from key audiences:

EU Commission; EU Delegation; US Government; ministries (working-level); progressive politicians and influencers that share a Green Deal narrative; US states (such as California); cities, including mayors' offices; CSOs; NGOs; philanthropies; businesses in the renewables sector; the private sector, including private investment banks; climate and environmental start-ups; UNSG office and UNFCCC; the Climate Leadership Council; potentially working with conservative or bipartisan environmental groups; embassies of EU Member State; climate advocates.

Politics/normative

Whom to involve from key audiences:

European Parliament; Council of the EU; European Commission; national military sectors; Centre for Strategic and International Studies; Hudson Institute; Foreign Policy in Focus; Centre for American Progress; Brookings Institute, CATO Institute; Natural Resources Defense Council (NRDC); Greenpeace; World Wildlife Fund for Natur (WWF); Union of Concerned Scientists (UCS); American Youth Policy Forum; UrbEd.

Research, science and technology

Whom to involve from key audiences:

European Parliament; US Congress; European Commission; European-American Chamber of Commerce; big tech companies and start-ups in various regional hubs across the US and the EU; SMEs that may benefit from new regulations; advocacy groups for digital rights; influencers; embassies of EU Member States; National Business Association (NBA); National Small Business Association (NSBA); Women's Business Development Center (WBDC); Minority Chamber of Commerce.

Culture

Whom to involve from key audiences:

European Commission; EEAS; EU Member States' cultural institutes; European Union National Institutes of Culture (EUNIC); Smithsonian Institution; Goethe-Institut network in various cities; Società Dante Aligheri; and Alliance Française; National Trust for Historic Preservation; World Heritage US; schools and universities; museums and heritage trusts; influencers in music, art, literature and other cultural areas; chambers of commerce; Hollywood stakeholders, including producers and celebrities.

Update of the 2015 Perception Study

Volume I

UPDATE OF THE 2015 PERCEPTION STUDY

FINAL REPORT

VOLUME I

15 November 2021

The study was requested by the European Commission's Service for Foreign Policy Instruments (FPI). The implementation of the study started on 4 January 2021. The consortium is led by B&S Europe, the assignment implemented by the team of PPMI (the sub-contractor) in close cooperation with experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC).

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List of abbreviations

CEPA - Comprehensive Economic Partnership Agreement

CETA - EU-Canada Comprehensive Economic and Trade Agreement

CUSMA - Canada-US-Mexico Agreement

ECB - European Central Bank

EEAS – European External Action Service

EMA - European Medicines Agency

EPA - Economic Partnership Agreement

EUPOP - EU Policy Outreach Partnership

FTA – Free Trade Agreement

G7 – an inter-governmental political forum consisting of Canada, France, Germany, Italy, Japan, the United Kingdom and the United States

MERCUSOR - Southern Common Market

NDCs - Nationally Determined Contributions

SDGs - UN Sustainable Development Goals

UNFCCC-- United Nations Framework Convention on Climate Change

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Introduction

1.1. Structure of the Update Study

The Update Study 2021 is an **in-depth, multi-method analysis of the perceptions of the EU and Europe in 13 of the EU's key partners** – 10 Strategic Partner countries that were included in the 2015 Baseline Study:⁷ Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, Republic of Korea and the US – as well as three additional countries: Colombia, Indonesia and Nigeria. The Update Study aims to contribute in a number of ways to EU public diplomacy: 1) it undertakes a systematic **listening exercise**; 2) it analyses the reception of the EU's messages and thematic projections factoring local conditions and evolving realities; and 3) it develops recommendations to fine-tune dialogue and engagement with and by the EU globally. The Update Study is *not* an evaluation of EU public diplomacy actions.

The **main body of the report** consists of:

- **Executive summary**, shortly explaining the main findings of study. The executive summary presents the analytical framework of the Update Study, as well as a general and task-specific methodological overview, main findings on the key research criteria, aggregated policy recommendations and a summary overview of the country-level recommendations;
- **Volume I**, presenting the analytical framework, as well as a general and task-specific methodological overview of the Study Volume I synthesises the analysis from all methods employed in this Study and presents the general findings and trends by themes. It presents cross-thematic insights focusing on (1) the differences in perceptions of the EU vis-à-vis Europe and (2) the evolution of the perceptions of the EU since the 2015 Baseline Study. It highlights the key target audiences for EU public diplomacy and analyses partner organisations, summarises change in indicators over time and provides aggregated policy recommendations for EU public diplomacy;
- **Volume II** presents the country case studies for 13 target countries. The country case studies integrate all the gathered data for a particular country and contain findings on visibility, actorness and local resonance, and local conditions to explain EU perceptions. Each country chapter contains sections on continuity and change and country-specific recommendations.

Findings by methods are presented in five task-specific annexes: **Annex I**: Literature Review; **Annex II**: Comparative public opinion survey report; **Annex III**: Comparative traditional media report; **Annex IV**: Comparative social media report; **Annex V**: Comparative focus group report.

Reference materials summarise the primary data collected in the course of this study and the list of study support activities. The reference materials include: **13 country-indicator databases** that contain updated indicators showing the difference between the 2015 and 2021; **Annex VI**: List of webinars and trainings; and **Annex VII**: List of partner organisations for 13 countries.

⁷ More information on the study 'Analysis of the perception of the EU and EU's policies abroad', is available here: https://ec.europa.eu/fpi/analysis-perception-eu-and-eus-policies-abroad_en.

1.2. Understanding perceptions

Perceptions, and the images that are derived from them, represent mental pictures formed on the basis of an actor's accumulated, experience-based knowledge about the surrounding world and their beliefs about desirable behaviour.⁸ By extension, the effects of images and perceptions – of 'other' and of 'self' – are among the most powerful in foreign policy decision making. Decades of relevant research have proved that cognitive constructs concerning international relations and foreign policy actors, events and interactions have long-term effects on policy makers and opinion leaders.⁹ The literature has also established that *cognitive* image elements are accompanied by particular *affective* connotations and *normative* judgements. This complex construct of perceptions and images serves as a two-pronged filter to process incoming situational information: 1) it "may help... policy makers organise their cognitions about the world" – but at the same time, 2) it "may distort reality and negatively affect their decision making".¹⁰ In either scenario, images of 'self' and 'others', and of a given situation, introduce two types of predispositions into an actor's decision making: they assist with the diagnosis of the situation, and they identify choices for subsequent actions. These lead the actor to favour certain types of actions.¹¹ As such, perceptions, and the images that are associated with them, serve as 'road maps' and 'focal points' that also inform external observers how to define a certain situation, and offer them clues as to how to relate to their environment.¹²

Following the latest theorisation of external perceptions of the EU, perceptions and images in foreign policy contexts are "critical in understanding the complex relations between the projection and reception of power on the global stage; dissecting and predicting influences on IR behaviour and foreign policy roles; specifically in warranting a degree of stability when conflicts occur; and finally, ensuring effective and respectful diplomatic dialogue so as to avoid the trap of self-centred positions".¹³ Focusing on external perceptions of the EU may contribute to the debate on EU actorness,¹⁴ and upon its recognition (which is one of the components of actorness, as highlighted by Jupille and Caporaso.¹⁵ EU actorness is "intimately linked to how external actors perceive the EU: is it for example deemed to be an actor on par with states, and therefore welcomed as a member of certain international organizations, or is it accorded a lower status?".¹⁶ It also allows us to explore whether

⁸ Vertzberger, Y. (1990). *The world in their minds: Information processing, cognition, and perception in foreign policy decisionmaking*. Stanford, CA: Stanford University Press, 114-127.

⁹ Cottam, R. W. (1977). *Foreign policy motivation: A general theory and a case study*. Pittsburgh: University of Pittsburgh Press; Holsti, K. (1970), 'National role conceptions in the study of foreign policy', *International Studies Quarterly*, 14(3), 233–309; Herrmann, R. K. (1985). American perceptions of Soviet foreign policy: Reconsidering three competing perspectives. *Political Psychology*, 375-411; Herrmann, R. K. (2013). Perceptions and image theory in international relations. In L. Huddy, D. O. Sears, & J. S. Levy (Eds.), *The Oxford handbook of political psychology* (pp. 334–363). Oxford University Press; Cottam, M. (1986). *Foreign policy decision making*, Boulder, CO: Westview Press; George, A. L. (1980). *Presidential decisionmaking in foreign policy: The effective use of information and advice*. Westview Press; Larson, D. W. (1985). *Origins of containment: A psychological explanation*. Princeton: Princeton University Press; Schafer, M. (1997). Images and policy preferences. *Political Psychology*, 18(4), 813-829; Alexander, M. G., Levin, S., & Henry, P. J. (2005). Image theory, social identity, and social dominance: Structural characteristics and individual motives underlying international images. *Political Psychology*, 26(1), 27-45; Miskimmon, A., B. O'Loughlin and L. Roselle (2013). *Strategic Narratives: Communication Power and the New World Order*. Oxon and New York: Routledge.

¹⁰ Schafer (1997). op. cit., 814.

¹¹ Cottam, M. (1992). Contending dramas in American foreign policy. In M. Cottam & C. Shih (Eds.), *Contending dramas: A cognitive approach to international organizations* (pp. 75–100). New York: Praeger.

¹² Goldstein, J. S., & Keohane, R. O. (Eds.). (1993). *Ideas and foreign policy: beliefs, institutions, and political change*. Ithaca and London: Cornell University Press, pp. 3-30.

¹³ Chaban, N., & Elgström, O. (2021). *The Ukraine Crisis and EU Foreign Policy Roles: Images of the EU in the Context of EU–Ukraine Relations*. Cheltenham, UK/Northampton, US: Edward Elgar Publishing, 267.

¹⁴ Drieskens, E. (2021) Actorness and the Study of the EU's External Action, In S. Gstöhl and M. Schunz (eds.) *The External Action of the European Union: Concepts, Approaches, Theories* (pp.19-31). London: Palgrave Macmillan.

¹⁵ Jupille, J. and J.A. Caporaso (1998), 'States, agency, and rules: The European Union in global environmental politics', in C. Rhodes (ed.), *The European Union in the World Community*, Boulder, CO: Lynne Rienner, pp. 213–29.

¹⁶ Chaban, N., & Elgström, O. (2021), op.cit.

the EU's own identity as a normative power or market power is perceived as such by other actors. Importantly, a systematic insight into external perceptions of the EU also helps us to understand and explain the effectiveness of the EU's external actions,¹⁷ including EU public diplomacy. Meanwhile, being informed by an 'outside-in' perceptions,¹⁸ such an approach helps us to avoid falling into the trap of a Euro-centric approach to the EU's foreign policy.¹⁹

This Final Report tracks and maps perceptions of the EU among 13 key global partners in 2021, producing insights into external images and framings of the EU as a powerful partner – and one that is potentially beneficial to third countries – as well as a global actor with a distinct cultural and political status. The report also discusses the EU's perceived policies, as well as its legitimacy, credibility and coherence. It examines the perceptions of 'outsiders' regarding how closely the EU's words match its deeds, and whether or not they recognise the EU as consistently following its principles. The findings of the 2021 Study are systematically compared with those of the 2015 Baseline Study. Patterns discovered in the continuity and changes in perceptions add to the debate surrounding the EU as a global actor, and how it can adopt a more comprehensive and strategic approach in its external actions, including in innovative and effective public diplomacy.

1.3. EU public diplomacy

As EU public diplomacy enters the third decade of the 21st century, this report defines it as an example of '**new** public diplomacy' – that is, a set of "instruments used by states, associations of states, and some sub-state and non-state actors, to understand cultures, attitudes, and behaviour; build and manage relationships; and influence thoughts and mobilize actions to advance their interests and values".²⁰ Some conceptualise public diplomacy to be about dialogue as the basis for expertise and knowledge to emerge, with the main focus on discourse and mutual understanding²¹ (the *relational* approach). In a different understanding, public diplomacy also concerns the way a government or society projects itself to external audiences in ways that improve perceptions of that society in the minds of foreign publics²² (the *information* approach). The Update Study 2021 inherits this conceptual ambiguity and addresses perceptions of the EU in both approaches in its design and in policy recommendations. This report thus examines the perceptions of international publics regarding the EU – a supranational body and one of the most advanced regional integration projects in the world; a foreign policy actor promoting multilateralism, democracy, human rights, peace and international development globally, as well as combating environmental degradation and climate change. Cooperation, integration, the rule of law and a common market are distinct features of its internal policies.

¹⁷ Elgström, O., & Chaban, N. (2015). Studying external perceptions of the EU: Conceptual and methodological approaches. In *Perceptions of the EU in Eastern Europe and Sub-Saharan Africa* (pp. 17-33). Palgrave Macmillan, London.

¹⁸ Keuleers, F., Fonck, D., & Keukeleire, S. (2016). Beyond EU navel-gazing: Taking stock of EU-centrism in the analysis of EU foreign policy. *Cooperation and Conflict*, 51(3), 345-364; Keukeleire, S., & Lecocq, S. (2021). Decentring European Foreign Policy Analysis. In S. Gstöhl and M. Schunz (eds.) *The External Action of the European Union: Concepts, Approaches, Theories* (pp. 297-312). London: Palgrave Macmillan.

¹⁹ Manners, I. (2002). Normative power Europe: a contradiction in terms?. *JCMS: Journal of common market studies*, 40(2), 235-258; Manners, I. (2021). Normative Power Approach to European Union External Action. In S. Gstöhl and M. Schunz (eds.) *The External Action of the European Union: Concepts, Approaches, Theories* (pp. 61-76). Palgrave Macmillan; Damro, C. (2012). Market power Europe. *Journal of European Public Policy*, 19(5), 682-699; Damro, C. (2021) The European Union as 'Market Power Europe', In S. Gstöhl and M. Schunz (eds.) *The External Action of the European Union: Concepts, Approaches, Theories* (pp. 46-60). London: Palgrave Macmillan.

²⁰ Gregory, B. (2015). Mapping Boundaries in Diplomacy's Public Dimension. *The Hague Journal of Diplomacy*, 11(1), 8.

²¹ Gregory, B. (2008). 'Public diplomacy: Sunrise of an academic field', *The ANNALS of the American Academy of Political and Social Science*, 616(1), 274-91; Snow, N. (2009). 'Rethinking public diplomacy', in N. Snow & P.M. Taylor, *Routledge Handbook of Public Diplomacy* (3-11). NY and Milton Park: Routledge; Zaharna, R.S. (2009). 'Mapping out a Spectrum of Public Diplomacy Initiatives: Information and Relational Communication Frameworks', In N. Snow & P.M. Taylor, *Routledge Handbook of Public Diplomacy* (86-100). NY and Milton Park: Routledge.

²² Davis Cross, M. and J. Melissen (eds) (2013). *European Public Diplomacy: Soft Power at Work*. New York, NY: Palgrave Macmillan.

Understanding this complex perception ‘puzzle’ requires us to understand and examine the history behind the development of EU public diplomacy efforts. In addition, we explore the institutional architecture behind the projection of external perceptions, as well as the complex global environment within which it acts. The Update Study is clear that EU public diplomacy actions and strategic communication are not the only inputs into external perceptions of the EU. The Update Study tracks a set of inputs in action, as perceptions is a complex phenomenon shaped by a combination of *location-, region-, EU- and global-specific* factors.

EU public diplomacy in the 21st century takes place in an international arena whose poles are multiplying. Multilateralism is being challenged, geopolitical rivalry is increasing, and norms and values are being contested. There has been a proliferation of producers of diplomatic outcomes at state and non-state levels, and within the new media ecology.²³ EU public diplomacy must react to ongoing globalisation, technological change, the threat of environmental and climate catastrophe – and, since 2020, a global pandemic that has shut down the world and curtailed people-to-people contacts. In response to this changing world, and as an agent of ‘new’ public diplomacy, the EU is increasingly characterised by “leaving the traditional zone of diplomatic work and entering two-way communication and direct engagement not only with foreign governments, but also with other foreign audiences directly and/or via nongovernmental partners”.²⁴ In its public diplomacy conceptualisations and practice (see the overview of EU public diplomacy initiatives between 2015 and 2021 in Annex I, the literature review), the EU’s public diplomacy headquarters, as well as EU Delegations to third countries, factor in “evolving models of public-private collaboration and communicative behaviours in the increasingly distributed system of states and global society”.²⁵ Such elements include, but are not limited to, the proliferation of stakeholders keen to participate as agents in communications and actions on the international stage; heightening competition between many assertive international actors for global ‘soft power’ influence; increased familiarity with key communication principles and techniques, including dealing with the “challenge to the communication order associated with the rise of fake news, disinformation, paid trolls and bots”.²⁶ These have been accompanied by a rapid increase in the digitalisation of diplomatic practice (fast-forwarded by the COVID-19 pandemic), which is still in search of “genuine relationship-based examples” and “real interconnection”.²⁷

The Lisbon Treaty of 2011 brought three major innovations: the establishment of the European External Action Service (EEAS); the conversion of the European Commission Delegations around the world into European Union Delegations, with the status of fully-fledged embassies; and the creation of the office of the High Representative (HR) of the EU. All three have provided novel inputs into the public diplomacy of the EU over the last decade. Since its creation in 2010, the EEAS has been the main EU institution in charge of communicating and coordinating EU public diplomacy. This began in coordination with the Commission and those Directorates-General with an external mandate, and soon after with the Service for Foreign Policy Instruments (FPI) of the European Commission. One of the objectives for establishing the EEAS was to “integrate the public diplomacy messages of EU member states into one unified message – that is, to speak to the world with one

²³ Hoskins, A., & O’Loughlin, B. (2010). *War and media: The emergence of diffused war*. Cambridge: Polity.

²⁴ Jelisić, J. (2012) ‘Developing Public Diplomacy for Supporting EU Accession: Lessons to Be Learned at the Western Balkans’, in M. Andrić and A. Gustović-Ercegovac (eds.), *The 13th CEI Dubrovnik Diplomatic Forum Strategic Public Diplomacy, Diplomatic Academy Proceedings*. 9, 33–54; Fitzpatrick, K. (2007). Advancing the new public diplomacy: A public relations perspective. *The Hague Journal of Diplomacy*, 2(3), 187–211.

²⁵ Melissen, J. & J. Wang (2019) Introduction: Debating Public Diplomacy. *The Hague Journal of Diplomacy*, 14(1-2), 2.

²⁶ Cull, N. J. (2019). The Tightrope to Tomorrow: Reputational Security, Collective Vision and the Future of Public Diplomacy. *The Hague Journal of Diplomacy*, 14(1-2), 23.

²⁷ *Ibid.*

voice”.²⁸ The role of EU Delegations, meanwhile, is to represent “all of the EU’s interests overseas”.²⁹ Art. 32 of the Lisbon Treaty “tasked diplomatic missions of EU member states and EU delegations in third countries and at international organisations with cooperating and contributing to the formulation and implementation of a common EU approach”.³⁰ EU Delegations therefore not only received new political tasks, but they were also “put in the driving seat to coordinate European cooperation outside of EU borders with and between member states”.³¹ Within this complex institutional architecture, EU Delegations became central to the implementation of EU public diplomacy abroad – not only through the distribution of information about the EU, but also by promoting EU narratives and success stories.³² To achieve effective public diplomacy in a rapidly changing world, the EU aims to follow the core ‘listening’ principle – namely, that “global public engagement must begin with listening: systematically collecting and analysing the opinions of foreign public”.³³ Thus, the EU takes account of its existing and evolving external perceptions in a systematic manner (see the 2015 Baseline Study of perceptions of the EU in 10 countries, as well as the Update Study 2021 in 13 countries, presented in this Report).

Post-Lisbon, EU public diplomacy has ceased to be a ‘Cinderella’ within EU policy making – a somewhat overlooked policy area with limited resources, but great potential.³⁴ In pursuing this dynamic, the EU is following a broader global trend: public diplomacy is “becoming a more rather than less relevant component of diplomacy”.³⁵ The importance of public diplomacy to the EU’s foreign policy was acknowledged by the creation of the Partnership Instrument for cooperation with third countries in 2014. This instrument sought to promote “widespread understanding and visibility of the Union and of its role on the world scene by means of Public Diplomacy, people-to-people contacts, cooperation in educational and academic matters, think tank cooperation and outreach activities to promote the Union’s values and interests” (Regulation (EU) No 234/2014, Article 1.2(d)). The importance of public diplomacy and its potential for strategic communication by the EU, to and in a changing world, is recognised in the EU’s guiding foreign policy document, the EU Global Strategy of 2016:

The EU will enhance its strategic communications, investing in and joining up public diplomacy across different fields, in order to connect EU foreign policy with citizens and better communicate it to our partners. We will improve the consistency and speed of messaging on our principles and actions. We will also offer rapid, factual rebuttals of disinformation. We will continue fostering an open and inquiring media environment within and beyond the EU, also working with local players and through social media (online).

Despite such progress, Duke (2013) identifies a core challenge for EU public diplomacy post-Lisbon – the conflict between the internal and external narratives on EU public diplomacy in a world in which “information sharing ... is gradually moving from a facts-based approach to a narrative, case-study approach”.³⁶ The EU’s

²⁸ Samei, M. F. A. (2015). The European Union’s Public Diplomacy towards the Arab Spring: The Case of Egypt. *The Hague Journal of Diplomacy*, 10(2), 122.

²⁹ Duke, S. and A. Courtier (2011). The EU’s External Public Diplomacy and the EEAS: Cosmetic Exercise or Intended Change?, *The Diplomatic System of the European Union (DSEU)*, no. 7 (November 2011), available online at http://dseu.lboro.ac.uk/Documents/Policy_Papers/DSEU_Policy_Paper07.pdf (retrieved 20 November 2014).

³⁰ Bicchi, F. & H. Maurer (2018). Introduction: European Cooperation Abroad: European Diplomatic Cooperation Outside EU Borders. *The Hague Journal of Diplomacy*, 13(1), 1.

³¹ *Ibid.*, 2.

³² Rasmussen (2009). Discourse Analysis of EU Public Diplomacy Messages and Practices.

³³ Cull., *op. cit.*, 25.

³⁴ Whitman, R. (2005). ‘Winning Hearts and Minds for Europe’. In R. Youngs ed. *GLOBAL EUROPE Report 2: New Terms of Engagement*, London: Foreign Policy Centre/British Council/European Commission, 2005), 30–37.

³⁵ Melissen and Wang. *Op. cit.*, 2.

³⁶ Davis Cross and La Porte. *Op. cit.*, 266; Duke, S. (2013) The European External Action Service and Public Diplomacy. In: Cross M.K.D., Melissen J. (eds) *European Public Diplomacy. Palgrave Macmillan Series in Global Public Diplomacy*. Palgrave Macmillan, New York.

internal narrative is an ongoing process – “lacking *finalité*”, and compounded by a “broader post–Cold War existential crisis about who and what the EU is on the global stage”, as well as by the “imprecise nature of the EU’s overall *actorness* or, ... the type of actor the EU wishes to become on the international stage”.³⁷ The EU’s internal narrative is also still marked by competition between the EU with its Member States, which typically view public diplomacy as part of their own national diplomatic efforts, and may overlook the benefits of contributing to broader EU public diplomacy.³⁸ The questions identified by earlier works³⁹ also still remain, namely: what should be communicated? And how can this communication be coordinated in order to send a coherent message across borders? As such, “despite significant integrative steps since the end of the Cold War”, the EU “still struggles to offer a coherent narrative – both internally and externally, thus potentially hampering the EU’s strategic impact”.⁴⁰ Having said this, the EU Global Strategy (2016) clearly identifies three narrative lines that guide the EU’s foreign policy: resilience, principled pragmatism and multilateral global governance. In an earlier strategic communication – a joint handbook for EU Delegations, issued in December 2012 by the EEAS Strategic Communication Division and the Communication and Transparency Unit of the then-Directorate-General for Development and Cooperation – EU Delegations are directed that they are “supposed to focus their messages and actions on promoting five aspects of the EU, namely the EU as: a major partner in democratic transition; the world’s biggest cooperation and development donor; a global economic power; a global security provider; and a human rights’ defender” (online).

This Final Report is informed by the need for a powerful, coherent narrative regarding EU public diplomacy. Specifically, this is required: (1) as a tool to strengthen the “image resilience of the EU”⁴¹ to counteract the impact on the EU of multiple crises over the last decade; and (2) to stress the positive and attractive values of the EU in the eyes of key external audiences – a critical need in a world that faces an unprecedented global pandemic and an impending environmental and climate-related catastrophe. The Update Study 2021 tracks perceptions and images of the EU in 13 key countries, and assesses their potential contribution to the projection and reception of the narrative of the EU as a capable, resilient actor ready to reorganise and adapt in the face of crises, as well as being a trustworthy, beneficial partner and a credible and effective international leader whose actions resonate with local priorities, and which demonstrates an understanding of and willingness to listen to local norms and culture, and has the ability to communicate effectively using a range of media channels. Equally important, the Update Study 2021 identifies perceptions of the EU and tracks their evolution – the main objective of this project – to facilitate a genuine respectful dialogue and mutually-beneficially collaboration featuring shared leadership between the EU and its key global partners.

³⁷ Duke., op. cit., 2.

³⁸ Duke., op. cit., 2.

³⁹ Henrikson, A. K. (2006). *What Can Public Diplomacy Achieve?*. Netherlands Institute of International Relations' Clingendael'.

⁴⁰ Miskimmon, A. (2017). Strategic narratives of EU foreign policy and the European Neighbourhood Policy. In *The Routledge Handbook on the European Neighbourhood Policy* (pp. 153-166). Routledge, 85-86.

⁴¹ Davis Cross and La Porte. Op. cit.

Analytical framework and methodological overview

2.1. Analytical framework

The Update Study design mirrors the methodology developed and deployed in the 2015 Baseline Study. In particular, the presentation of the results follows the logic of the key indicators to ensure comparability with the Baseline Study. At the same time, we have added a number of improvements to take into account the new requirements of the Study's Terms of Reference, as well as changes in the policy context, lessons learned, and new possibilities enabled by technological advances in relevant data collection and analysis tools. Table 7 below describes the key research criteria for this Study.

2.1.1. Key research criteria

TABLE 7. KEY RESEARCH CRITERIA

CRITERIA	DESCRIPTION	MEASUREMENT SCALE ⁴²
Visibility	Measures the extent to which the EU/Europe is visible (awareness), and how this visibility is perceived. Visibility is measured in relation to specific themes and research groups. It is also measured in relation to the profile of the thematic frames and EU actors, as well as evaluations and sentiments regarding them in media coverage.	<ul style="list-style-type: none"> • Visibility ranges from weak to strong. • Evaluation/sentiment ranges from negative to positive.
Effectiveness	Separate from but connected to visibility, effectiveness is the extent to which the EU is perceived as successful/unsuccessful in achieving its intended goals.	<ul style="list-style-type: none"> • Ranges from low to high.
Actorness	Measures, on the one hand, whether the EU/Europe is perceived as active and, on the other hand, whether its actions are perceived as cohesive or non-cohesive.	<ul style="list-style-type: none"> • Ranges from inactive to active. • Ranges from non-cohesive to cohesive.
Normative power/norm-setter /soft power /collaborative public diplomacy actor/geopolitical power	<p>Horizontal/penetrating dimension: similar to actorness but does not focus on how the EU is perceived as an actor/non-actor, but for what particular action and as what <i>kind</i> of actor. It builds on the extensive literature on the EU as a normative power, a soft power and a public diplomacy actor.</p> <ul style="list-style-type: none"> • Soft power is the power of persuasion and appeal, and the key to effective public diplomacy. • The collaborative model of public diplomacy builds on successful communication and dialogue and the factors of mutual respect and joint goals. • It further focuses on the EU as a geopolitical power and how this relates to perceptions of the EU as a soft power, whether they are constitutive or exclusive. 	<ul style="list-style-type: none"> • Ranges from weak to strong. • Ranges from ineffective to effective.

⁴² The suggested measurement scale is included to illustrate the extent to which the variable in question is manifested in each theme.

Local cognitive resonance	Also referred to as the ‘local hook’/‘domesticity’ – the extent to which perceptions of Europe/the EU (thematically or otherwise) differ when the Europe/the EU is portrayed as acting for itself vs. acting <i>vis-à-vis</i> a specific third country, its neighbouring region or globally.	<ul style="list-style-type: none"> • Ranges from local (third country-specific), to regional, to EU-specific, to global.
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Source: Prepared by the Core Team.

2.2. Groups of research participants selected

Next, we present the **groups of key audiences** analysed in this Update Study (Table 8). We also explain the types of stakeholders we approached for interviews and focus groups. Each group allows for the incorporation both of individuals who have had substantial interaction with the EU, or very little – although none of the cohorts are, by definition, unaware of the EU. We are particularly interested in *how* and *in relation to what issues/contexts* the different groups perceive the EU (if at all). This approach allows us to capture the perceptions of individuals not involved with the EU, and whose perceptions cannot be captured through media and social media data analysis.⁴³ The quotas used to build the samples for the public opinion polls ensures the reflection of diverse general populations, and allows us to analyse perceptions of the EU according to location-specific demographic characteristics.

TABLE 8. GROUPS OF RESEARCH PARTICIPANTS SELECTED

METHOD	GROUP	WE APPROACHED:
Approached via individual interviews	Policy makers	<ul style="list-style-type: none"> • Key policy-makers from various political parties in national parliaments; • Members of parliaments who belong to legislative groupings (committees, commissions, etc.) dealing with international/EU issues.
	Government officials	<ul style="list-style-type: none"> • Government officials from desks dealing with the EU and the EU key partner countries (for comparative purposes); • Key ministries (e.g. finance, agriculture, trade, industry, development, environment/climate change, etc.) that have working relationships with Europe/the EU.
	Media	<ul style="list-style-type: none"> • Editors, editors-in-chief of domestic and international sections; • Leading journalists writing on international politics and specifically Europe/the EU in the press; • Writers for popular news internet portals, news directors from TV stations, etc.
	Opinion-makers	<ul style="list-style-type: none"> • Civil society leaders, political and economic commentators, influential bloggers and any other persons who have a significant impact in shaping the public opinion, especially in areas relating to Europe and the EU.
	Business community	<ul style="list-style-type: none"> • Leading importers, exporters; • Various business associations such as Chambers of Commerce, National Business Round Tables and similar.

⁴³ Following the methodology established in 2015, media and social media data were gathered using keywords relating to the EU/Europe: the qualitative media analysis focused on media coverage of the EU, while the quantitative media analysis focused on media coverage of both the EU and of Europe. In the case of the social media analysis, the visibility of both the EU and Europe were analysed using quantitative methods. Qualitative social media analysis focused on the coverage of Europe and the EU during three events: Europe Day celebrations, the G7 Summit, and European Council Summit – all of which took place in 2021.

	NGOs and civil society organisations	<ul style="list-style-type: none"> • Various NGOs, think tanks, cultural institutions, members of civil society organisations, which have at least some dealings with Europe or the EU
Approached through focus groups	Youth	<ul style="list-style-type: none"> • University students (typically in the final year of an undergraduate degree/first year of a post-graduate degree) of international relations/political science/EU studies/diplomacy/media and communication/environment/artificial intelligence (AI)/gender studies, etc.
Approached through public opinion polls	General population	<ul style="list-style-type: none"> • This group is constituted by members of the general public in the selected countries.

Source: Prepared by the Core Team.

2.3. Main themes and sub-themes

Below, we present the **list of the main themes and sub-themes to represent issue areas in relation to perceptions of the EU** in all 13 countries, its region and in the wider world (Table 9).

TABLE 9. MAIN THEMES

MAIN THEME	SUB-THEMES
Economy and trade	<ul style="list-style-type: none"> • Green growth and green recovery • Finance and fintech • Investment • EU taxonomy • Trade and trade deals • Agriculture and food • Industry • Sustainable and circular economy • Digital economy • Euro debt crisis • EU internal trade
Political issues	<p>External to the EU</p> <ul style="list-style-type: none"> • Security (peace and stability, right to protect, non-proliferation, counter-piracy, counter-terrorism, peacekeeping) • Other security threats (climate change, biological and chemical threats, environmental disasters, health threats) • Conflict resolution and mediation • Foreign policy (the Neighbourhood Policy, the EU Global Strategy, EU Delegations, the EEAS, public diplomacy) • Geopolitical weight (power to shape the world stage) • Effective multilateralism (intergovernmental affairs) • Human rights (governance, democracy) • Mass migration and refugees • Model/example/reference for regional integration • Paris Agreement and international climate governance • Bridging external and internal policy work ('Geopolitical Commission')
Normative	<ul style="list-style-type: none"> • Peace • Liberty • Democracy • Rule of law

	<ul style="list-style-type: none"> • Human rights • Social solidarity • Anti-discrimination • Sustainable development • Good governance
Environment and climate change	<ul style="list-style-type: none"> • Climate change, climate law and net-zero target by 2050 • Nationally Determined Contributions (NDCs) and the UNFCCC-process • Biodiversity • Environmental protection and preservation • Land use and agriculture/food • Circular economy • Climate mitigation and adaptation
Energy	<ul style="list-style-type: none"> • Security of supply • Equality of supply • Green energy and sustainability • Competitiveness (energy market) • Governance regulations (for the Energy Union) • Energy efficiency (EED) • Hydrogen • Renewable energy (solar, wind)
Research, science and technology	<ul style="list-style-type: none"> • Research and development • Innovation • Intellectual property rights • Research cooperation • Technology transfer • Innovations in the health sector (specifically in relation to COVID-19) • Smart cities • Green technology (e.g. batteries, hydrogen)
Development and aid provision	<ul style="list-style-type: none"> • Aid/ alleviation of poverty • Disaster relief • The EU and UN Sustainable Development Goals (SDGs) • Green development standards • Mitigation, adaptation and resilience support
Social	<ul style="list-style-type: none"> • Education • Multiculturalism • Equality and diversity • Migration (the EU as a receiving and sending actor) • Far right, nationalism, xenophobia, populism • Climate change activism • Socio-economic inequality
Cultural	<ul style="list-style-type: none"> • Visual and performing arts • Sports • Music • Literature • Architecture
Health	<ul style="list-style-type: none"> • The EU's internal health governance • The EU's external health governance

Source: Prepared by the Core Team.

2.4. Explanatory variables

Below we list the explanatory variables (Table 10) relevant for this study. Arranged along three levels of analysis, we used these variables in explaining and guiding the research findings.

TABLE 10. EXPLANATORY VARIABLES

VARIABLE	DESCRIPTION	MEASUREMENT SCALE ⁴⁴
<i>Global/systemic level</i>		
Geopolitical context	The global geopolitical context for each location is an important factor in how Europe, the EU and its policies will be understood and perceived. It can be assessed in terms of participation in and attitudes towards multilateral organisations, as well as dealing with global economic trends and global crises (e.g. climate change, COVID-19). It can also be assessed through the self-identification and official strategic identity narratives of all of the selected countries.	<i>Geopolitics:</i> Ranges from dissimilar, to less similar, to similar.
Regional context	The regional context for each location is yet another important factor in how Europe, the EU and its policies will be understood and perceived when imagining the world and the place and role of one's nearest neighbourhood within it. It can be assessed in terms of belonging to regional geopolitical blocks; political, economic and social interactions with neighbouring states; regional 'hegemons' and their influence on the regions; and regional trade deals with the EU. It can also be assessed through the self-identification and official strategic identity narratives of all of the selected countries when they formulate their positions <i>vis-à-vis</i> their surrounding region and immediate neighbours.	<i>Regional:</i> Ranges from coherent/united region, to less coherent, to fragmented/fractured region With or without regional 'hegemon' With or without regional organisation With or without regional agreements with the EU (trade, economic, etc.)
<i>National/state level</i>		
Political context	The national political context is important to understanding the environment in which EU policies, communications and public diplomacy outreach are being implemented, adopted, adapted or rejected. It can be assessed in terms of political system, strength of civil society, rule of law, etc.	<i>Political system:</i> Ranges from democratic, to quasi-democratic, to non-democratic. Alternatively: ranges from very similar, to less similar, to dissimilar. <i>Rule of law:</i> Ranges from weak to strong. <i>Human rights:</i> Very similar, to less similar, to dissimilar. <i>Civil society:</i> Ranges from weak to strong. <i>Media system and media freedom</i> Ranges from free to not free. <i>Assessment of Europe/the EU in third-country foreign policy discourses:</i> Ranges from negative to positive.

⁴⁴ The suggested measurement scale is included to illustrate the extent to which the variable in question is manifested in each theme.

Cultural context	Cultural differences might lead to a preference for indifference towards, or even a rejection of, EU policies; however, similarities may facilitate specific cultures to indicate openness towards 'learning from the outside' and facilitate the reception of EU public diplomacy messages.	<i>Culture:</i> Ranges from dissimilar, to less similar, to similar. <i>Cultural attitudes that underpin/prevent openness to EU messages:</i> Ranges from closed to open.
Translation	Differences and similarities in language: connotation and translation of terminology, interpretation of concepts might lead to smooth or malfunctioning comprehension and communication.	Ranges from most dissimilar to most similar.
History	Historical ties – on short-, medium- and long-term time frames – might have an impact on <i>what</i> is perceived (key themes, trends, etc.), and <i>how</i> it is perceived (connotations, evaluations etc.).	<i>Impact of historical ties on perceptions of specific policies and themes:</i> Ranges from weak to strong, as well as short-, medium- and long-term. <i>Assessment of Europe/the EU through historical perspective and context:</i> Ranges from negative to positive.
Individual and personal level		
Training and education/ personal exposure to Europe	Training and education can play a role in shaping perceptions: Includes an assessment of the general level of education and training. Personal exposure to Europe/the EU and its people can play a role in shaping perceptions of the EU.	<i>Training and education / personal exposure to Europe/the EU:</i> Ranges from low to high. <i>Assessment of the EU/Europe:</i> Ranges from negative to positive. Ranges from existent to non-existent.

Source: Prepared by the Core Team.

2.5. General methodological overview

2.5.1. Literature review

The *literature review* includes: 1) a concise state-of-the-art overview of the relevant sources – academic publications, relevant outputs by think tanks and government agencies, and opinion polls by national and international social research groups – of local perceptions of Europe, the EU and its policies in 13 partner countries published between 2015 and 2021 (explicating the *receiver of public diplomacy* perspective); and 2) a concise overview of public diplomacy initiatives by the EU since 2015 (explicating the *sender of public diplomacy* perspective, critical to the understanding of perception management within public diplomacy).

In addressing the former perspective, the *literature review* consolidates and synthesises the results of existing works published within the last five years into a single study, while building on the results of the *literature review* carried out for the 2015 study. A cross-country, cross-thematic and cross-period analysis, the *literature review* builds on the three types of criteria defined in the Inception Report: 1) main themes; 2) research criteria concerning impact; and 3) exploratory variables relating to local conditions for EU public diplomacy initiatives.

In addressing the latter perspective – namely, an overview of recent EU public diplomacy initiatives – the *literature review* engages with the data generated by interviews with EU public diplomacy practitioners from EU Delegations in the 13 selected countries. These interview data are complemented by information from an EU Policy Outreach Partnership (EUPOP) report, as well as other relevant EU documents provided by the Client and, in some cases, by the EU Delegations. The analysis was carried out in March 2021.

The *literature review*:

- produces relevant, systematised reflections concerning the key audiences, institutions and individuals with high multiplier capacities in the selected countries and regions;
- identifies persistent gaps over time, as indicated in the existing literature and by EU public diplomacy practitioners;
- identifies obstacles to EU public diplomacy activities, as indicated by EU public diplomacy practitioners;
- examines the sources of continuity and drivers of change in perceptions of Europe and the EU in the selected partner countries;
- examines the evolution of perceptions of the EU in comparison to the 2015 Study; and
- presents the future outlook in the field of EU public diplomacy and relevant research.

The *literature review* is set against the background of various critical junctures that the EU has undergone in the period 2015-2021, EU public diplomacy initiatives and programmes between 2015 and 2021, and the considerable advances made by perception studies as an area within EU foreign policy studies during the last five years.

The finalised *literature review* is presented in **Annex I (Literature review)** submitted together with this report. It begins by presenting the methodology and core findings of the *literature review*, as well as an assessment of the state of art in EU perceptions research, and the future outlook. The *literature review* synthesises the main findings on key themes, key research criteria (modes of impact), and also considers explanatory variables (especially local conditions in each location), across key audiences. This is achieved through: 1) an aggregated analysis of the main trends and patterns, as well as gaps, key audiences and evolutions; 2) a horizontal overview of the public diplomacy initiatives analysed across the 13 locations; and 3) short country summaries that provide an overview of the relevant literature and public diplomacy initiatives between 2015 and 2021.

2.5.2. Public opinion survey

The main goal of this sub-task is to gather quantitative data regarding perceptions of the EU and its policies among the general public in the analysed countries. To carry out a representative *public opinion survey*, we used online panels in each of the 13 countries. The respondent samples were provided by SYNO International, a leading global panel provider, and were based on rigorous sampling criteria (quotas) established by the research team. Online panels enable online surveys to be conducted over a short period of time by contacting a pool of pre-registered respondents and inviting them to take part in the survey. In addition to their quick turnaround, online panels offer the advantage of enabling researchers to tailor the sample to their needs (in this case, to be representative of the national population in terms of gender, age and region), and to monitor the profiles of respondents during fieldwork. The fieldwork (the period during which respondents answered the survey online) took place between 28 April 2021 and 16 May 2021.

The main themes of the *public opinion survey* in 2021 are similar to the themes of the 2015 Baseline Study, and reflect the analytical framework. Survey questions feed into the key research criteria for the 2021 Study (visibility, effectiveness, actorness, normative power, and cognitive resonance). Our review of the 2015 methodology confirmed the feasibility of applying an online approach using a panel. This approach relies on carefully designed samples that are representative of the population profile in each target country. The questionnaire was translated into local languages, and included questions on the demographic profiles of the respondents for further in-depth analysis. The languages into which the questionnaire was translated are presented in Table 11 below.

TABLE 11. LANGUAGES OF THE SURVEY BY COUNTRY

COUNTRY	LANGUAGE(S) OF THE SURVEY
Brazil	Portuguese
Canada	English, French
China	Simplified Chinese
Colombia	Spanish
Indonesia	Indonesian
India	Bengali, English, Hindi, Kannada, Tamil
Japan	Japanese
Mexico	Spanish
Nigeria	English
Russia	Russian
South Africa	English
South Korea	Korean
US	English

Source: Prepared by the Core Team.

The final results and analysis of the *public opinion survey* are available in **Annex II (Comparative public opinion survey report)**. The results are presented as weighted tables and charts for the survey questions, relating to the key indicators of the study. The survey analysis in the annex is **structured** as follows: the perceived visibility and effectiveness of EU policies; the importance of the EU as an actor, compared with other selected countries and international organisations; positive, negative or neutral perceptions of the EU, or the respondents' emotional connection with the EU (emotive charge); the normative power of the EU (or to what extent the ideas and norms promoted by the EU are supported by the respondents); and the local resonance of the EU (to what extent these resonate with pre-existing ideas and concepts in local contexts). Annex II concludes with a comprehensive summary of the public opinion poll. It also contains comprehensive frequency tables, reflecting the answers to all questions across the 13 target countries of the sample.

2.5.3. Media analysis

The *quantitative and qualitative media analyses* assess how opinion leaders in the selected 13 countries frame Europe, the EU and its policies across the main themes. Specifically, they examine which aspects of the EU receive greater visibility, including emotive profiling (positive or negative), and which of them are narrated with (or without) a 'local hook' (i.e. a link to the key partner country). The key themes provide a map to trace the thematic frames of Europe, the EU and its policies in local media discourses. The *media analyses* provide a tool to access the potential to unlock opportunities for EU public diplomacy engagement on specific themes, and to reveal which themes and perspectives

might pose risks or challenges and require a more cautious approach, defined by local specificities and framings.

Dictated by a larger research sample than the 2015 study and a tighter timeframe, the Study pursues an approach that is based on two innovations: (1) the combination of a quantitative overview of a larger press media sample (six news outlets, using keywords relating to the key search concepts 'Europe' and 'EU') and in-depth qualitative analysis of EU media coverage, where the EU is a central theme in each location, with a subsequent focus on the drivers behind higher EU visibility (*EU-, location- or region-specific, or global*) in three news sources; and (2) a comparative quantitative analysis of EU coverage by traditional media observed over three months in 2021 vs. EU coverage in social media observed during the same period.

The observation period for the traditional media analysis and social media benchmark overview (see Section 2.5.4 for more details on social media) ran from 1 February 2021 to 30 April 2021. The event-focused analysis was conducted over a period of one month around each event (i.e. two weeks before and after the event). The three events were Europe Day (9 May), the G7 Summit (11–13 June), and the EU Council Meeting (24–25 June).

The *quantitative and qualitative media analyses* were built on two elements – a quantitative analysis for general trends, and a qualitative in-depth analysis of the most visible coverage of the EU. While the quantitative media analysis tracks the main patterns in the visibility of the EU and Europe in press news reportage, the qualitative media analysis focuses on the drivers of the EU's *heightened* visibility in each location. This research design allows the qualitative and quantitative analyses to be connected, and provides a better understanding of how EU public diplomacy campaigns can be more effective and visible while accounting for the peculiarities of national news flows in traditional, reputable media. It also allows us to better account for what factors – *location-, EU- or region-specific* and/or *global* – drive the coverage of the EU in the leading agenda-setting media.

Along with this report, we submit **Annex III (Comparative traditional media report)**. The purpose of Annex III is to present the final results of the qualitative and quantitative media analyses components of the Update Study. Annex III presents the aggregated findings on EU visibility, actorness, normative power, local resonance and emotive charge in the 13 locations. Under each of these sections, aggregated analyses of EU-related and Europe-related news are presented separately. Annex III concludes with a comprehensive summary of the traditional media analysis.

2.5.4. Social media analysis

The main goal of this sub-task is to **assess the visibility of the EU and Europe in social media**, and to examine how Europe, the EU and its policies are **presented and framed** in the 13 Strategic Partner countries.

Social media analysis was also part of the 2015 Baseline Study. To ensure the comparability of results between the two studies, we build on the methodological approach used in the previous study. Thus, we analyse **coverage on social media of three key events relating to the EU** (Europe Day, G7 Summit and the EU Council meeting). The **event-related analysis** consists of both **quantitative and qualitative elements**. At the same time, we recognise and address limitations in the scope and comparability of the earlier research design. To overcome limitations in relation to scope, we

introduce a **general quantitative overview**, in which we assess the visibility by numbers of EU- and Europe-related mentions on three social media platforms (Twitter, Facebook and Instagram) over the course of three months presents country-specific data on the main indicators of the study: visibility (including EU actors, EU institutions, EU Member States and their leaders), actorness (including themes), and emotive charge (sentiment analysis of the overall sample and by themes). The same indicators are used in the quantitative part of the *traditional media analysis*. In this way, the 2021 Update Study introduces a stronger element of cross-method comparison.

Along with the Final Report, we submit the final results of the social media analysis in **Annex IV (Comparative social media report)**. Annex IV draws on the *social media analysis* to provide more practical insights into the indicators of the Update Study. The **structure** of Annex IV is as follows: it begins with an executive summary and an introduction, then moves to the quantitative review, and looks at visibility, actorness and emotive charge. All data are presented in charts and tables, and arranged by visibility, actorness and emotive charge of the EU and Europe on social media. All data are shown by country and are presented in two parts – one on the EU; the other on Europe. The annex then examines the event analysis (concerning social media coverage of Europe Day, G7 Summit and European Council meeting). Lastly, the annex presents a summary of the findings of the comparative social media report.

2.5.5. Interviews and focus groups

To assess how Europe, the EU and its policies are perceived by different groups of stakeholders – specifically, policy makers, government officials, influential media, foreign policy opinion-makers and educated youth from the 13 countries in this study – the research team employed a combination of methods including face-to-face individual *expert interviews* with multipliers and influencers, and *focus groups* with students. *Interviews* and *focus groups* are in-depth, qualitative, interpretative methods that have allowed us to track individual perceptions and gain insights into why certain perceptions arise, which experiences influence them the most, how these perceptions change, and how they interact within a more complex landscape of explanatory factors. The *interviews* and *focus groups* generated rich and nuanced data explicating current perceptions and allow us to trace the explanations to the evolution of perceptions regarding Europe, the EU, and its policies. They also provide additional explanations to the empirical findings from the *literature review*, *traditional and social media analyses*, as well as the data gathered through the *public opinion survey*.

The final results of the focus groups carried out in 13 locations are included in **Annex V (Comparative focus group report)**. The **structure** of Annex V is as follows. It begins by elaborating on the types of research participants included in the focus groups. The report then goes on to explain the main themes shared by the participants of the focus groups with regard to their perceptions of the EU. The report further elaborates on the perceived obstacles and gaps between expectations of the EU's performance, and perceptions of the EU and its policies. Annex V continues by exploring perceptions of the EU *vis-à-vis* other geopolitical actors and international organisations, as well as outlining explanatory factors for such perceptions. Annex V reviews the evolution of perceptions of the EU among young people, comparing findings of the 2021 Update Study with those of the 2015 Baseline Study. The report also includes concise country-specific chapters presenting the key findings for each of the 13 countries in the study, including reflections on the focus groups and expert interviews.

Cross-theme insights

3.1. Introduction

This chapter begins with a table summarising the key themes with regard to perceptions of the EU across the leading indicators of the analysis (see Table 6 below). It then proceeds with a detailed description of each theme, structured in accordance with the logic of the leading indicators.

TABLE 12. SUMMARY TABLE OF KEY THEMES

	VISIBILITY	ACTORNESS AND EFFECTIVENESS	THE EU AS A NORM-SETTER	LOCAL COGNITIVE RESONANCE
Economy	Strong, with emotive assessment varying according to the perceived benefit or threat to the location that is presented by EU activities within a particular economic issue area	Highly active, cohesive and effective, as well as resilient to crises	Strong/effective (may hurt or help the location)	Very strong location-specific grounding
Politics	Strong (increasing over time), mixed	Active, ranging from cohesive to non-cohesive, partially effective	Strong and mixed effectiveness, and in some instances with 'double standards'	Through the prism of bilateral relations: visible, and positive when perceived as benefitting the location
Climate and environment	Strong (increasing over time), largely positive/to a smaller extent mixed	Active, ranging from cohesive to non-cohesive, partially effective	Strong, mixed effectiveness, high local expectations triggering some negative perceptions	Strong 'local hooks', and from positive perspectives
Energy	Low, mixed	Active, ranging from cohesive to non-cohesive, partially effective	Trendsetter when linked to climate and the environment	Patchy, seen through a geopolitical lens in some locations
Research, science and technology	Low, positive	Active, ranging from cohesive to non-cohesive, partially effective	Trendsetter	High, when connected to a research agenda that is of local relevance
Development and assistance	Weakest of all themes in the 13 target countries, yet positive	Active, cohesive (with some	Strong and effective	With a strong 'local hook' and context

		reservations), capable		
Social	Significantly less pronounced compared with the Baseline Study, positive to mixed	Varies by sectors from active, cohesive and highly-effective in internal social development and education, to less active, cohesive and effective in migration	Strong (apart from the field of migration), yet ineffective	Resonates with local public as a benchmark to follow
Culture	Weak (for the EU)/strong (for Europe); positive	Inactive, cohesive, capable	Strong, capable	Colonial legacies contribute to the negative framing of the EU; cultural heritage and family ties lead to the opposite
Health	Strong, negative to mixed	Ranging from inactive, non-cohesive and non-effective to more capable and coping	Weakened, ineffective	Strong and negative when actions affect the location's handling of the pandemic; strong and positive where the EU is helping to fight COVID-19 in the location

Source: Prepared by the Core Team.

3.2. Analysis by themes

The themes incorporated in our analysis reflect the major vectors of EU and global policy context, as well as EU policy priorities (ranging from economy and trade, politics to social and climate change).

Economy and trade

Visibility – strong/emotive assessment varies according to the perceived benefit or threat to the location that is presented by the EU's actions in the particular economic issue area

The economy remains **at the core of perceptions of the EU** for all partner countries and across all cohorts and methods in the Update Study. **Strong associations of the EU with the economy in general and trade specifically** constitute stable and central elements of the EU's image in *cognitive* terms, and are the most visible over time. Across the 13 countries in the 2021 Study, the EU is framed and perceived as **a visible economic actor – bilaterally, in the respective geo-strategic regions, and in the world**. In the leading media observed in this Study that set the national agenda, the economy and trade is the second most widely covered theme, with a 22% share of coverage compared with other themes (1% higher than 'political' and 2% below 'health', Annex III). Also, economy is one of the (stereo)typical associations with the EU among local experts and educated youth (Annex V). Trade is a dominant and sometimes overpowering perception of the EU, and is associated with the EU more than it is with Europe.

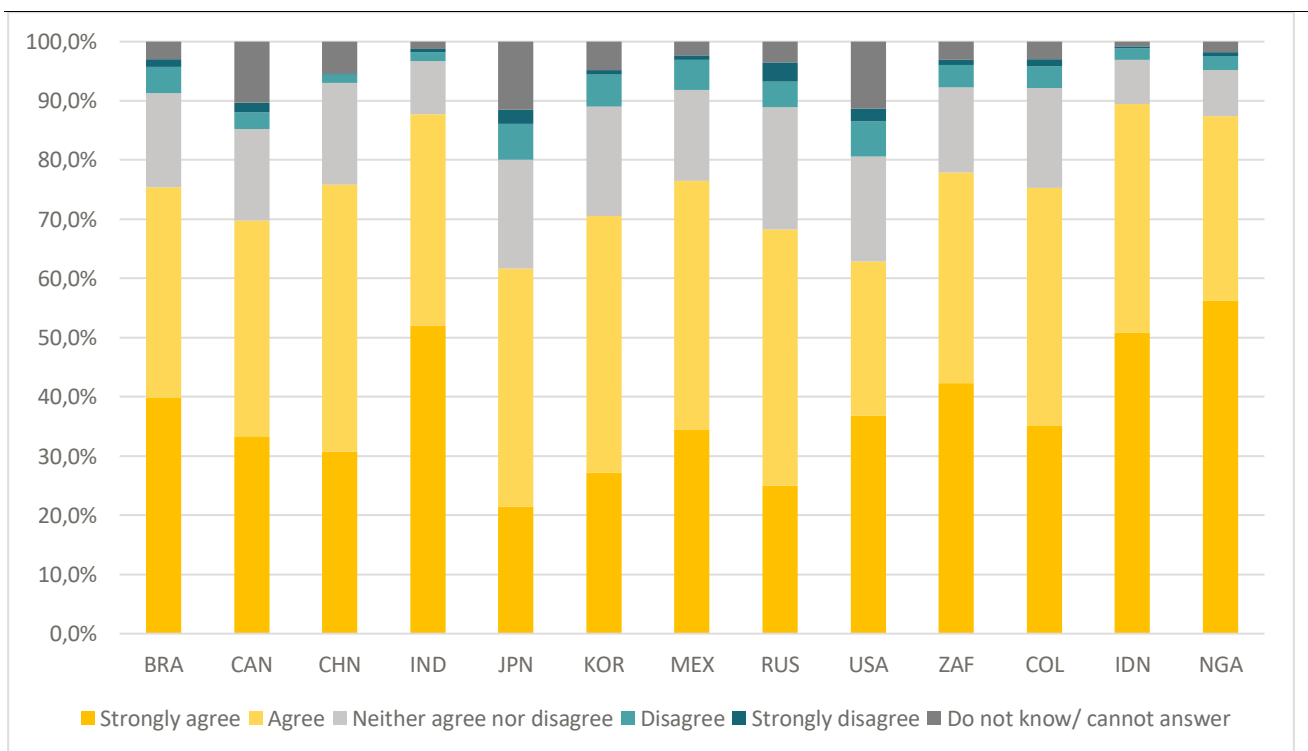
In this study, the EU has **higher visibility** when it is perceived as an economic/trading power **that can impact the locations** in focus – either presenting advantages/being instrumental in generating benefits that resonate

with local economic interests and goals, or presenting disadvantages and even threatening the economic well-being of a country. The *emotive element* of the EU’s image varies accordingly.

The 2021 Update Study registers a **high awareness of the EU as an economic/trade actor** among national experts, university youth and the general public (Annex II). When the survey respondents were asked if they see the EU as an *important trade partner for their country*, the number of participants who agreed with this assessment ranged from 61.8% in Japan to 87.4% in Nigeria. When asked if *the EU should have stronger economic ties with the country*, positive responses ranged from 45.9% in Japan to 89% in Nigeria. When the respondents were asked to assess *the EU’s perceived influence in global economic affairs* compared with other countries and international organisations, the number of those who agreed that the EU has such an influence ranged from 58.2% in Russia to 95.2% in Nigeria. Compared with other international actors in terms of its influence on economic affairs, the EU was ranked #2 in South Korea, #3 in Brazil, Canada, India and Japan, #4 in Indonesia and Russia, #5 in Nigeria and China, and #6 in Mexico. In all countries except China and Russia, the US was ranked #1. China is typically ranked #2, with the exception of China and Russia, where it was ranked as #1; in South Korea, where it was ranked #3; and in India, where it was ranked #10.

When asked how the EU is perceived as an important political partner in various fields – the EU as a partner in trade; as a foreign investor– the perception has improved in all locations except China (Figure 12).

FIGURE 12. THE EU AS A PARTNER IN VARIOUS FIELDS: PERCEPTIONS OF EU AS AN IMPORTANT TRADE PARTNER



Source: Based on the answers to survey Q15: ‘Looking from your country’s perspective, how strongly do you agree or disagree with each of the following statements about economic relations with the European Union?’.

Actorness and effectiveness – highly active/cohesive/effective, as well as resilient to crises

In general, the EU is seen as a strong and capable economic actor (Mexico, South Korea); as an international actor most significant in the economy (Russia); and as an important global economic actor and a global

powerhouse in the economy (Colombia, China, Japan). It is seen as a significant partner for local economies, with the economy being perceived as the most important theme with regard to EU policies towards the respective country (Brazil); having the greatest impact on EU's visibility in the country (US); or making the EU relevant to the location (Indonesia, Nigeria). The economy is also a sphere within which the EU's relationship with a country is most important (Canada). **The importance of economic cooperation with the EU is unanimously recognised in all locations among experts, educated youth and the general public.** The perceptions of **EU actorness and effectiveness** demonstrates an ongoing, long-term trend while at the same time being impacted by the *critical intersections* of the last five years.

Trade is an area in which the EU is expected to have the most impact, and the importance of the EU as a trade partner is well recognised in the 13 locations included in the 2021 Study. This perception was discussed in the 2015 Baseline Study (as well as in earlier studies reviewed in 2015), and is confirmed in 2021. Perceptions of the EU in the issue area of trade continue to have a very strong *location-specific* (and sometimes *region-specific*) anchor, and thus differ between locations and even across key audiences within countries. Perceptions of increased mutual benefits feed into positive expectations and images of the EU as a trade actor. Perceptions of the EU benefitting at the expense of the partner country trigger negative outlooks, and views may diverge across key audiences. For example, EU-MERCOSUR negotiations are assessed positively by Brazilian youth as being important in improving relations between the EU and Brazil. However, local experts view these negotiations more negatively, seeing them as benefitting the EU (in the case of quotas) while reinforcing Brazil's status as an exporter of primary products. Brazilian experts also see the negotiations as a missed opportunity to advance development, human rights and the environment (a *normative* perspective).

Trading agreements with the EU are a powerful factor in (re)shaping local perceptions of the EU. These include recently concluded agreements (e.g. the EU-Canada Comprehensive Economic and Trade Agreement (CETA); the EU-Colombia/Ecuador/Peru Trade Agreement; the Economic Partnership Agreement (EPA) with Japan; and the FTA with South Korea); agreements currently under negotiation (the FTA with India; the Comprehensive Economic Partnership Agreement (CEPA) with Indonesia; the EU-MERCOSUR with countries in South America); as well as those currently under revision (the EU-US trade deal or the EU-Mexico Global Agreement). One of the most protracted, the EU's FTA negotiations with India, received a more negative framing in the Indian media in 2015, yet in 2021 the Indian media cast a more positive light on the agreement in the context of the EU-India Summit 2021. The updated EU-Mexico Agreement is viewed positively by Mexican experts. Among South Korean decision makers, the EU-Republic of Korea FTA was the main turning point in improving relations between the EU and Republic of Korea, pushing both parties to take actions to meet the other's needs. How, perceptions of the EU with regard to trade agreements evolve over time. They may become less visible and have less perceived importance compared with the perceived importance of trade agreements with other major trading partners – for example, the Canada-US-Mexico Agreement (CUSMA), which replaced NAFTA, is seen by Canada as far more significant than CETA.

The EU's actions in shaping **international financial regulations**, trail-blazing in the **digital economy**, and **investing** in the partner countries are less visible, yet still recognised as effective and evaluated positively across the countries studied. Of the public survey respondents, 45.2% in Japan and 80.5% in Nigeria consider the EU to be an important foreign investor.⁴⁵ Other issue areas (e.g. agriculture, industry, etc.) are significantly less visible among local experts, students and in the media across all countries (EU actions in agriculture are slightly more visible in Nigeria, South Africa, Colombia and Indonesia).

⁴⁵ NB: in general, as this summary will demonstrate in other sections, there is a trend within our sample of 13 countries for Nigerian respondents to often be among the most enthusiastic/positive publics, and Japanese to be among the most reserved.

Brexit, a protracted and difficult process in Europe, has triggered an ambivalent external perception of the EU as a trade actor. The UK's exit from the EU is perceived as offering new trade opportunities with the EU-27, particularly in those locations where the UK used to be the main gateway into the EU (e.g. Indian experts see Brexit as a major accelerator of EU-India trade negotiations). Brexit is also considered to be the key reason behind the UK's application to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), a visible topic in the media, outlining new trade opportunities (Japan, South Korea). Negative impacts were perceived in locations where the EU's handling of Brexit negatively influences the partners, e.g. negative local media framing of the EU's bilateral trade with Mexico, which has been affected by Brexit, or reports in Japan about fluctuations in the Tokyo stock exchange market. Media reports in 2021 regarding the conclusion of the EU-UK trade agreement have raised the EU's visibility (specifically in the US, Japan, Indonesia and South Africa). The economic impacts of Brexit are, however, less visible to youth and experts.

COVID-19 has added another element to the ambivalent perceptions of the EU in this issue area. In some countries (e.g. India, the US), COVID-19 has triggered a pessimistic outlook regarding the economic impacts of the pandemic within the EU's borders and concerning its performance globally. In other locations (e.g. Brazil, China), more optimistic perceptions have emerged: external observers take note of the EU's recovery fund and expect that, with the vaccine roll-out, the EU economy will return to pre-pandemic levels. These perceptions are connected with hopes that trade will also improve after the pandemic.

The EU's difficulties to deal with the **2008/9 global financial/Eurozone debt crisis** is a marginal theme in 2021. Nevertheless, images of the EU – particularly among students – appear to be heavily influenced by the series of crises the EU has undergone over the past decade, including the Eurozone crisis (see Annex V). Importantly, even though the crisis itself is firmly a historical reference in 2021, its aftershocks are still seen as being relevant to the EU's economic well-being and its performance as an economic/trade actor (e.g. in South Korea, Russia and Nigeria, perceptions were observed that regarded Europe as being polarised economically). The perceived inequality of socio-economic development among the EU Member States adds to the image of the EU being a less coherent and powerful actor. Aside from this, EU citizens are widely recognised as enjoying a high level of prosperity.

The EU as a norm-setter – strong/effective (may hurt or help the location)

The emotive element of perceptions intensifies when the EU's actions as an economic actor are perceived to relate not only to *location-specific* interests, but also to *location-specific* norms and values. When the normative performance or declared positions of the EU in the economic sphere clash with local normative outlooks and/or do not live up to the normative expectations of the external observers, the EU's image acquires more intense negativity.

Perceptions of the EU as a capable actor able to promote and advance **norms around climate and the environment** – a new issue-area in 2021 compared with 2015 – are highly positive (e.g. in Brazil, India, Colombia, Russia). These perceptions are often linked to the EU Green Deal (an *EU-specific* factor) and economic interactions between the EU and the partner country (*location-specific*). Importantly, this perception often includes certain expectations – for example, the EU is *encouraged* by our respondents to act more proactively in the transfer of green technologies to India; to prioritise the environment over trade in Brazil; or to prioritise sustainable agriculture, eco-tourism and biodiversity in Colombia through trade agreements. The EU is perceived to possess skills, expertise and reputation in the field of the economy/trade to impact external partners towards improving their performance in the field of environmental protection and climate change mitigation (see the section below on 'Climate and the environment' below).

The image of the “**protectionist**” EU, observed in the literature regarding EU perceptions over the last 20 years, continues to be seen in 2021. The EU is seen by Indian elites and youth as protecting and putting its own economic interests first through the introduction of trade tariffs. Colombian decision makers, meanwhile, argue that the EU’s protectionist conditions generate an unequal relationship and should be reconsidered when it comes to trade. Indonesian focus group participants and experts see the EU as pursuing its interests in Indonesia and imposing its standards and policies while Indonesia still lacks the necessary capacity to cope with such requirements (for instance, the EU’s ban on Indonesian palm oil). Russian business experts perceive EU sanctions towards Russia as a means by which the EU protects its markets. More than half of survey respondents in seven of the countries (most of them developing countries) agree with the statement that the EU is protecting its markets at the expense of others: 77.4% of respondents in India; 75.3% in Nigeria; 62.3% in Mexico; 60.5% in South Africa; 59.1% in Russia; 55.9% in Colombia; and 50.1% in Indonesia.

Another starkly negative, yet not dominant, perception concerns the image of an “**exploitative EU**” observed in certain developing countries. Colombian decision makers see the EU as taking advantage of Colombia’s precarious economic situation – a partner that extracts resources, rather than a cooperative partner that prioritises the economic development of Colombia. In relation to the economic issue area, South African focus group participants describe the EU’s relationship with South Africa, and the continent as a whole, as exploitative. Educated youth in Nigeria share the perceptions of EU trade practices as being unfair and neo-colonial. Two countries in the study – Russia and China – perceive **normative political decisions of the EU** (EU sanctions against them for the violation of human rights) as impeding bilateral cooperation between the EU and these countries, and thus affecting their respective bilateral economic/trading relations. For Russian experts, one of the main consequences of the EU’s economic sanctions is their negative impact on the export of Russia’s energy resources. In the eyes of Chinese decision makers, the mutual sanctions that China and the EU imposed on each other during the first half of 2021 led to the ratification of the Comprehensive Agreement on Investment being suspended. Such sanctions demonstrate to experts how normative differences can affect economic partnerships between countries – an area widely seen as the strongest link between China and the EU (Annex V).

Local cognitive resonance – very strong location-specific grounding

Images of the EU as an economic actor have a **very strong location-specific grounding in all cases, solidifying the perception of the EU as a relevant and important interlocutor with the location**. During this unsettled period for the global economy, the EU is seen as either benefitting or disadvantaging the country. *Region-specific* inputs are typically linked to trade agreements with each country’s respective region. *EU-specific* inputs into perceptions of the EU on this issue-area are often associated with crises in Europe: for example, Brexit, COVID-19 and overcoming the Eurozone debt crisis. However, the Update Study 2021 also finds evidence for the resilience of the EU’s image: while the EU is seen as being negatively impacted by crises, it is also perceived as an actor that is able to overcome and recover from them. The *EU-specific* factor of the Green Deal is perceived in distinctly positive terms, contributing to the EU’s profile as a highly beneficial partner and model for third countries. Images of the EU are also affected by *global* factors: the need to recover economically post-COVID-19, to advance technologically, and to address economic growth in the context the impending climate emergency.

Continuity and change

Perceptions of the EU in the issue areas of the economy in general and trade specifically continue to be the most visible and characteristic external images of the EU over time. When compared to the 2015 study, the EU continues to be framed and perceived as a visible and recognisable economic actor – bilaterally, as well as with regard to the respective geo-strategic regions, and in the world. Between 2015 and 2021, the EU has

demonstrated an image of resilience in the face of the Eurozone debt crisis. This image of resilience is also noted in perceptions of the EU with regard to the two other major shocks noted by external observers as impacting the EU's economy: Brexit and the COVID-19 pandemic. Perceptions of the way in which the EU has coped with these crises depict the EU as an actor that manages to overcome challenges, as well as including some initial negative perceptions. Perceptions of the EU as a capable actor in promoting and advancing environmental protection, sustainability and fighting climate change are new in 2021 compared with 2015. These perceptions come with distinctly positive assessments. However, the Update Study 2021 tracks negative long-term normative perceptions, in which the EU is seen as protectionist and as a neo-colonial actor. Another lasting perception of the EU is that of an economic actor that brings political norms and values into the market through interactions with its global partners. The EU continues to be seen as an important economic partner and as an influential global economy. However, in the eyes of the general public, the EU's global economic influence has decreased compared with 2015, as China's has grown.

Politics

Visibility – strong (increasing over time), mixed

Politics is another core cognitive element of perceptions of the EU. Overall, perceptions of the EU as a political actor have become more visible and more intense (across all methods of assessment used in the Update Study) compared with 2015. In comparison to other themes, politics is covered the most – thematically, it represents a 23% share of traditional media coverage (1% more than *economy* and 3% more than *health*, see Annex III). The Update Study finds that attitudes in this issue-area are heavily influenced by the perceived alignment of EU policies with local interests. Furthermore, the EU is perceived according to assessments of normative like-mindedness visible in EU actions at a *systemic* level (e.g. multilateral worldview and attitudes towards the values of multilateralism and rule-based world order), *nation-specific* level (bilateral political interactions, *location-specific* norms and values) and *individual* level (e.g. generation-specific perceptions, or perceptions of the EU in the political issue area among the general public vs. experts).

The higher visibility of the EU as a political actor in 2021 compared with 2015 is triggered by a number of *EU-specific factors*: 1) the EU's domestic and international political response to COVID-19 (see also the section on health); 2) the EU's reactions to human rights violations in the world, including in some of the key partners in this study; and 3) internal divisions within the EU (specifically, democratic backsliding in some EU Member States and the aftershocks of Brexit). Images of the EU as a political partner also depend on *location-* and *region-specific* factors – political leadership and changes in key partners and the course of bilateral and regional relations.

The European Commission (EC) is the **most visible EU actor**, in the context of both internal and external relations, in the media coverage in all but two countries: China's leading press focuses heavily on the European Medicines Agency (EMA) and give a minor profile to the European Commission, while South Korea's main newspapers prefer to report on the European Central Bank (ECB) (Annex III). In 2015, the ECB and its head were the most visible actors in the context of the economic crisis in Greece (back then, China prioritised the EC, however). Meanwhile, the social media analysis demonstrates a high level of visibility for the European Parliament (see Annex IV). Similar to 2015, Germany and France are most visible in leading press outlets as the political leaders of Europe across all countries in the sample.

Actorness and effectiveness – active/ranging from cohesive to non-cohesive/partially effective

In terms of the EU's perceived **international leadership**, overall perceptions remain ambiguous, echoing the trends reported in the 2015 study. The EU is seen by decision makers and educated youth as **having the capacity and capability to be an influential political-normative actor and an international leader**. At the same time,

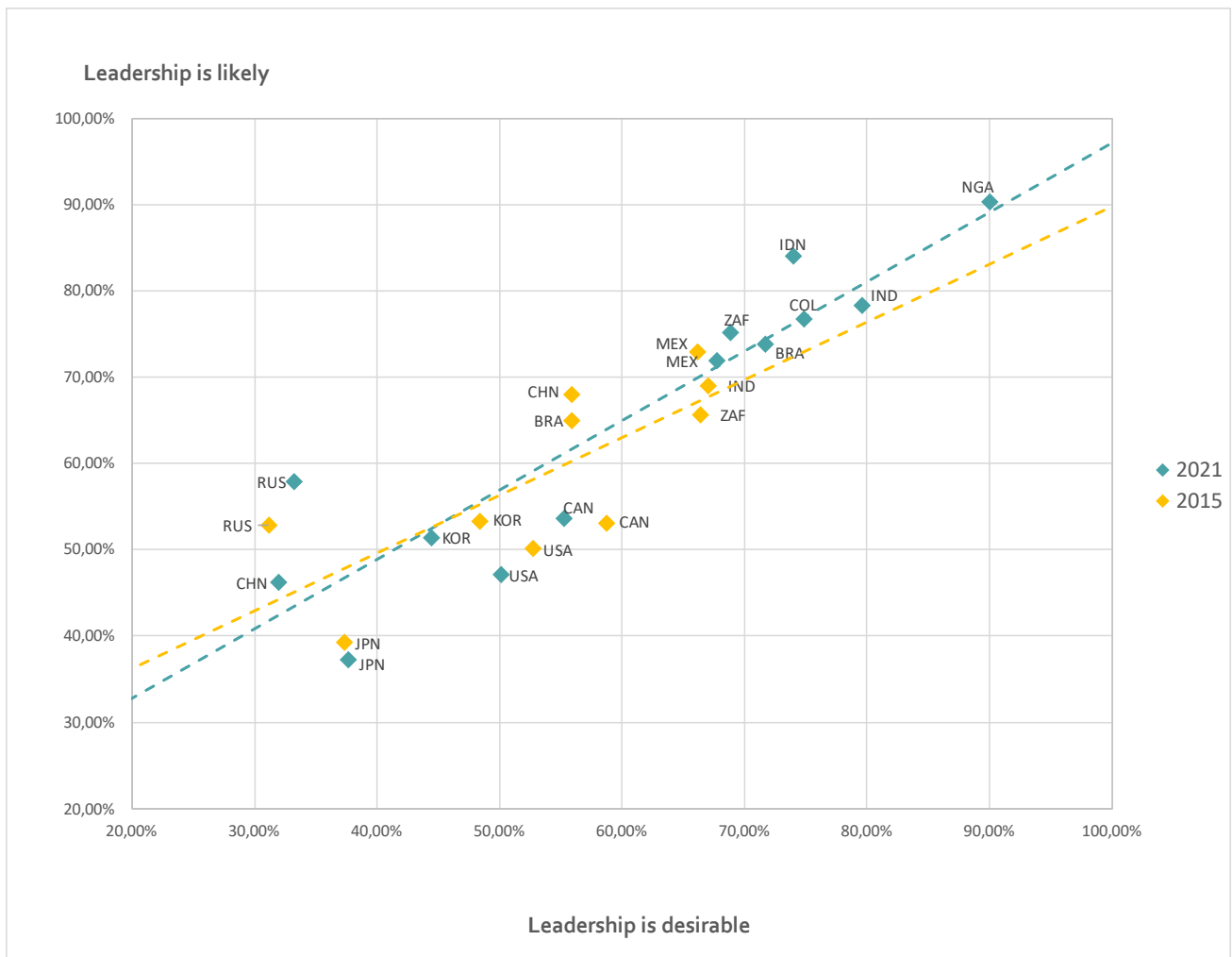
however, external observers **question its effectiveness**, as it is often seen as not affecting the overall international system as much as other actors. Key audiences in the partner countries, similarly to 2015, continue to see the US as holding global leadership in the areas of politics in general and military power in particular. In contrast, perceptions among national experts of the EU as a modest military power remain remarkably stable (e.g. the EU's regional security performance in the Indo-Pacific is not fully considered among the key audiences). When the survey respondents were asked how good or bad they regard the EU's performance to be in the political areas of military operations, peace-keeping and fighting terrorism/radicalism, responses ranged between 'very good' and 'fairly good'. In the first two categories, the least recognition comes from Russia (30.8% and 29.9%, respectively) and China (39.1% and 32.8%, respectively). The highest level of public recognition of the EU in the issue areas of military operations and peace-keeping comes from the general public in Indonesia (86.9% and 76.4%), Nigeria (85.8% and 83.2%) and India (73.9% and 77.5%). The public opinion survey in Japan registered the lowest level of recognition (36.2%) for the EU's performance in the issue area of fighting terrorism and radicalisation. The general public in Indonesia, Nigeria and India are the most positive in their assessment of the EU's performance in this issue area (78%, 78.9% and 79.9%, respectively). Overall, the general public in Japan, the US and South Korea are more reserved in assigning positive assessments to the EU's performance in the above three issue areas (positive assessments are below 50% in each country).

Assessing EU actorness in *external* relations, the study observes substantial media attention being paid to a range of events, and projecting varying messages regarding the EU's effectiveness (e.g. among the issues reported during the period of observation were Iran's refusal to accept the EU's invitation for informal talks on the country's nuclear programme; the controversial visit to Moscow of EU High Representative Borrell at the start of 2021; and the EU's support for Ukraine in the context of Russian military deployment at the country's border).

At the same time, influencers in all countries perceive the EU as a **balancing and critical force in international diplomacy**, with **strengths in soft power and public diplomacy**, while a large number of survey respondents perceive that **the EU is important for maintaining global peace and stability** across the 13 target countries (ranging from 63.7% in the US to 93% in Indonesia). When the general public assesses various international actors in terms of their **desirability vs. likelihood of future leadership in global affairs**, EU leadership is perceived favourably on both indicators in almost all locations (see Annex II). Only in China is there a high degree of indifference (a neutral position) towards the EU's leadership role. Respondents in China place the EU alongside emerging powers such as South Africa and Brazil.

Overall opinions of the EU's global leadership have remained stable over time in the majority of the countries with the exception of India, Brazil and Russia, where public opinion of the EU's global leadership has deteriorated (Figure 2).

FIGURE 2. CHANGES IN OPINIONS ABOUT EU GLOBAL LEADERSHIP IN 2021 COMPARED WITH 2015



Source: Based on replies 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?’, public opinion surveys 2015 and 2021. The vertical axis presents the share of respondents who replied that EU leadership is ‘very likely’ or ‘somewhat likely’; the horizontal axis presents the share of respondents who replied that the EU leadership is ‘very desirable’ or ‘somewhat desirable’.

Similarly to the 2015 study, the main reason cited by experts and educated youth against the EU as an international leader is the **perception of it being disjointed** in the way some EU Member States position themselves *vis-à-vis* the EU in power relations. The more closely an issue is perceived as relating to the national sovereignty of Member States, the higher the perceived tension within the EU, and the more difficult it appears to external observers for the EU to reach a consensus on EU collective action.

The economy, together with politics, are still the leading themes in perceptions of the EU in 2021, particularly in the context of healthcare and **the EU’s handling of the COVID-19 pandemic**. In 2021, the EU’s political reactions on issues internal to the Union are perceived to be of consequence to EU stakeholders and citizens, and as impacting third countries and the global community. While the President of the EC is the most visible actor in this context, another visible EU political actor in the context of COVID-19 across many locations is HR

Josep Borrell. The threat presented by the pandemic has elevated the importance of political decisions taken by the EU in the eyes of its external partners, introducing an immediate ‘local hook’ to perceptions of the EU’s political actions, even if they concern only EU Member States or EU activity at global level. Higher visibility is thus assigned to the EU’s political decisions in the context of the pandemic across all studied cohorts, as well as in the news (see Annexes III, IV and V). Strong opinions are held on many of the EU’s political decisions – including on vaccine access for third countries and a perceived ‘Europe-first’ approach, which receives strongly negative portrayals (see section on ‘Health’ for more details).

Brexit continues to influence perceptions of the EU in the political issue area in 2021 in a mixed way: e.g. the US press reports deepening EU integration post-Brexit as a positive development, while the South Korean press chooses to focus on the uneasy political relations between the EU and the UK in a more negative light. In social media posts, through the lens of the G7 Summit, the tensions between the UK and the EU receive harsh criticism as an issue that overshadows G7 negotiations. However, in such coverage, the UK appears in a more negative light than the EU. For students in all locations, Brexit remains one of the main EU-related political issues that negatively influence their perceptions of the EU as a united actor, because it has threatened the EU’s ideal image as a model for regional integration. However, focus group participants carry a positive image of European integration in general, and see it as a model to emulate (particularly for Asian regional integration). The assessment of general awareness of the EU in 2021 demonstrates that among the general public, positive perceptions of the EU’s support for **regional and international cooperation** range from 45.2% in Russia to 92.5% in Nigeria. However, compared with 2015, the average positive assessment of the EU by the general public on this issue-area has dropped from 66.7% in 2015 to 60.7% in 2021. While perceptions of the EU’s position (aside from Brexit) is within the frame of the G7 Summit are positive, the gathering as a whole is evaluated critically by social media in the US and South Africa, and the Summit is viewed as too Eurocentric.

The EU as a norm-setter – strong/mixed effectiveness, and in some instances with ‘double standards’

The most visible political profile in 2021 is assigned to **the EU’s strong position and action on violations of human rights and democracy in the world**. EU actions in two cases capture most of media and the attention of key audiences in all countries: China and Russia (specifically, China’s treatment of its Uyghur Muslim minority population, and the poisoning and imprisonment of Russian opposition leader Alexei Navalny).

In China and Russia, the framing of the EU in relation to these issue in the media and among experts is more negative than in other countries. In these locations, the EU’s policies are framed as normatively different and hostile. An important finding in 2021 is the strong synergy emerging in the framing of the EU between the agenda-setting media in both Russia and China. In both countries, influential press outlets use the EU’s treatment of the other country as an example of the EU as engaging in unfair behaviour that violates and demonstrates disrespect for local norms, sovereignty and the right to self-determination. Public opinion reflects the opinions of experts and the views expressed in leading media.

For Chinese experts and media, multiple internal crises within the EU have tarnished the Union’s image as a capable global norm-setter. These experts regard the balance of power between China and Europe as having further shifted in favour of China. EU statements regarding democracy and human rights violations are increasingly seen in China as a meddling in internal Chinese affairs, and tinged with a degree of hypocrisy. Chinese media reports concerning the EU support this narrative of EU meddling in China’s internal affairs when it comes to the EU’s position on human rights violations in China. This theme in perceptions of the EU has remained highly debated since 2015. Likewise, some of the Russian press report on EU sanctions in response to Alexei Navalny with references EU hypocrisy and double standards in the sphere of human rights.

Among the general public, the **recognition of the EU's promotion of human rights as a pillar of EU foreign policy** differs between locations. The share of responses that see the EU as 'very important' on this issue-area range from 17.8% in Russia and 28.5% in China to 70.9% in Brazil, 71.1% in Indonesia and 74.9% in Nigeria. Compared with 2015, perceptions of the EU in this category have **remained stable in the US, and grown positively in all locations except China** (which saw a drop of 10.2%). Brazil shows the sharpest growth, from 39.3% in 2015 to 70.9% in 2021. Overall, there is a **high level of generally positive awareness of the EU's global performance in the domain of human rights**. Including both those respondents who think the EU is 'very important' and those who think it is 'somewhat important', this positive perception ranges from 65.2% in the US to 97.9% in Nigeria. The EU ranks #1 in Colombia, Nigeria and Russia; #2 in Canada, South Korea, Mexico and South Africa; #3 in the US, Japan, Brazil and Indonesia; and #4 in China and India.

Within the frame of the G7 Summit, the EU is perceived negatively in Chinese social media, given its condemnation of human rights abuses in Xinjiang. The EU is also seen as reacting to violations of norms in other locations – typically, this is visible in *region-specific* contexts (e.g. South Korean media reports on EU reactions towards North Korea; Colombia towards Venezuela; India, Indonesia and Japan towards Myanmar). EU sanctions against Belarus and EU support for freedom of the press in Turkey are discussed on social media within the frame of the European Council Meeting. Experts and youth affirm a **vision of the EU as playing a significant role in global democracy and the promotion of human rights**. These assessments are considered from a local standpoint, and as such trigger stark emotive profiles. In 2015, the image of the EU's actions in the issue area of human rights were highly visible, yet negatively tainted by the EU's handling of the migration crisis. This negative image has lingered, and is especially strong among educated youth, as demonstrated by the 2021 focus groups (see Annex V). When the survey respondents are asked how good or bad they regard the EU's performance to be in the political areas of dealing with refugees and displaced people, the combined responses 'very bad' and 'fairly bad' range from 3.6% and 3.8% in Indonesia and Nigeria, respectively, to 25.1% in Russia. With regard to this issue, the EU is seen negatively by more than 10% of respondents in South Korea (18.3%), the US (17.9%), Brazil (16.7%), South Africa (15.6%), Canada (15.4%) and China (13.3%).

In 2021, human rights **remain a highly sensitive political issue area** in the EU's external dialogues, and each location in the study has idiosyncratic perceptions of the EU in this field (see the Country Reports in Volume 2). For example, experts in Indonesia still harbour some doubts as to whether the EU shares common values with their country, and demonstrate highly negative sentiments with regard to the EU's tendency to 'lecture' Indonesia on the implementation of human rights (the death penalty in particular). Japanese decision makers question the effectiveness of the EU's human rights promotion and the tone of EU human rights diplomacy, particularly in Southeast Asia. Experts and students in Brazil, Nigeria, South Africa, Indonesia and Russia also reference 'double standards' in the EU's record on human rights.

Normative clashes within the EU – specifically with regard to democratic backsliding and populism among certain EU Member States (in particular Hungary and Poland, and in 2021 mostly in the context of curtailed freedom of the press in these two states) – **are highly visible** among students and decision makers, and reported in media. This perception clashes with the overall high expectations applied to the EU as a normative leader. Among the youth specifically, there are significant concerns regarding **democratic backsliding in the EU** (specifically radical movements and parties, and high levels of populism in EU Member States) (Annex V). In Russia, a different perception emerges among youth, in which the perceived differences in values between the EU and some of its Member States (e.g. Poland) make Russia look not significantly different from the EU, and this normative resonance brings some parts of the EU and Russia normatively closer to each other.

Local cognitive resonance – through the prism of bilateral relations, visible and positive when perceived to benefit the location

In terms of a more general level of awareness of the EU as a bilateral partner, more than two-thirds of respondents in every location either agreed or strongly agreed with the statement that the EU is **an important partner to their country in international relations**, and more than half of respondents in all countries except Russia and China recognised the EU as a **trustworthy partner in international relations**.

Perceptions of the EU through the prism of **bilateral relations** factor in **local cognitive resonance**. EU actions that are perceived as being of benefit to the political interests of the country not only become visible, but also attract positive evaluations. Views among respondents in China and Russia are more positive where opportunities for greater cooperation are identified. The EU is perceived as a highly relevant actor in the Colombian domestic political arena, and from a very positive angle – specifically in the context of peace. For Colombian students, media and experts, the EU's objectives of promoting peace and stability through its support for the Colombian Peace Process demonstrate exemplary leadership on the part of the EU, and highlight the EU's high level of performance in political affairs. In India, the EU's political role in the Indo-Pacific (India's economic and political centre of gravity) is reported overwhelmingly positively.

In contrast, perceived **clashes with and threats to local political interests trigger negative perceptions of the EU**. In Russia, the EU is mostly perceived as an economic integration organisation, but one that is closely linked to the US and NATO – namely, Russia's adversaries. The EU is seen as playing a negative role in the 'colour revolutions', the 'Arab spring', 'humanitarian interventions' and especially as Russia's antagonist in the Ukraine crisis. Negative perceptions of the EU in the context of bilateral relations also appear where a key partner perceives a 'cooling-off' in the strategic partnership (e.g. in Brazil, where the self-perceived decline of geopolitical significance impacts how the importance of the relationship to the EU as a strategic partner is impacted) (a *location-specific* factor). Similarly, negative perceptions arise when a country feels potentially sidelined by a regional hegemon (e.g. in Canada, which hopes not to be overshadowed by US-EU relations during the Biden administration) (a *region-specific* factor). Changing political priorities internally within a key partner can also alter the EU's image (a *location-specific* factor). In interviews, experts from the US noted how the country's changing political landscape during and since the Trump Administration has shifted conservative voters away from policy preferences associated with the EU.

Continuity and change

The political theme remains at the core of the EU's external image, and compared with 2015, it has become **more visible and more intense**, given a combination of *EU-specific* and *location-specific* factors. Tellingly, the political body of the EU, the EC and its leader, are the most visible EU actors overall in 2021 (vs. 2015, when the ECB and its head had the most visible profiles, in the context of the Greek economic crisis). Two Member States – Germany and France – continue to be framed as the political leaders of the EU by the agenda-setting media.

As in 2015, the EU's international leadership is still the subject of ambiguous perceptions in 2021. While its leadership potential is recognised, it is seen to be undermined by the image of a disjointed, non-cohesive relationship among EU Member States. The EU continues to have a low profile as a military/security actor. The EU's performance in the issue area of human rights continues to receive a lot of attention among external observers; however, the context in 2021 is different from that in 2015, and perceptions are mixed. While in 2015, the EU's image as a human rights agent acquired a negative aspect in response to its handling of the migration crisis, in 2021 **highly visible images emerge, both positive and negative**. In 11 of the selected countries, positive images are linked to perceptions of the EU's resolve against human rights violations around the world (and against China and Russia in particular although with differences in framing and location-specific reservations).

In China and Russia, the same actions on the part of the EU are seen in a highly negative light. In general, the framing of the EU in both of these countries has become increasingly similar over time, a trend not observed in 2015. At the same time, democratic backsliding inside the EU is perceived negatively, prompting perceptions of the EU as having ‘double standards’ when it comes to political norms. Such perceptions of ‘double standards’ were already visible in 2015 in the context of the migration crisis. **The migration crisis continues to negatively taint the image of the EU as a political actor. Two new inputs – Brexit and COVID-19 – have introduced even greater ambiguity and polarisation of the EU’s image as a political actor.**

Despite this ambiguity, and similarly to 2015, the EU continues to be perceived by the majority of the international public as an important and trustworthy partner, a desirable leader, committed to maintaining peace in the world. Comparing the average levels of positive assessment given to the EU’s performance in the various political issue areas across the 10 countries that participated in both the 2015 and 2021 studies, there is evidence of an improvement in public attitudes. On foreign policy, positive assessment has improved from 52.5% in 2015 to 58.6% in 2021; on the fight against terrorism and radicalism, it has improved from 49.1% to 55.4% over the same period; on the role of the EU in peacekeeping operations, the share of positive assessments has increased from 52.3% to 54%. Meanwhile, there has been a decrease (on average) in negative perceptions of the EU in dealing with refugees and displaced people (16.8% in 2015 vs. 14.9% in 2021).

Climate and the environment

Visibility – strong (increasing over time), positive/mixed

In 2015, the theme of climate and the environment played only a marginal role, and it did not drive the EU’s visibility significantly. In 2021, while the theme of climate change and the environment still represents only 4% of total EU media coverage, but this theme drives the EU’s visibility in news stories that focus on it as a major actor. In the qualitative media sample in many locations, climate change and the environment are on equal footing with the economy, health and politics. The theme evokes strong cognitive and mostly positive associations on its own (especially among youth), as well as in conjunction with other issue areas such as the economy, research, science and technology, and energy. With climate and the environment being a major driver of the EU’s visibility – alongside others such as economy, politics and health – albeit significantly more positive – across cohorts and countries, this theme carries particular potential to become a future central element of the EU’s image in cognitive terms, and key to driving visibility over time.

Overall, perceptions of the EU as an actor in this field have become more visible and more intense. The public opinion survey shows that while the public in all countries perceives the EU as a positive actor on climate and the environment, the public in Nigeria, Indonesia, Colombia perceives the EU more positively, while in the US, Japan and China, the public is more moderate in their assessment. Overall, the Update Study finds attitudes to be positive, though sometimes mixed where they are influenced by particular *location-specific* factors (e.g. palm oil in Indonesia). Expectations for the EU to perform in this field have increased significantly since 2015. The EU’s visibility in this theme is driven by *global-specific*, *EU-specific* and *location-specific* factors, although recognition of the EU’s leadership is driven largely by *location-specific* factors, and increases significantly when connected to ‘local hooks’ across all cohorts.

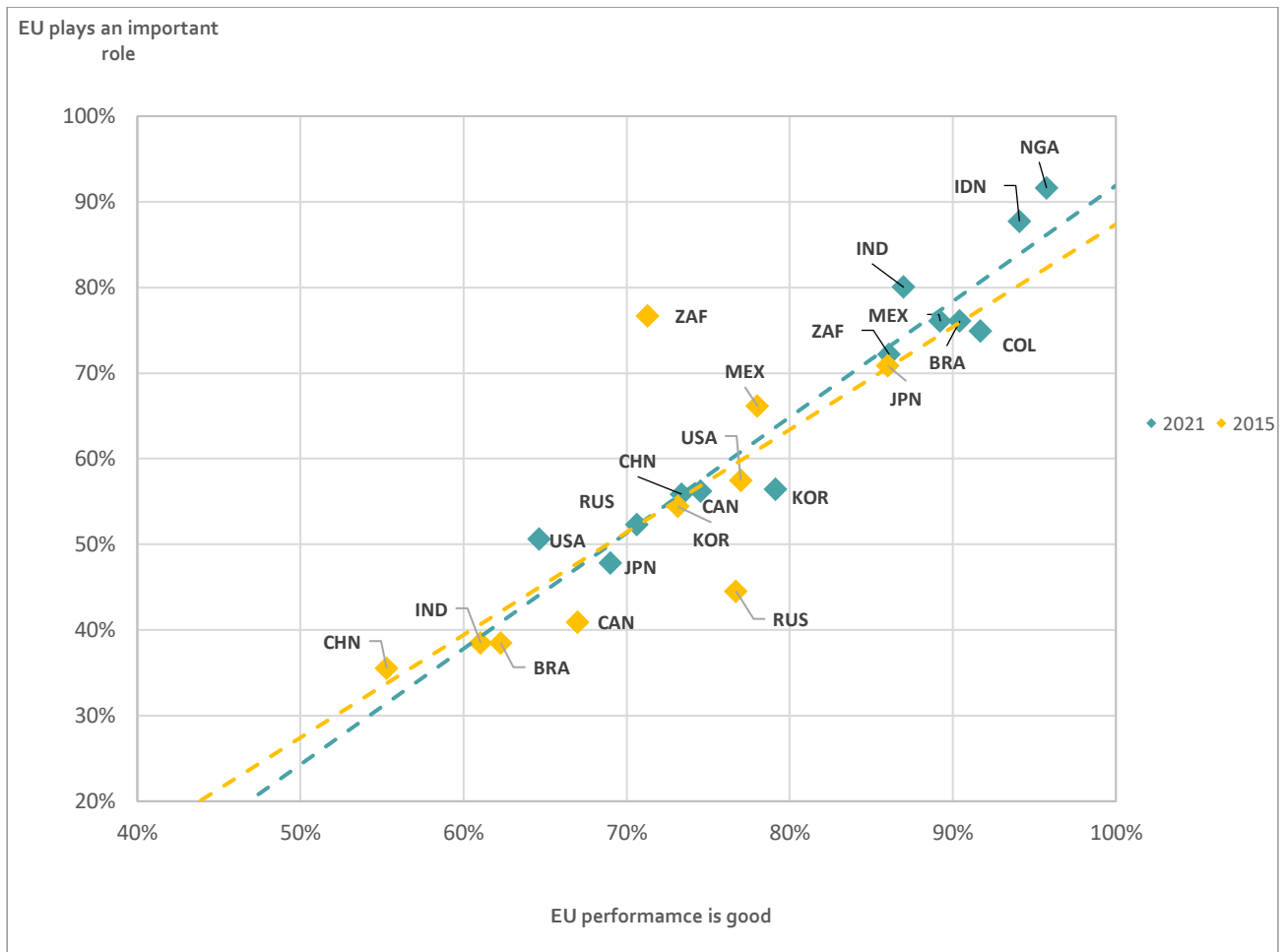
The media in several countries point to the EU’s international role in climate change governance, largely in a positive way. EU initiatives on climate change mitigation are framed positively in Indonesia, for example. Chinese media point to EU regulations on emissions control and reduction, and the legally binding consensus among EU Member States on carbon neutrality by 2050. Positive framing of the EU in Chinese media further extends to the exchange of knowledge and technology on climate change and the Chinese government’s expectation of shaping global climate change governance with the EU as a partner. In India, the media

discussions speak of the EU's role in international discussions on carbon neutrality, and extend further to other issues such as renewable energy, the initiative taken by the Coalition for Disaster Resilient Infrastructure (CDRI) and the EU Green Deal for disaster-resilient infrastructure and management. The theme of sustainable development also features in Nigeria. Russian media frame the Green Deal positively in the context of potential cooperation between Russia and the EU, specifically on hydrogen. However, some EU initiatives in this issue area receive mixed evaluations. A 'carbon tax' is seen as a unilateral policy by the EU that pushes and targets developing countries, and thus benefits the EU (media reports from India, Russia). Russian media further question the EU's perceived reliance on renewable energy sources, with regard to their reliability as an alternative source of energy. Similar views were expressed in one article in South Africa. According to Russian outlets, equipment relating to renewable energy produces more emissions than energy sources based on fossil fuels. Furthermore, the EU Renewable Energy Directive II (RED II) is framed negatively by Indonesian media, especially with regard to the EU's ban on imports of palm oil (relevant to both Indonesia and Malaysia), and is interpreted as deepening the gap between rich and poor nations. Japanese media, while not directly connecting a carbon tax in Europe with Japan, point to the financial losses that Japanese companies could face as a result of the EU's carbon border adjustment mechanism. They see the mechanism as favouring EU companies, incompatible with free trade, and against Japan's economic interests. Social media analysis shows that while the environment and climate change are among the least visible themes, overall evaluation of the EU on this theme is very positive or rather positive across all 13 countries.

Climate and the environment are among the leading themes in perceptions of the EU among educated youth. Even though the relevance of this theme varies between locations and respondents, in most locations climate change and environment are among the top three areas in which EU actions are perceived to be of relevance to domestic and global interests. In addition, the significance of the theme has increased since the group interviews conducted in 2015. Increased visibility of climate and the environment across cohorts also elevates the visibility of other areas closely connected to the theme, including research, science and technology, and energy. Visibility among experts across locations is less pronounced than among youth, which suggests the theme's cohort-specific visibility.

Among the general public, the EU is more widely perceived as an important than it is as a positive actor in fighting climate change (Figure 3).

FIGURE 3. PERCEPTIONS OF THE EU’S ROLE IN FIGHTING CLIMATE CHANGE



Source: Based on the answers to Q8: ‘In your view, how important or unimportant a role do each of the following countries or organisations play in fighting global climate change and protecting the environment?’ and Q16 (Q15): ‘Generally speaking, how good or bad do you think the European Union performs in each or the following political areas - Fight against climate change and protection of the environment?’ The horizontal axis presents the share of respondents who chose the answers ‘Very important’ or ‘Somewhat important’; the vertical axis presents the share of respondents who chose the answer ‘Very good’ or ‘Fairly good’.

Actorness and effectiveness – active, ranging from cohesive to non-cohesive, partially effective

While the visibility of this theme has increased since 2015, perceptions of the EU’s actorness in public opinion have fallen but remain high across all locations. An average of 57.25% of the public opinion polls respondents recognise the EU’s importance in fighting climate change, often together with China, the US and the UN. Only in Russia and South Korea has the EU’s perceived importance fallen below 30% (24.2% and 33.5%, respectively). While the EU’s ‘hard power’ qualities are not always recognised, the EU is seen across countries and cohorts as a leader on climate and the environment. When the Union is mentioned in the context of the environment and climate change, young people in all locations assign actorness to the EU. Young people in South Korea refer to the EU’s global leadership in this area, and those in Japan do so more often than in relation to other international actors such as the US and China. The EU is seen as leading by example (Japan) (Annex V). The reflections on the EU’s climate and environmental leadership across cohorts differ significantly from the literature over the

five last years, which has rarely researched perceptions of the EU in relation to the issue area of climate change and the environment.

EU leadership in this area is also referenced in the media across locations. In the field of the environment and climate change, the EU is seen a leader even in those locations where it is not acknowledged as a global political actor (India, Russia) or in countries where the EU's visibility in the area of environment and climate change is lacking or less frequently mentioned (Indonesia, South Korea, Colombia, Nigeria, South Africa). Although the theme of the environment is in the second tier of EU media coverage in terms of the total number of articles published, the press clearly presents the EU as a dedicated international actor (at least in terms of its declared policy) on climate and the environment. This thematic frame is also evaluated significantly less negatively than in articles concerning politics, the economy and health. Russian media reports on the EU's climate policy and its impact on bilateral relations. For the Nigerian press, the EU's green economic growth, agri-business and green recovery have a visible profile. In Brazil, resistance by EU Member States to ratifying the EU-MERCOSUR agreement due to Brazil's lack of action on climate change receives considerable and positive media attention (linked to the theme of the economy). The Indonesian press reports on EU contributions to relief for hurricane victims (linked to the context of social issues), and EU restrictions on palm oil imports in the context of deforestation.

Perceptions of the EU's actorness may be driven by *global-specific* factors such as an overall increase in attention to the climate crisis, and (as will be discussed in the section below) an increase in expectations for the EU to perform in relation to this theme. Overall, EU leadership in this area is assessed more positively than in other themes, and fits within the normative frame through which this theme is viewed. On average, the EU is seen as effective in creating climate governance structures and regulation, as well as in setting international standards. It does, however, also receive some more critical appraisals – for example, when the Russian media question the EU's effectiveness in curbing its domestic emissions. Climate change was also mentioned as a topic of discussion on social media during the G7 Summit. Alongside other G7 members, the EU is expected to tackle climate change and financially support clean economic development. Climate change was also recognised as an important issue, and the EU's role in this area attracted attention on social media around the time of the European Council Meeting, albeit to a lesser extent.

The EU as a norm-setter – strong/mixed effectiveness, high local expectations triggering some negative perceptions

Similarly to the themes of the economy and politics discussed above, **perceptions of the EU as a leader on the environment and climate are accompanied by high expectations of such EU leadership** in this area – especially among young cohorts. Such expectations are connected with a hope that EU leadership can benefit the partner countries and drive more ambitious domestic action (Brazil, India, Japan, South Africa). Some experts (Japan, South Korea) see the EU as a leader in this regard, but to a less pronounced extent than young cohorts. However, students are less clear about what would constitute the successful fulfilment of their expectations. Some students expect greater investment in environmental protection and climate change mitigation in their country (Colombia), while others are interested in the EU's specific action on tackling the effects of climate change such as droughts (South Africa) or deforestation (Brazil).

Most students do not perceive EU actions in this area as interfering with national sovereignty. They are more open to EU interference in national policies in this field, which suggests room for manoeuvre and influence. For example, Japanese students perceive the EU's stance against the public financing of coal power plants positively, while Brazilian students support pressure on the Brazilian government concerning deforestation.

The exception here is Indonesia, where students disagree with the EU's ban on palm oil. Such reflections are more complex and nuanced than the recognition of the EU's role in this area by media outlets or experts.

Students' high expectations towards the EU in the field of the environment and climate change also trigger certain negative perceptions. South Korean students regard the EU's environmental actions as not sufficiently visible, and EU implementation policies in this area as not distinct enough. Students in India and Indonesia also feel that the EU falls short of developing more intensive cooperation, especially with regard to green technology transfer. They hope the EU will play a more proactive role in this regard. Some students fear that the end of Angela Merkel's chancellorship in Germany may negatively affect the EU's climate leadership (Brazil, Russia). As such, circumstances in Member States also affect the way in which the EU's leadership in this area is perceived. The media are less pessimistic about the EU's future role in climate change, however, but are also less attentive to this theme in general.

Local cognitive resonance - strong 'local hooks' and from positive perspectives

The issue area of climate and the environment is of interest to students in Brazil, Colombia and India, and functions as a *location-specific* driver of perceptions when connected to a 'local hook'. Several media outlets also report specific EU actions in this issue area with a strong 'local hook', and from a positive perspective. For example, in India, the regional edition of the *Times of India* (Chandigarh edition) reports on the celebration of Earth Day (with EU delegates) in Roorkee. EU water supply projects in India and relevant technology are also reported in a positive manner. In Colombia, the press favourably reported EU actions on preserving biodiversity in Colombia and sustainable agriculture. In addition to these locally grounded reports about the EU, globally relevant themes relating to the environment and EU actions in this context also receive positive attention in Colombia. EU actions on climate and the environment also receive major and positive attention in Nigeria. The media in Nigeria focus on the EU's plans for green economic growth, the green recovery and agribusiness. Nigeria also displays the highest share of public opinion recognising the EU's leadership role (75%), with an overwhelming 'very positive' evaluation of 74.1%. This suggests that the theme is a strong avenue via which to project EU leadership, especially in contexts in which the EU is potentially seen more critically in other areas. The 'local hook' also carries weight in terms of the way in which local experts recognise the EU. Interviewees in South Korea, for example, view the EU's environmental and climate policies as having significant consequences for the country. On social media, the EU's role on environmental protection and climate is regarded positively everywhere except for Mexico and Brazil.

Continuity and change

The EU's visibility on climate and the environment has increased significantly since 2015, especially among young cohorts, and demonstrates clear potential to be a future key cognitive cue through which to project EU leadership. It worth noting, however, that an increase in visibility also means an increase in expectations of the EU – particularly with reference to *location-specific* drivers. While this trend decreases perceptions of the EU as an effective actor in this field, the EU's perceived leadership role remains high on average when compared with 2015. The significance of *location-specific* factors at play further increases the possibility of EU interventions in this field – more so than in 2015, especially among young cohorts. EU interference in national policies in the field of climate and the environment is more generally viewed as positive even in countries where EU interference in national affairs is not usually welcomed. This demonstrates a perception of increasing room for EU influence, both at a global level and at a national level across the locations.

Energy

Visibility – low, mixed

Similarly to 2015, the visibility of the EU in the issue-area of *energy* remains low, although perceptions of the EU as a global energy actor are gaining increasing attention in the literature. In 2021, only 5% of all thematic coverage in news about the EU in the traditional media sample was dedicated to energy. Social media also pay little attention to this theme. In 2015, Russia dedicated significantly more traditional media coverage to the EU in this issue area than the other countries. In 2021, the greatest amounts of EU press attention on energy come from Russia, China and Indonesia. Other themes, such as climate and the environment, have some effect on the visibility of this theme. Where the EU is visible in relation to energy, it is *EU-specific*, *global-specific* and *location-specific* factors that drive perceptions of the EU in this issue area.

Actorness and effectiveness – active, ranging from cohesive to non-cohesive, partially effective

Students generally consider the EU to be a leader on green and clean energy (China, India, Japan, Russia), and this theme evokes more positive perceptions. Although students regard the EU as falling short on the transfer of knowledge and expertise in green technology (India, Indonesia), the theme of energy functions for them as a means for cooperation. Energy is also considered in the traditional media, but often highlighting contentious moments alongside any potential for cooperation. For example, the Russian media report the EU as having unrealistic ambitions when it comes to renewables, as well as reporting potential collaboration with the EU in the area of hydrogen-based energy. The media in South Africa have published headlines such as ‘Climate change: the solutions might turn out worse than the problem’. Mexico reports on EU actions in this area citing statements from Spain and Portugal regarding energy reform in Mexico and potential legal disputes. Japanese media consider energy as ‘driving a wedge’ in negotiations with the EU over the carbon border adjustment mechanism.

The theme of *energy* is significantly less important to students across all countries in general, apart from in Russia. Where the theme does emerge, it is often in connection to the themes of the *environment and climate change* or *research, science and technology*. Member States do, however, play a crucial role in this perception, and Russian students, for example, recognise gas projects with Germany, Austria and France (as well as the UK), or joint green energy projects.

The EU as a norm-setter – trendsetter, when linked to climate and environment

The EU is referenced as a norm-setter when issues are linked to the theme of *climate and the environment* – for example, on low-carbon energy developments.

Local cognitive resonance – patchy, seen through a geopolitical lens in some locations

The EU is visible in certain cases in this field that are connected to local interests, which in part explains the higher share of interest in Russia. The field of energy is, in some cases, seen through a geopolitical lens. For example, Russian students regard China as a partner of Russia in the field of *energy*, while Chinese students link energy to China’s domestic demand and as a factor that indirectly affects military power.

While the Russian press is enthusiastic about the prospects for Russian companies in the future EU hydrogen energy market, the Nord Stream 2 pipeline remains the key focus of press reports in Russia. In Mexico, press attention mainly focuses on the 2021 Mexican Electricity Bill, which triggered statements by the ambassadors of EU Member States in Mexico regarding its potentially negative effects on competition in the energy market in Mexico.

Continuity and change

EU visibility has increased in the area of energy, although it remains fairly invisible. The theme continues to be driven by connections with other themes such as *climate and the environment*

Research, science and technology

Visibility – low, positive

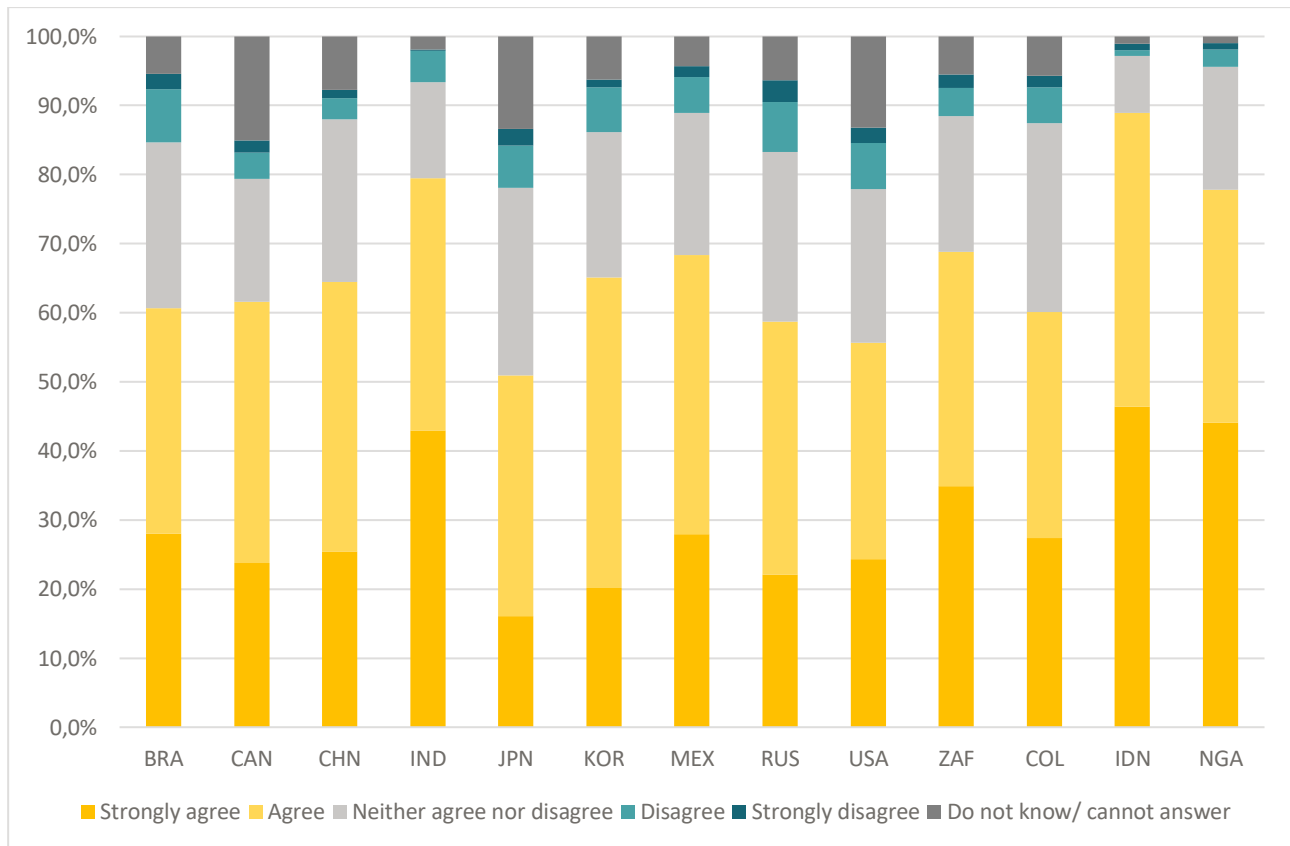
The theme of research, science and technology (RST), maintains a low profile in media coverage (7% of coverage in traditional media, compared with other themes) although it now receives increasing attention in the media compared with 2015. This increase in visibility is mostly driven by *global* and *EU-specific* factors, and is linked to the increasing blending of themes – for example, the COVID-19 pandemic and the higher visibility of themes such as health and the environment and climate, which have an impact on the visibility of research, science and technology. More generally, the EU's visibility on this theme is associated with positive connotations. In both traditional and social media, China has the highest share of news/posts about the EU with regard to this theme among the selected countries. Chinese media reports are positive in relation to EU initiatives promoting technology and innovation, as well as strategic industrial autonomy. The EU is mentioned either neutrally or positively in reference to artificial intelligence and big tech regulation in Canada, China, Japan and the US. However, the theme remains more visible among students than in the media – and even among this group, visibility on average is not high. Among those countries who reflect their interest are Russia, India, China and Brazil.

The visibility of the theme is driven by *location-specific*, *EU-specific* and *global* factors, especially where this theme blends with other themes such as the pandemic.

Actorness and effectiveness – active/ranging from cohesive to non-cohesive/partially effective

The EU's importance in the field of research, science and technology varies between countries and cohorts. EU leadership is recognised in the public opinion surveys in Nigeria, Indonesia, and Brazil (75.1%, 68.8% and 64.9% of respondents respectively consider the EU 'very important' in advancing research and innovation) (Figure 4). EU leadership is considered less relevant in Russia, Japan and South Korea, although this does not reflect a cross-cohort trend. The EU is often seen as less relevant than China in this regard.

FIGURE 4. EU AS A PARTNER IN VARIOUS FIELDS: RESEARCH, SCIENCE AND TECHNOLOGY



Source: Based on the answers to survey Q15: 'Looking from your country's perspective, how strongly do you agree or disagree with each of the following statements about economic relations with the European Union?'

In the traditional media, the share of articles regarding science research and technology is several times smaller than those of the three leading themes – politics, the economy and health. Press articles on the theme of research, science and technology report COVID-19 vaccine-related research and occasionally EU action on the environment and climate change (linking it to the development of new green technology, such as in the Indonesian press).

Compared with 2015, when no knowledge of specific EU projects in the field was recorded, the theme has some local resonance in 2021 among the students and experts interviewed, particularly those who were more knowledgeable about the EU. In India, the EU is seen to deliver advanced research and scientific innovation and regarded as a trendsetter in the development of research, science and technology, and specifically green technologies (overlapping with the climate theme). For Indian students, the theme of research, science and technology is among the top three areas of EU actions that are of greatest relevance to Indian interests. The same is true of Chinese students, who see EU-China cooperation in this field as a priority for China, and perceive it positively. They also point to research, science and technology as being part of politics and military power. In contrast, Russian students link EU achievements in this field more closely with academia (science and research) and health. Lastly, Brazilian students recognise the important of the EU's contribution to research, science and technology, but they also believe that the EU should be more active in this area.

The EU as a norm-setter – trendsetter

The EU is not referenced as a norm-setter with regard to this theme by students, but in India the EU is recognised as a *trendsetter*. However, on social media the EU is considered a norm-setter in terms of COVID-19-related research, particularly in countries that lack research in this field. Furthermore, some of the experts interviewed reference the EU as a normative leader in the field of research, science and technology.

Local cognitive resonance – high, when connected to a research agenda that is of local relevance

Location-specific contexts drive perceptions of the EU in this area, especially when connected with a research agenda that is of local relevance – for example, climate change research in India and automotive technology in China. Generally, ‘local hooks’ increase the visibility of the EU, and partly drive why students in the above locations reference the EU in the context of research, science and technology.

The EU’s role in fighting global climate change is also a persistent theme in the majority of the countries in this study. This is often discussed in connection with research, science and technology, and the possible transfer of green technology from the EU to other countries.

Lastly, when asked whether the EU is an important partner in this sector, the general public acknowledges its role: on average, more than 50% of respondents in all 13 target countries either ‘agree’ or ‘strongly agree’ that the EU is important in research, science and technology (with the lowest number being recorded in Japan – 50.9%).

Continuity and change

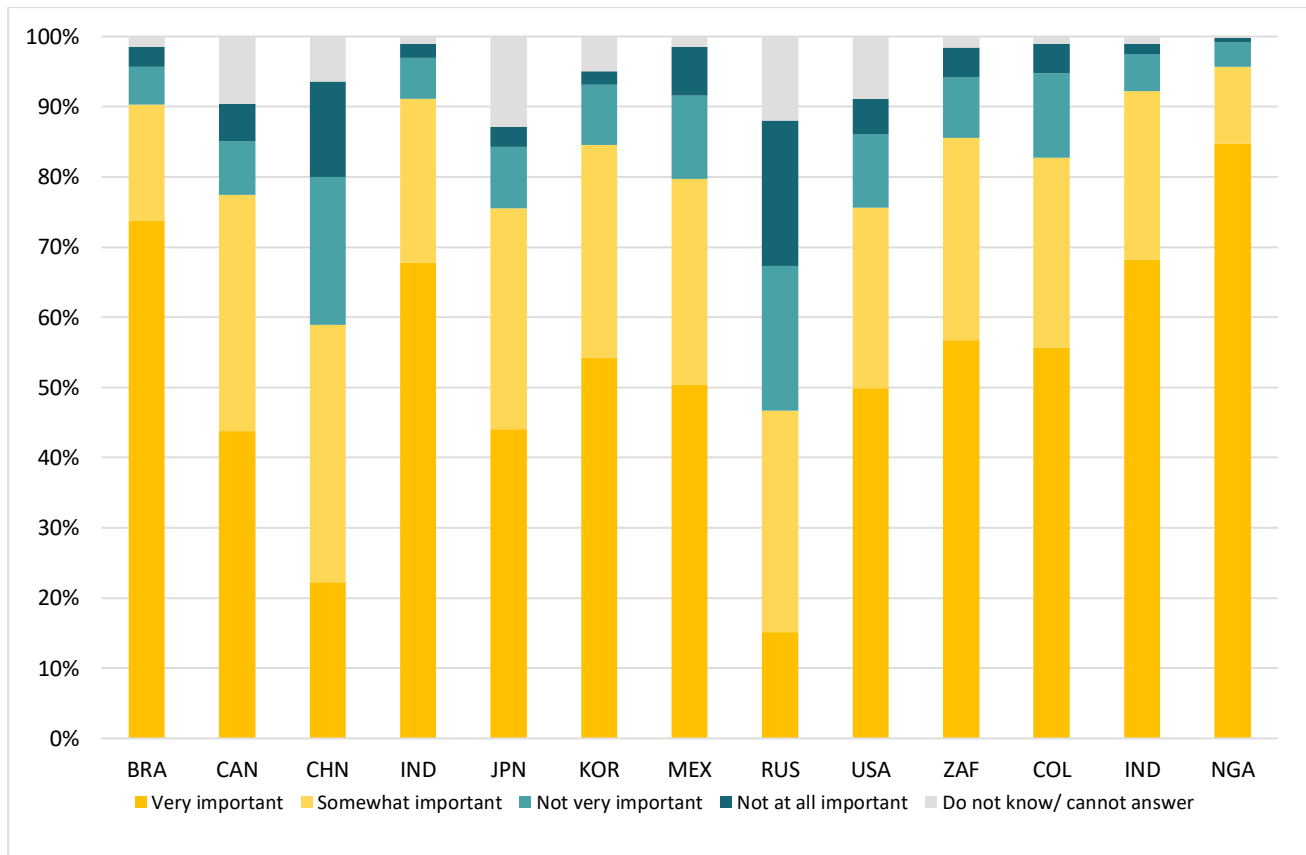
Overall, the EU remains barely visible in relation to this theme, as it was in 2015. However, the visibility of the EU in relation research, science and technology is higher among students than it is in traditional media. This finding is linked to the increasing profile of scientific research that addresses environmental and climate issues, as well as its links to global health. Research, science and technology receives increasing attention in public diplomacy initiatives, and the EU continues to be seen as an important driver of technology and innovation, yet is often seen as losing out to China and the US in this field.

Development and assistance

Visibility – weakest of all themes in the 13 target countries, yet positive

Development is the least visible theme in perceptions of the EU in the traditional media, representing just 2% of the total thematic coverage. The media in China, Nigeria and Colombia pay slightly more attention to the theme of development than the rest of the selected countries. Only in a few countries did interviewees reference it as an important area for bilateral cooperation with the EU (Mexico, Colombia, Brazil, India, Indonesia, Nigeria, China). Here, the EU is perceived very positively – as one of the international leaders, often equal or second to the UN (or the US/China/ASEAN, depending on the region), and with the potential to achieve more. The visibility of EU actions ranges between extremely low (in China) to high (in the other locations listed above). Public opinion poll reveals that the EU is seen as having an important role in the field of providing developing support to eradicate poverty in almost all countries. Higher share of respondents in China and Russia see EU as having insignificant or no role at all in this issue, 35% and 41% respectively (Figure 5).

FIGURE 5. EU IMPORANTANCE IN PROVIDING SUPPORT TO DEVELOPING COUNTRIES



Source: Based on survey Q8: 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?

Actorness and effectiveness – active, cohesive (with some reservations), capable

The perceived actorness and effectiveness of the EU depends on how the country in question perceives its own actorness in this field. The public in the US, China and Russia view their respective countries as more important actors on development. In other countries, experts see potential for cooperation with the EU through bilateral and triangular cooperation, as well as through regional and international organisations. University students also share an expectation that the EU can boost cooperation with their respective countries and increase aid (Mexico, Colombia). Among the perceived problems are a lack of EU solidarity, (e.g. in the EU's provision of COVID-19 vaccines to the Global South), and the perceived asymmetry of bilateral relationships with partner countries. The EU is also sometimes seen as less effective (e.g. *vis-à-vis* the US) given the modest economic impact of its projects on local communities and economies, as well as the lack of a 'bottom-up' approach towards work with local society and support for the programmes of local governments.

According to the general public in Nigeria, Indonesia and India, the EU performs rather well in supporting developing countries. In Russia, South Korea and China, public perceptions of the EU are mostly negative in relation to development.

In general, EU actions with regard to development are seen as overlapping with the broader topics of global solidarity, vaccine support, educational assistance, green technology transfer, and the historic responsibility to address colonialism and inequality. Sometimes, the EU is also seen as competing with other actors such as

China (by focus groups in Japan) (Annex V, the Comparative focus group report). Within the theme of development key intersections are found with the thematic frame of the economy. Trade agreements are seen as a potential booster to discussions on development issues (Mexico); development is also associated with the creation of welfare states, economic capacity and performance (Colombia). EU actions also overlap with the themes of the environment/climate; research, science and technology; and energy – for example, with regard to developmental projects (particularly those relating to green and clean energy). Culture is another important overlapping theme. The colonial legacy and the responsibility of the EU to support developing countries is noted (although not frequently mentioned). Ultimately, social issues, or support for education development globally, social development in terms of equality and diversity, socio-economic equality and climate change activism, are all seen as intersecting with the theme of development.

The EU as a norm-setter – strong and effective

The EU is seen as a *trendsetter* on development, particularly where new technologies and the environment are concerned. There is perceived potential for the EU to advance its normative leadership globally through support to developing countries on governance and development. The EU is perceived as a norm-setter in providing support to developing countries to eradicate poverty and to build a fairer and more stable world, with a special focus on the developing strategic partner countries in our sample, due to European colonial history.

Local cognitive resonance – with a strong 'local hook' and context

While media coverage of the EU in relation to development is limited, when it does take place, it comes with a strong 'local hook', e.g. the EU carrying out specific projects in the locations in focus (economic and infrastructure projects, sustainable agriculture, environmental projects). The EU is regarded as a more effective and capable actors in those locations it aids and/or with which it cooperates. EU assistance overall supports its normative image globally, while specific projects increase its visibility in the locations where they take place.

In Colombia, development-related press materials often profile the relationship of the EU with Colombia on issues with 'local hooks' such as economic projects, sustainable agriculture or ecotourism. Leading media outlets highlight the direct impact of EU actions in the development issue area. In Indonesia, the press covers EU-ASEAN cooperation as a relationship that contributes to the development of countries in the South-Pacific region. Nigerian press reports positively on EU contribution to development, referring to the European Commission and the Head of Delegation making specific announcements with regard to EU public diplomacy initiatives.

Continuity and change

As in 2015, the **EU remains fairly invisible on the theme of development**. According to the general public in the US, China and Russia, the EU lags behind these respective countries as a leader in development. Across all locations, development remains practically invisible in the media coverage of the EU, which also translates into little to no information concerning its effectiveness in this field. However, in contrast to the 2015 study, interviewees in 2021 remark appreciatively on EU assistance. There is an expectation of continuous cooperation in this field, with China becoming a more visible actor with regard to development assistance in certain locations (Nigeria, South Africa).

Social

Visibility – significantly less pronounced compared with the baseline study, positive to mixed

Unlike the 2015 study, **this report includes within the ‘social’ section such issues as migration and education (which were separate themes in 2015) and the internal (social) development of the EU.** In contrast to 2015, when the irregular migration crisis boosted the EU’s visibility in this frame, in 2021, the **EU’s visibility is significantly less pronounced on social issues, and depends on the specific topic concerned.** The social frame occupied 9% of media coverage of the EU in 2021, and is not ranked as a top priority area for cooperation between the EU and its key partners. In 2021, the share of EU press coverage dedicated to social issues decreased overall in comparison to 2015. In 2015, the migration crisis was a ‘hot’ topic for the media; in 2021, traditional media was focusing its attention on a different crisis: COVID-19.

EU performance across social development indicators (*EU-specific* factors) such as quality of life and level of education, culture and lifestyle continue to add to its positive perception among the general public, youth and experts. The EU’s framing in these sectors is also positive in both traditional and social media. Slightly more negative evaluations pertain to *dealing with refugees and displaced people* – a reflection of the migrant crisis, which receives attention in some interviews with youth and experts, although not to the degree it did in 2015 (see the next section). Reactions to the European Council Meeting in 2021 through the lens of social media perceive the EU somewhat negatively, due to the indecisiveness of its leaders and their inability to agree on the necessity of saving the lives of migrants.

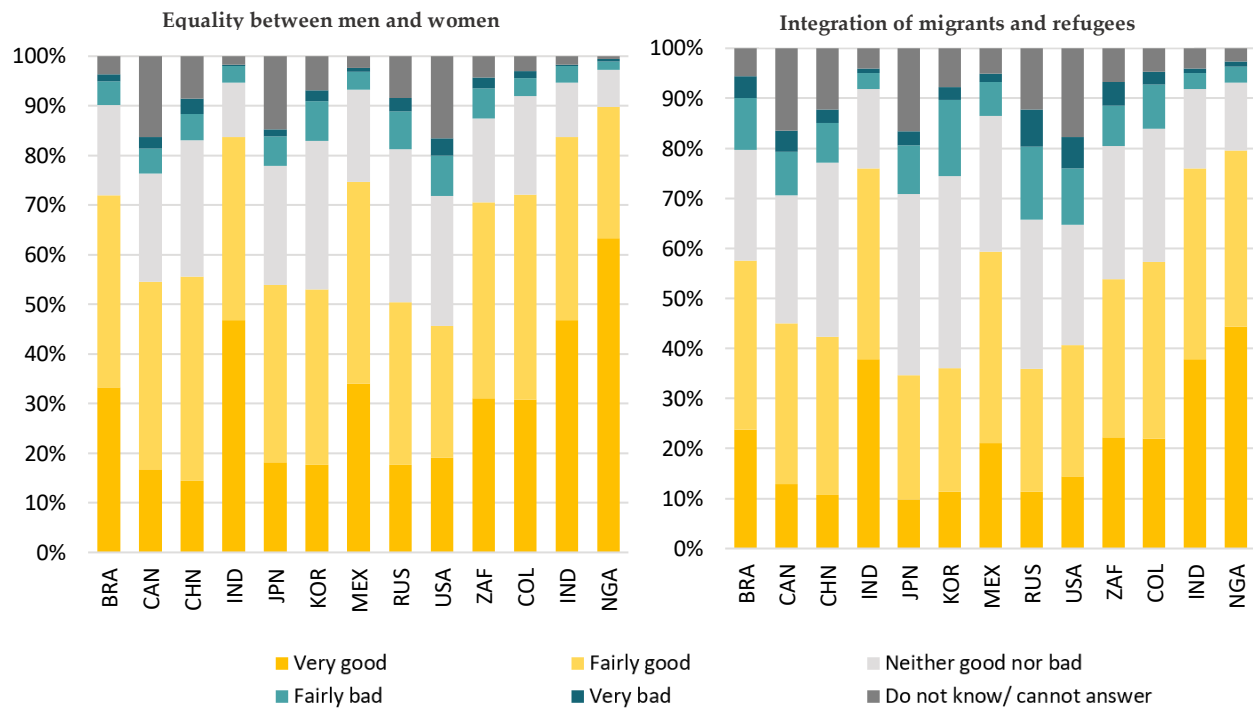
A separate topic within the social issue area is education, where EU initiatives such as Erasmus+, H2020/Horizon and Jean Monnet Chairs, as well as Model EU simulation events, are visible and known to both experts and students, particularly those involved in EU studies (*location-specific*). Experts find education more visible than other social themes and deem that the EU could work more with its key partners on issues other than education-related ones in order to raise its visibility in the social issue area.

Actorness and effectiveness – range according to the sector, from active, cohesive and highly-effective in internal social development and education, to less active, cohesive and effective on migration

The EU continues to be seen as a highly effective and high-performing actor on social indicators across all 13 countries, particularly with regard to the quality of life.

Social development is an area in which perceptions of the EU among the general public tend to **range from positive to mixed** in all 13 key partner countries. In some of the developing countries, such as Nigeria, Indonesia and India, the surveyed public perceives the EU as a very positive example in the field of social development, while the general public in other countries such as the US or Japan perceive the EU somewhat less positively, as the standard of living in those countries is comparable to that of the EU. Quality of life and the level of education are both prominent, positively perceived indicators of social development in the EU. When considering the creation of employment opportunities, survey respondents in Nigeria and Indonesia think about the EU most positively, while perceptions in Japan and South Korea are least positive. EU achievements on climate change activism, social justice and solidarity, and equality between men and women, are seen in a moderately positive light (Figure). **The integration of migrants and refugees appears again among the least positively evaluated areas of the EU’s performance in 2021, as it did in 2015.** Furthermore, reducing income equality, eradicating poverty and the protection of minorities are the fields in which, according to the polls, the EU is considered to perform relatively poorly.

FIGURE 6. EU PERFORMANCE IN THE FIELD OF SOCIAL DEVELOPMENT: EQUALITY BETWEEN MEN AND WOMEN (LEFT) AND INTEGRATION OF MIGRANTS AND REFUGEES (RIGHT)



Source: Based on survey Q18_6. “Equality between men and women: Generally speaking, how good or bad do you think the European Union performs in each of the following areas of social development?” and Q18_10. “Integration of migrants and refugees: Generally speaking, how good or bad do you think the European Union performs in each of the following areas of social development?”.

In all 13 countries, the EU is seen as an important partner for education exchange. The general public in Nigeria, Indonesia and India perceive the EU as an important partner in the field of education, less so in Russia and Japan, despite positive perceptions of the EU in relation to education exchange. This is also confirmed by students. Across all locations, they give special consideration to the EU in the context of education and higher education. This is perhaps unsurprising, given the sample of university students. Education attracts fewer negative perceptions more generally, is more visible than other areas of EU activity, and enjoys stronger engagement. Students tend to reflect on the opportunities that the EU offers in general and to them personally. Scholarships (and Erasmus+ scholarships in particular) are mentioned most frequently. Students in Mexico, Colombia and South Korea called upon the EU to increase the number of scholarships to study in Europe. South Korean students, who perceive European education as advanced, also expect discounts based on their international student ID cards during exchanges in Europe, although only one respondent there actively recalled educational programmes such as Erasmus+ and Horizon 2020. Canadian students also mentioned study tours and Erasmus+, but considered such educational opportunities to be little known by their peers (Annex V).

Several intersections exist between social themes and other themes reviewed in this study. First, the EU is deemed capable of achieving more as an international actor, including resolving the social problems of third countries and, thus, development. The EU is also seen to carry an important role in funding education programmes. Second, we also note an intersection with the issue area of culture, due to the lifestyle in EU countries receiving positive evaluations among the general public. Third, we note an intersection with the theme of research, science and technology. As mentioned earlier, education exchanges and innovation receive

positive evaluations among youth, experts and the general public. Lastly, we note an intersection with the theme of politics, and with the EU's internal politics. However, evaluations of the EU with regard to this issue are somewhat negative. The EU is perceived as lacking cohesiveness and solidarity on the areas of migration and democratic backsliding, including growing xenophobia, far-right mobilisation and radical rhetoric. Interviewees point out that the EU is a less cohesive and effective actor when it comes to negotiating issues of national sovereignty with its Member States such as migration and security – a situation that is reflected in its normative image.

The EU as a norm-setter – strong (apart from in the field of migration), yet ineffective

Perceptions of the EU here are **mixed and vary among countries according to the issue in focus**. On the one hand, the EU is seen as a norm-setter on development, the welfare state and education (the Bologna process), as well as a role model for promoting gender equality, the protection of minorities and human rights more broadly. For example, the results of the public opinion surveys show highly positive attitudes towards the EU **in terms of equality between women and men** in Nigeria, Indonesia and India.

On the other hand, youth see the EU as having problems with human rights violations inside the bloc ('new' Member States such as Poland and Hungary, e.g. with regard to the protection of minorities, including LGBTI+ people and migrants, and managing cultural diversity) as well as other challenges such as social inequality and the eradication of poverty. This leads to a perception of 'double standards' and hypocrisy on the part of the EU (see also the section on 'Politics'). More action is expected from the EU with regard to the protection of minorities and gender equality – both within the EU and externally.

Local cognitive resonance - resonates with the local public as a benchmark to follow

EU-specific factors (performance in social welfare indicators) maintain the attractiveness of the EU to its external partners and its normative image. In cases where this normativity is seen as threatened, this leads to more negative perceptions of the EU. Overall, **the EU's normative image resonates with the local public as a benchmark to follow**. In this context, the EU is regarded as a partner for potential cooperation on social and education affairs that could benefit the locations in question if it were to do more. The EU is also seen as being capable of achieving more as an international actor on social issues. *Location-specific* factors present a more complex picture in which perceptions vary from country to country. For instance, in Indonesia, the media often present certain issues in EU-Indonesia relations such as trade or environmental problems as reflecting on human rights, democracy and social solidarity. Due to its widespread impact in Indonesia, the export of palm oil and the EU's ban on it features in various thematic frames, including social – due to the impact on jobs and employment. In Nigeria, the EU is visible in relation to social justice and gender equality, especially due to its campaigns against gender-based violence. The Russian press points to double standards regarding the human rights situation within the EU itself, linking it to social (in)equality.

Continuity and change

The EU continues to be perceived a role model on the welfare state, development and education. In 2021, perceptions of the EU's performance across social indicators have improved even in comparison to 2015. Also, the extremely negative impact on the EU's image of the migrant crisis is not as vivid and detrimental as it was back then. Perceptions of the EU's treatment of migrants have slightly improved in comparison to 2015, but together with other challenges faced by the EU, such as democratic backsliding, which affects various social aspects, the migrant crisis still affects the perceived normativity of the EU and taints its image.

Culture

Visibility – weak (for the EU) vs. strong (for Europe); positive

In traditional media, *culture* is fifth most widely covered theme relating to the of the EU, accounting for 8% of total media coverage. The media in South Korea, Japan, China and Russia report on this theme several times more often than in other countries. On social media, Japan and South Korea stand out in terms of volume, but culture does not profile in media coverage with the EU's heightened visibility. Overall, the media and social media continue to associate *culture* – and *sports* – with Europe as a whole rather than with the EU specifically. Due to the higher visibility of Europe in this area, individual EU Member States are also more visible, and their visibility is dependent on historical context, cultural and family ties that exist between such countries and the locations in focus (e.g. Portugal, Italy in relation to Brazil; Spain in relation to Colombia and Mexico, etc.). Perceptions of Europe/the EU in the areas of *culture* and *sports* are positive (with certain reservations regarding colonialism and migration). Visibility of the EU's public diplomacy initiatives in these areas among experts and students ranges from high (Brazil, Russia) to extremely low (the US, Canada, Colombia, Japan). The general public in all of the countries studied do not associate the EU with culture more broadly, and initiatives in this issue area by specific EU Member States are more widely known and visible.

Actorness and effectiveness – inactive/cohesive/capable

In the issue area of culture, the key indicator of perceptions of the EU is its attractiveness, which is high for most of the locations in question. The exceptions to this are those countries in which the public find their own culture more attractive than that of the EU (India, Japan; in the same locations, the US is seen as more attractive than the EU).

According to the public opinion survey, across all 13 countries, **the attractiveness of culture and lifestyle in the EU is high**. Evaluations range from 90% of assessments in Nigeria being 'very good' or 'fairly good', to a corresponding figure of 57% in Japan. Among the 13 countries in the sample, the public in the US and Japan perceive the EU least positively, possibly because these audiences also regard their own cultures as highly attractive.

The EU is appreciated for its monuments and museums, history, food and cuisine, lifestyle, luxury goods and clothes, and the arts. Lifestyle, food and clothing in particular appeal more to youth, and the EU's performance in tourism ranks highly as well (ranging from 92% of evaluations in Indonesia being 'very good' or 'fairly good' to a corresponding figure of 57% in Japan). Somewhat less positively perceived is the EU's implementation of multiculturalism – a reflection of the migrant crisis, highly visible in 2015. There is also a perceived lack of so-called 'EU culture' to which people might connect, rather than to that of individual Member States or to European culture more broadly. European colonialism negatively affects perceptions of the EU in certain locations (Nigeria, South Africa, Brazil), but not all (no negative impact in Indonesia).

Across all of the countries and sub-themes, **the EU is perceived as performing exceptionally by the surveyed public**. Music, art, theatre and cinema, monuments and museums, history, modern architecture and design, luxury goods and clothes, food and cuisine, lifestyle, sport and multiculturalism are all prominent indicators of the perceptions of the EU in terms of culture. For instance, EU performance in the arts receives positive evaluations from between 92% (Indonesia and Nigeria) and 63% (Japan) of respondents in surveys. Across the countries, students also recognise cultural activities, such as film festivals (Indonesia, Russia). More generally, however, students connect the theme of culture to individual EU Member States rather than to the EU as a whole (Brazil, Indonesia). Brazilian students hold positive opinions regarding EU Member States' financing of cultural projects and initiatives through the Goethe Institute, Alliance Française, Instituto Cervantes and

Heinrich Böll Stiftung. However, together with their Colombian peers, they find EU activities in relation to this theme deficient.

In contrast, Chinese students find culture the least important issue in the context of EU-China cooperation. They think that the EU and China are too different in cultural terms to influence each other through such means. Culture also evokes a mixed reaction among Nigerian and South African students, who deem it to be less important than other themes such as politics and health and which are also tied to negative views on colonialism and power dynamics between the Global North and the Global South.

Key intersections with other themes reviewed in this study relate primarily to social issues. Migration, managing diversity and multiculturalism received negative feedback. The second intersection concerns politics. While this intersection is fairly minor, it relates to statements by celebrities on political issues (in South Korea). Lastly, in Russia, culture is seen as a 'safer' common ground on which to link to the EU, as it is not regarded as a politicised theme.

The EU as a norm-setter – strong, capable

The EU is perceived as performing well in culture and sports, which adds to its normative image. Europe is often seen as having defined Western culture in general, and is thus seen a norm-setter in this area. However, this does not make the EU more attractive by default to those countries which find their own culture superior.

Local cognitive resonance – colonial legacies add to the negative framing of the EU; cultural heritage and family ties lead to the opposite

Location-specific factors dominate in this issue-area. While colonial legacies add to the negative framing of the EU, cultural heritage and family ties lead to the opposite. Family ties and common values are mentioned as positive aspects – a 'glue', even in the context of declining economic relevance (Brazil). The situation is different among those locations that do not associate themselves with Western culture in general (India, Japan). Across all locations, there is perceived potential for cooperation with the EU in the cultural sector, and scope for the EU to increase its visibility in this issue-area.

Continuity and change

As in 2015, culture remains associated with Europe and individual Member States rather than with the EU, despite the fact that it attracts a positive emotive charge for the EU as well. Perceptions of the EU in this issue area are driven by *location-specific* factors, and while culture is still regarded as an area for potential productive cooperation, the 2021 Study only registers increased visibility in this area for the EU and its Member States in few countries (Brazil, Russia).

Health

Visibility – strong; negative to mixed

In contrast to the 2015 Study, in which health was seen as part of the social thematic frame and overshadowed by migration, in 2021 the COVID-19 pandemic has significantly increased the EU's visibility in this issue area. Health is third most widely covered thematic frame in traditional and social media; however, neither youth nor experts rank health as a top area for cooperation between the EU and their country.

Global and *EU-specific* factors prompt relatively neutral responses/coverage of EU actions on health, while *location-specific* factors (ban on vaccine exports; vaccine certification) trigger a strong – often negative –

emotional charge. Traditional media frame EU actions negatively when reporting on the EU's handling of the pandemic inside the EU, as well as with regard to restrictions on vaccine exports. Attitudes on social media are even more negative. Other issues such as securing vaccine supply, vaccine safety (restrictions on the use of AstraZeneca), the introduction of vaccine passports for travel, and the certification of vaccines in the EU, receive neutral to mixed evaluations (with the exception of Russian and Chinese media). Youth and experts reveal negative attitudes when the interests of their countries are concerned (ban on vaccine exports), but are more neutral with regard to the EU's internal situation.

The visibility of EU institutions and officials correlates with the profile of the topic in focus. For instance, negotiations on vaccine supplies and vaccine certification have led to the European Medical Agency (EMA) becoming more visible during the observation period. The European Commission is referenced as a collegial organ carrying out decisions for the EU. Individual Member States are mentioned in the context of the handling of the pandemic: Germany and France (in relation to lockdowns); Hungary, for administering the non-EMA approved Sputnik V vaccine. In relation to the fight against the pandemic and related regulations, health appears to be associated more with the EU than with Europe.

Perceptions of the EU in this issue area are also dynamic. In the media, the negative framing of the EU's ban on vaccine exports gave way to neutral to positive framing when the EU lifted the ban to assist its partners (Japan, South Korea, Indonesia). Another example is the EU's support for the TRIPS waiver (India). In a similar vein, focus group participants expressed hope and desire for the EU to help developing countries with vaccine supply (Brazil), even though these opinions are often based on disappointment with the EU's performance so far. Lastly, perceptions of the EU among the general public do not appear to be strongly affected by the EU's actions during the pandemic (see next section).

Actorness and effectiveness – ranging from inactive/non-cohesive/non-effective to more capable and coping

According to the survey, the public find that the EU performs well in medical research and even on global health. While responses with regard to global health were more mixed and ambiguous and included fewer positive evaluations compared with other fields of performance, the share of respondents who believed that the EU's performance is 'fairly bad' or 'very bad' in this field does not exceed 6% in any of the countries included in the sample.

In terms of both global health and medical research, the public finds the EU to be performing very well. With regard to global health, positive evaluations among the respondents range from 97% of respondents in Nigeria ranking it as 'very good' or 'fairly good', compared with 47% in Japan. Negative evaluations range between 11% ('very bad' or 'fairly bad') in South Korea to less than 1% in Nigeria. The public in Japan and South Korea appear more reserved regarding EU performance in the issue area of health – a trend identified in the literature review and confirmed by the survey results. Furthermore, while respondents in Nigeria, Indonesia or India perceive the EU as setting a very good example on health, participants from other countries such as the US, Canada or Russia evaluate the EU positively to a lesser extent.

Among interviewees, perceptions of the EU's actorness and effectiveness in handling the pandemic were more mixed. Some see the EU's slow vaccine roll-out as yet another sign of the EU struggling to act decisively and in a united manner during crises. The media also capture internal divisions between EU Member States in the course of vaccine procurement and the implementation of lockdown restrictions. The EU-UK 'vaccine war' is another issue here. Yet on the other hand, the EU's progress in vaccine roll-out advances perceptions of that it has regained its cohesiveness and resilience in coping with crises. This more positive outlook also correlates with the expectation that the EU will assist other countries (including the countries of the interviewees) in coping with the pandemic. Here, negative attitudes largely stem from the perception that the EU has not yet

done so. Lastly, the EU's performance is often compared against that of the locations in question. Where its performance is deemed to be better, it is seen as a more effective actor. Overall, the EU is seen as a capable actor that has probably not fully realised its potential.

Perceptions of the EU with regard to health intersect with a number of other themes. In relation to research, science and technology, scientific discoveries in the medical sector, vaccine certification and production, as well as technical aspects of dealing with the pandemic, received neutral to positive evaluations and increased the EU's visibility. Some interviews revealed that the broader public does not know much about EU's achievements in this area (India, Canada); other interviewees see potential for the EU to become a global leader in medical research and public health cooperation (India, South Korea). Furthermore, the impact of the pandemic on the EU's economy (evaluated negatively) correlates with the expectation that the EU's progress in vaccination will induce economic recovery and advance the global economic recovery post-pandemic (US, China) (see also the section on 'Economy').

The impact of the pandemic is also linked to social issues. In a broader context, health is associated positively with social development (Indonesia), reduction of poverty, civil rights and stability within the EU (Colombia). The press in Colombia and South Korea reports on the Digital Green Pass/COVID-19 Vaccine Passport as a public health management policy innovation. Perceptions of the EU in the issue area of health are also connected to culture and more specifically neo-colonial sentiment (Nigeria, Brazil and South Africa). One Nigerian student labelled Africa's access to vaccines as 'vaccine apartheid'. Lastly, the EMA's decision not to certify Chinese and Russian vaccines is framed in Russia and China as a political decision, linked by the EU to human rights violations in these countries (see also the section on 'Politics').

The EU as a norm-setter – weakened/ineffective

The EU is seen as a norm-setter with regard to healthcare in general, but EU actions during the pandemic are perceived extremely negatively and as a blow to its normative role: the ban on vaccine exports was seen as a sign of the erosion of the EU as a normative power (Mexico). COVID-19-related press reports under the generic banner of 'vaccine nationalism' have undermined the EU's image as a responsible international actor. On the other hand, and in line with the survey findings, EU statements and progress on vaccination are seen as guidelines for coping with the pandemic (Colombia), or even as a benchmark for other countries to follow (South Korea). The EU's digital vaccination passport policy is reported in certain countries as a possible model to be implemented overseas. Meanwhile, on social media, various sources state that the EU urges a global vaccination plan, and that its role in this is necessary. Therefore, the EU remains a norm-setter in health, albeit one with a dented image.

Local cognitive resonance – strong and negative where actions affect the handling of the pandemic in the location in question; strong and positive where the EU is helping to fight COVID-19 in the country

The COVID-19 pandemic acts as a *global* factor, but its impact on perceptions of the EU is based on *location-specific* and *EU-specific* factors. In the context of *location-specific factors*, perceptions of the EU depend on whether it meets local demand for vaccine supply, as well as attitudes to vaccine certification and travel regulations (Digital Green Pass/COVID-19 Vaccine Passport). The press predominantly reports on the EU's ban on vaccine exports as a theme with strong local resonance, and is particularly visible in the Japanese media. Local outlets have continuously reported on high-level contacts between the EU and Japanese officials to establish a supply of European vaccine to Japan. In contrast, the press in Russia and China report negatively on the EU's unwillingness to register Russian and Chinese vaccines. The media in South Korea and the US focus on the EU's vaccine procurement and on the digital vaccination passport – either as a model to be considered for emulation, or a factor affecting the travel/mobility of their citizens.

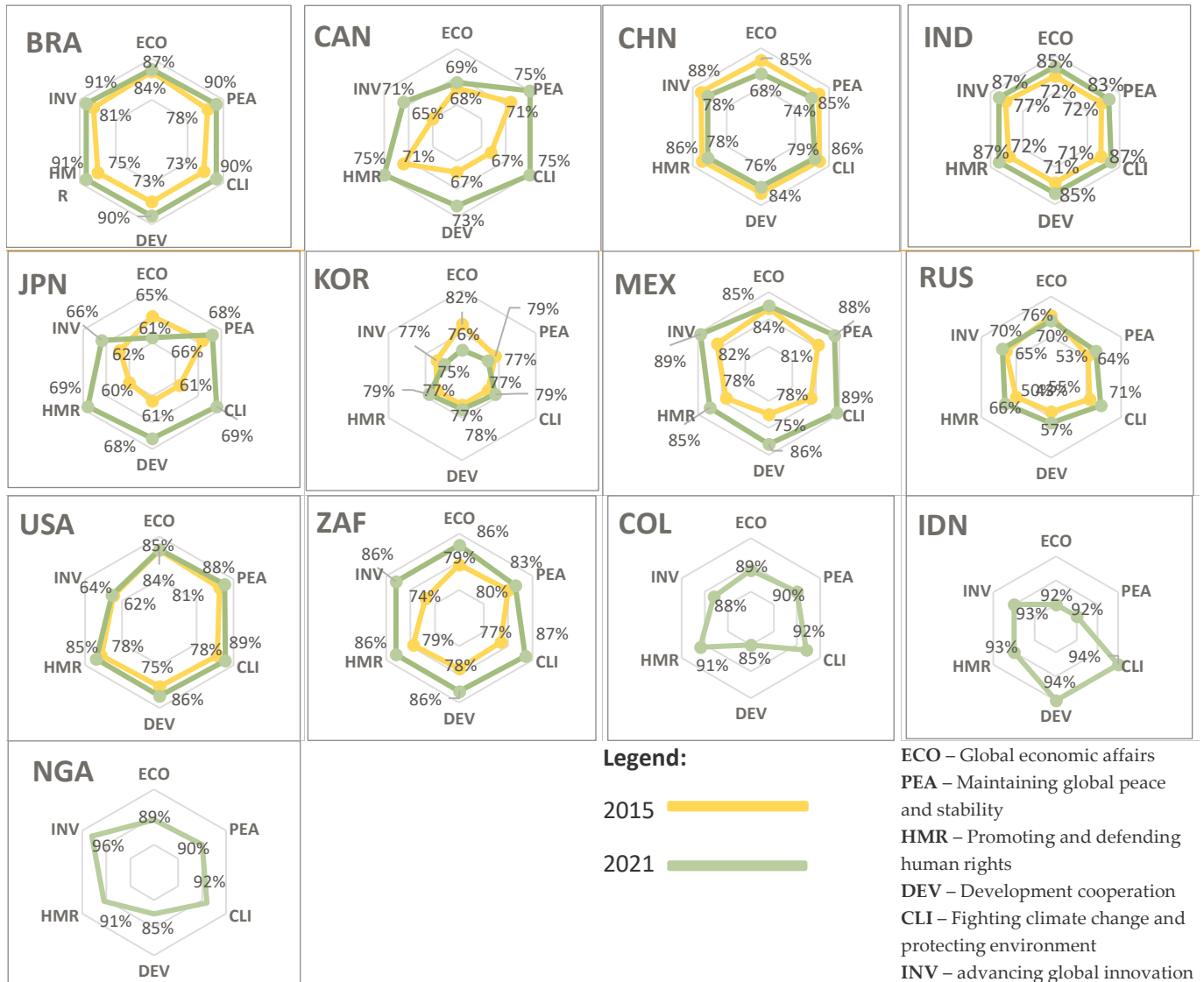
In the context of *EU-specific factors*, the EU's handling of the pandemic and perceptions regarding cohesion among its Member States determine whether or not it is seen as a capable and effective actor. Here, the EU's internal discord regarding vaccine procurement is framed extremely negative as 'chaos'.

Continuity and change

The COVID-19 pandemic is seen as one among many crises facing the EU, including Brexit, the migrant crisis and the Eurozone crises. While in 2015, the migration crisis grew into a separate, visible theme within the social frame, in 2021 it is the COVID-19 pandemic and health that does so. As in 2015, the EU is seen as a role model, capable of aiding its own population and having the capacity to be a global leader on health care in general (an area in which the EU is seen as performing better than the countries in question). This image has been marred somewhat by the global pandemic and two by sets of factors: *EU-specific* (lack of unity and strategy for coping with the crisis) and *location-specific* (ban on vaccine exports; vaccine certification). In certain locations where health care was seen as a potential area for cooperation in 2015, this perception has remained (India, South Korea, Canada); in others, perceptions have been changed over the course of the pandemic (China, Russia, South Africa). The EU is still largely seen as having the potential to be an international leader in the health sector, but its ability to communicate its policies is being questioned.

Overall, opinion regarding the EU's global importance in various areas is high among participants in all 13 countries. It has improved in 2021 compared with 2015 in most countries, with exception of Korea and China (Figure 7).

FIGURE 7. OPINION OF THE EU'S GLOBAL IMPORTANCE IN DIFFERENT AREAS



Source: Prepared by the Core Team based on answers to survey questions Q 6-11 (2015) Q 6-8, 10-12 (2021). 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 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]’. The percentages represent the share of respondents in each country who think that the EU is ‘Very important’ or ‘Somewhat important’ in the given area.

Main findings on the EU vs. Europe

4.1. Introduction

Drawing on the insights from the quantitative components of this study – the *traditional media analysis*, *social media analysis* and *public opinion poll* – we identify several differences and commonalities in perceptions of the EU *vis-à-vis* Europe.

Both *traditional* and *social media analyses* show that the visibility of EU in these media sources has increased considerably. Non-existent in 2015, the **COVID-19 crisis has become the primary factor in EU and European visibility** across the 13 target countries in 2021. The pandemic is seen as impacting the *political and economic* choices of EU leaders and EU Member States, and the *experiences of European people*. This marks a difference from the 2015 Baseline Study, in which the Eurozone crisis was the most widely discussed topic. **Germany and France remain the most visible countries among the EU Member States** (with high visibility of their respective leaders), while the smaller states receive much lower visibility.

In a mark of continuity with the 2015 Baseline Study, Europe is usually viewed as a **geographical marker**, while the EU is regarded as an **economic and political actor**. This explains why the thematic frames of *politics* and *economy* are most often connected with the EU. *Culture and sports*, on the other hand, are linked to the notion of Europe in all of the countries included in the sample.

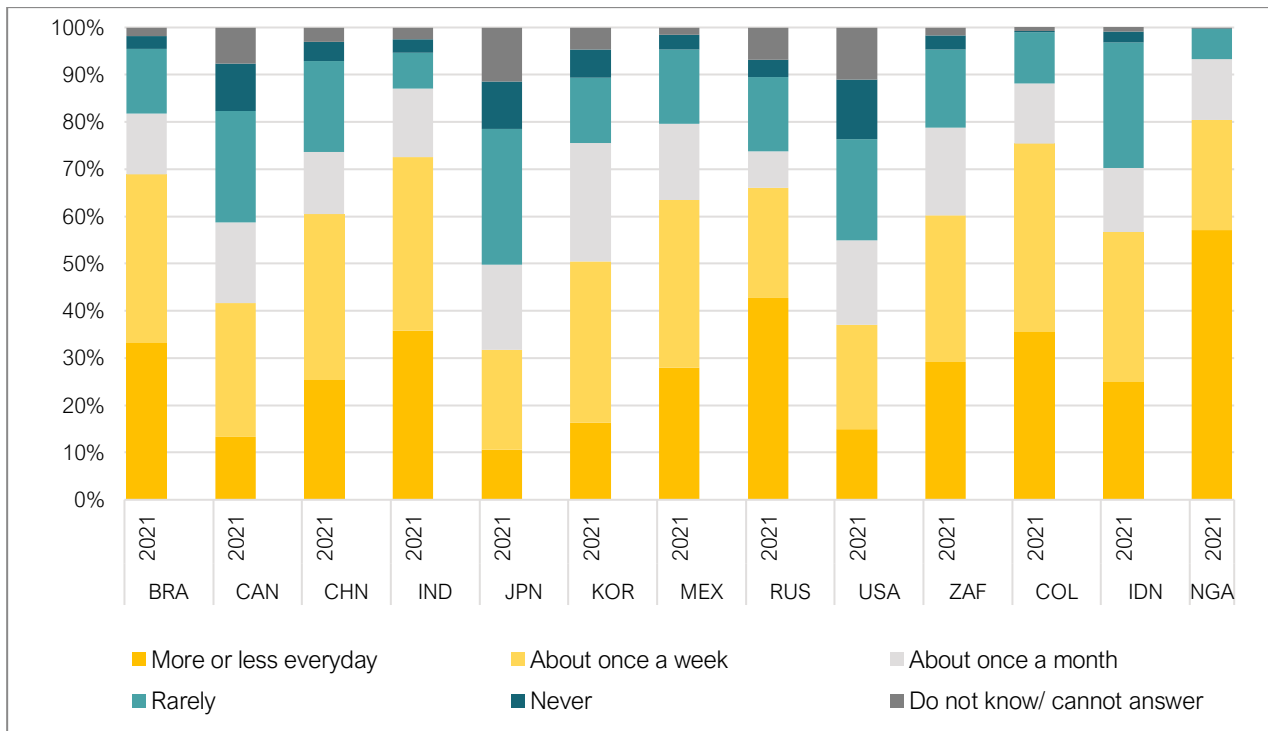
This section discusses the main findings regarding the visibility of the EU vs. Europe. It then moves on to discuss how EU vs. European actorness is perceived across thematic frames. Lastly, it discusses emotional charge.

4.2. Main findings on EU vs. Europe

4.2.1. Visibility

The visibility of the EU has **increased over time** in almost all countries that participated in the 2015 Baseline Study, except for South Korea and China, where it remained stable (Figure 8).

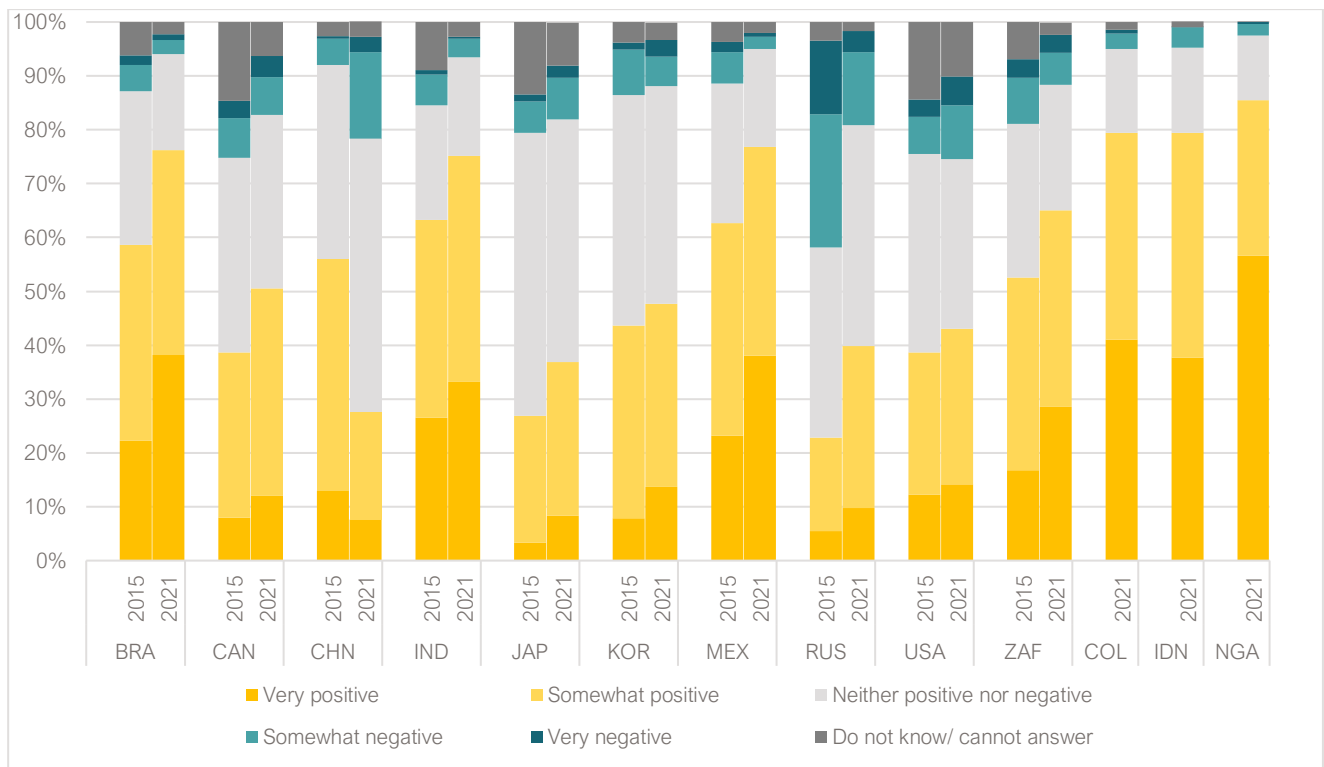
FIGURE 8. FREQUENCY WITH WHICH REpondENTS HEAR OR READ ABOUT THE EU



Source: Based on answers to survey Q27: ‘Generally, how often, if ever, do you hear or read about the EU?’.

As in the 2015 survey of the general public, in 2021 the EU is one of the actors most positively assessed by respondents from the most of the original 10 countries, in comparison to the other actors listed. The EU usually occupies one of the top four positions, along with the US and Japan, or sometimes the respondents’ own country. The publics most negative towards the EU were in China, the US and Russia (Figure 9). Even so, in China and the US, the EU comes 3rd out of eight in terms of positive views; in Russia it comes 4th.

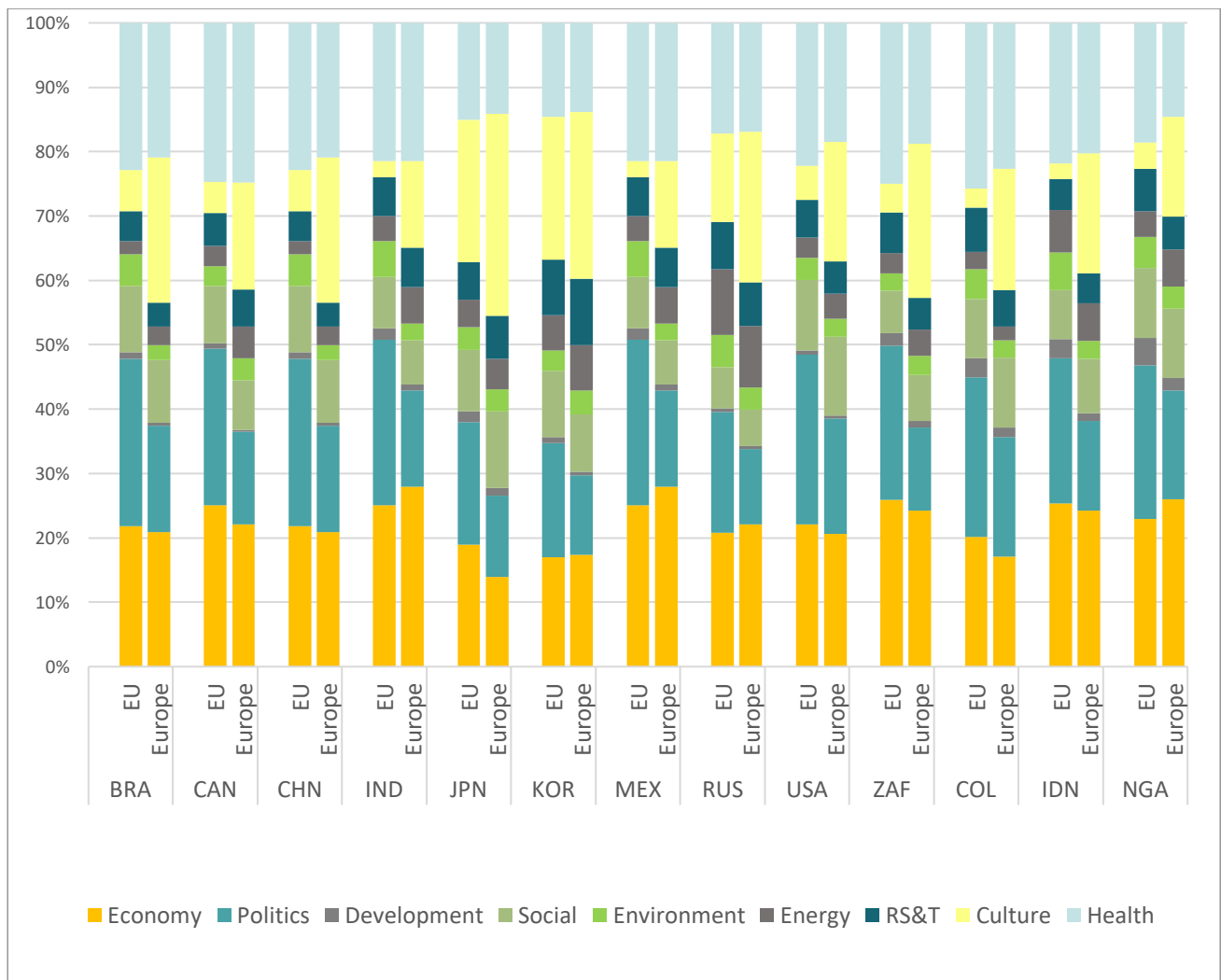
FIGURE 9. GENERAL OPINIONS ABOUT THE EU



Source: Based on answers to survey Q1: ‘Generally speaking, please indicate how positive or negative you feel about each of the following countries and organisations?’.

Compared with the 2015 Baseline Study, the *traditional media analysis* in 2021 identified a **large increase** in the volume of articles published each month that cover Europe. Often, however, the same increase was not seen in relation to articles about the EU. For instance, in India, compared with the 2015 Baseline Study, the volume of press publications referencing **Europe** had **grown** by 2.4 times, in Brazil it had grown threefold, and in South Africa by 4.5 times. News coverage containing references to Europe had doubled in Canada and increased sixfold in the US. In Mexico, the volume of publications concerning the EU decreased by 30% compared with the 2015 Baseline Study, in contrast to an almost threefold increase in news referencing Europe. Similarly to the 2015 Baseline Study, portrayals of Europe are much more visible than those concerning the EU in relation to cultural affairs (a 20% share of thematic coverage in the ‘Europe’ dataset versus 8% share in the ‘EU’ dataset). Europe is seen as a centre for cultural attractions (high-quality entertainment, art, architecture, music, sports, etc.) (Figure 10).

FIGURE 10. THEMATIC COVERAGE OF THE EU AND EUROPE IN TRADITIONAL MEDIA



Source: Prepared by the Core Team, based on quantitative media analysis. One article can be coded as reflecting more than one theme.

The global pandemic has also contributed to heightened visibility of the EU because, in times of global crisis, macro labels are more useful for identifying the ‘other’; therefore the tendency to mention Europe in geographical terms is more prevalent in reports. Europe has gained heightened attention in 2021 due to the EU’s handling of the COVID-19 pandemic in general, and vaccine roll-out plans and the EU Digital COVID-19 certificate in particular. Health is the third most popular thematic frame in the ‘Europe’ dataset, which further explains its heightened visibility (Table 13). The tendency towards a higher output of Europe-related articles in prestigious media outlets was registered in seven out of 10 original partner countries. In contrast, business-related newspapers saw the decline in news output in seven out of the 10 countries. At the same time, the 2021 Update Study also observed a **noticeable increase in coverage** in terms of both EU- and Europe-related articles in the selected countries overall, its extent varied between countries. Although the overall **increase** in EU news coverage across all 13 target countries amounted 30%, no significant changes were registered in Japan, China or Russia. No pattern was identified with regard to prestigious or business-related newspapers. In the 2015 Baseline Study, an average of 35% of news from outlets in partner countries depicted the EU in a central manner. In 2021,

the corresponding figure was 18.8%. EU-centric articles are considered those in which a high degree of intensity is assigned to representations of the EU and its institutions and policies.⁴⁶

TABLE 13. THE THREE MOST VISIBLE THEMES IN TRADITIONAL MEDIA COVERAGE OF THE EU AND EUROPE

Rank	EU						EUROPE					
	2015			2021			2015			2021		
	1	2	3	1	2	3	1	2	3	1	2	3
Brazil	ECO	POL	S&C	POL	HLTH	ECO	ECO	S&C	POL	S&C	HLTH	ECO
Canada	ECO	POL	S&C	ECO	HLTH	POL	ECO	S&C	POL	HLTH	ECO	S&C
China	ECO	POL	S&C	ECO	POL	HLTH	ECO	S&C	POL	ECO	POL	ENR
Colombia	N/A	N/A	N/A	HLTH	POL	ECO	N/A	N/A	N/A	HLTH	S&C	POL
India	ECO	POL	S&C	POL	ECO	HLTH	ECO	S&C	POL	ECO	HLTH	POL
Indonesia	N/A	N/A	N/A	ECO	POL	HLTH	N/A	N/A	N/A	ECO	S&C	HLTH
Japan	POL	ECO	NOR	S&C	POL	HLTH	ECO	S&C	POL	S&C	HLTH	ECO
Mexico	POL	ECO	S&C	POL	ECO	HLTH	ECO	S&C	POL	ECO	HLTH	POL
Nigeria	N/A	N/A	N/A	POL	ECO	HLTH	N/A	N/A	N/A	S&C	ECO	POL
Russia	ECO	POL	ENR	ECO	POL	HLTH	S&C	ECO	POL	S&C	ECO	HLTH
South Africa	ECO	POL	S&C	ECO	HLTH	POL	ECO	S&C	POL	ECO	S&C	HLTH
South Korea	ECO	POL	S&C	S&C	POL	ECO	ECO	S&C	POL	S&C	ECO	HLTH
USA	POL	ECO	S&C	POL	HLTH	ECO	POL	ECO	S&C	ECO	S&C	HLTH
Legend		POL	Politics			ECO	Economy			ENR	Energy	
		S&C	Society& Culture			NOR	Normative			HLTH	Health	

Source: Prepared by the Core Team, based on quantitative media analysis data.

The frequency of references to the EU and Europe in the *social media analysis* reveals similar trends. In the US and Russia, the EU is referenced more frequently than Europe, while the opposite is true among the samples from the other 11 target countries. For the US and Russia, the most visible framing of the EU on social media is largely

⁴⁶ Company coding is applied with the Factiva toolkit using extraction technology. This analyses a predetermined amount of text and extracts those text strings identified as concerning EU institutions, which are then compared with contextual information in the article. The Factiva toolkit library only contains the names of institutions and companies as filters ready for analysis; therefore, for the 'Europe' dataset, which uses the keywords 'Europe', 'European' and 'Europeans', it was not possible to measure centrality.

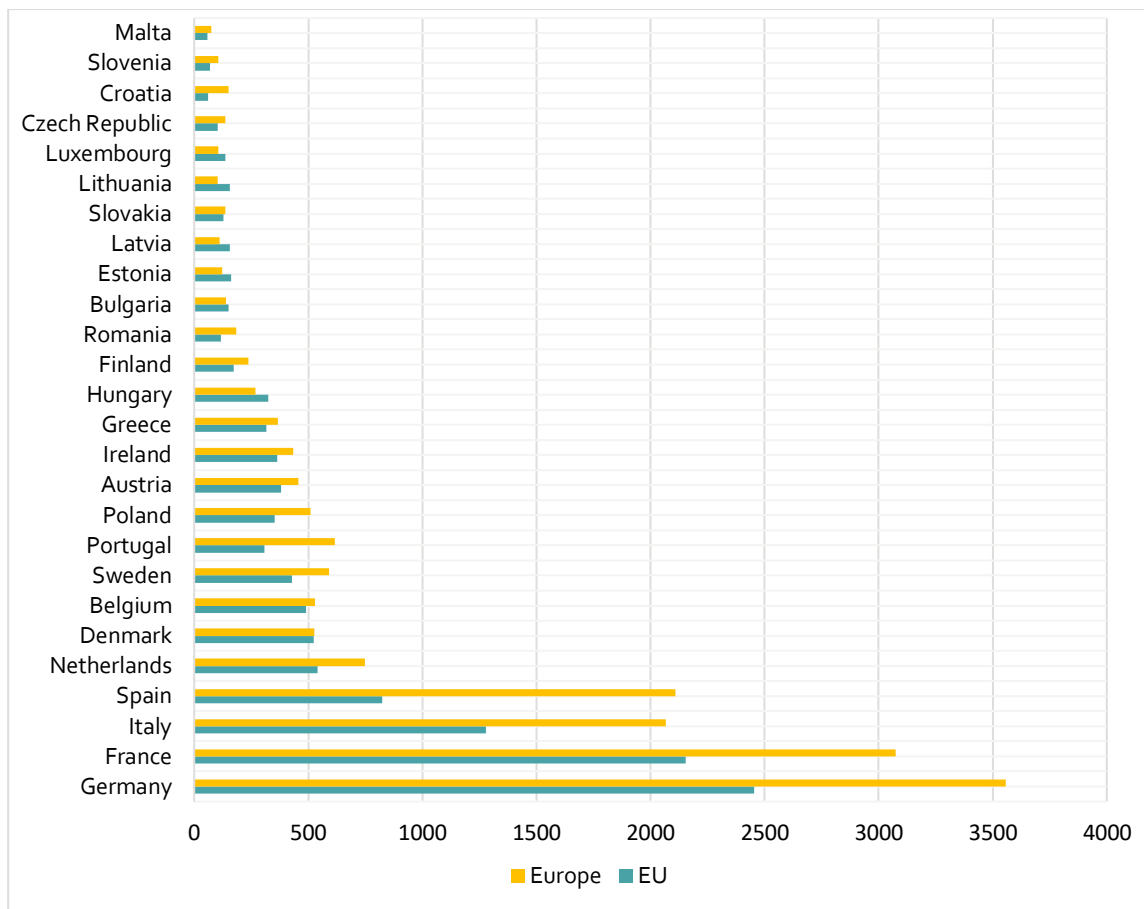
as a **political entity** (corroborated by the findings in the next section of this chapter). **Culture and sports**, on the other hand, are more often mentioned in relation to Europe in other locations. This is explained by the fact that Europe is most often viewed as a **geographical marker**, while the EU is seen as an **economic and political actor**.

As revealed by the *traditional media analysis*, in most of the countries in this study, the **volume of Europe-related articles is larger than that of EU-related articles across every thematic frame**. However, there are some exceptions. In the Chinese press, the number of articles relating to the EU and Europe is almost equal across most themes, although in *politics, development* and *social* thematic frames, the number of EU-related articles is greater than that of articles relating to Europe. In Japan, the number of articles concerning the themes of *economy* and *politics* is slightly higher for the EU than for Europe. In the Russian press, the number of articles on the theme of *politics* that relate to the EU is higher than that for Europe.

In the *traditional media analysis*, March 2021 accounted for the largest monthly share of the total volume of articles, both concerning the EU (36.3% of all EU-related articles published during the three-month observation period) and Europe (36.4% of all Europe-related articles). February saw the lowest monthly share of articles in both the EU (30.9% of all EU-related articles) and Europe (28.9%) datasets in the traditional media sample. During the observation period, which ran from 1 February to 30 April 2021, **a gradual increase was observed in the number of references in both the EU and Europe datasets on social media**. For Europe, the peak revolved around the discussion concerning a European Super League in almost all locations apart from China and Japan. In relation to the EU, social media peaks were linked to COVID-19 and vaccination – namely, the prices of vaccines in India and the EU, health in general in Japan, the EU’s legal action against AstraZeneca, as well as the EU’s plan to allow entry for vaccinated American tourists in the EU. Importantly, peaks in social media come when posts feature ‘local hooks’ linking either to the EU’s activity in the observed partner country or to the EU’s activity in relation to the direct interests of the partner country. In addition to COVID-19, examples include a peak in Colombia regarding the agreement between the Republic of Colombia and the European Investment Bank (EIB) on the establishment of a regional representation of the EIB in the country. In India, the peak regarded the EU’s participation in the Raisina Dialogue in India; in Indonesia – the Indonesia’s Multi-Stakeholder and Policy Dialogue Series where an EU representative participated; in Nigeria – the EU promoting a united Nigeria in the context of the activities of the Indigenous People of Biafra organisation; and in Russia – the phone call between President of the European Council Charles Michel and Vladimir Putin. Other factors that drove the peaks were linked to problems/complications in the EU itself (e.g. Brexit was referenced in Nigeria) or its external activities (e.g. EU sanctions against China were mentioned in all locations, China’s mirrored sanctions against the EU were mentioned on Russian social media).

In both the EU and Europe datasets of the *traditional media analysis*, the most **visible countries** were Germany, France, Italy and Spain, with several thousand mentions each. The Netherlands, Denmark, Belgium and Sweden are mentioned in more than 1,000 articles each across both datasets, while Portugal, Poland, Austria, Ireland, Greece and Hungary are mentioned in more than 500 articles each. The most prominent business-related sources and influential dailies report 33% more often about Europe than they do focusing solely on the EU (Figure 11).

FIGURE 131. VISIBILITY OF EU MEMBER STATES IN TRADITIONAL MEDIA (2021)



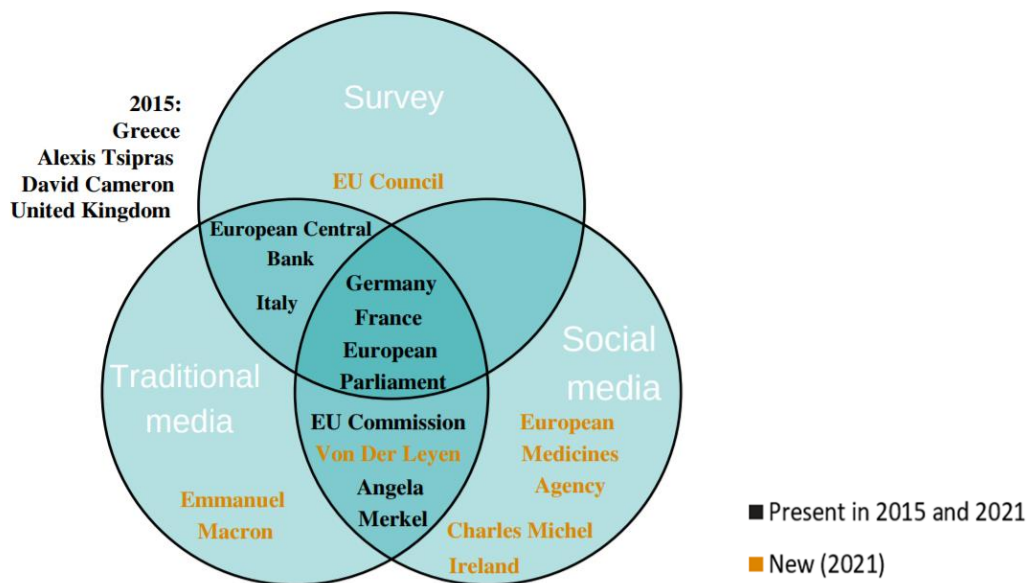
Source: Based on quantitative media analysis. Data were gathered between 1 February and 30 April 2021.

The *social media analysis* reveals a slightly more nuanced picture. In the EU dataset, the most visible Member States are Germany, France, Ireland, Italy, Spain and Hungary. Germany, France, Italy and Spain are mentioned within the frame of economics, Ireland is mentioned with reference to its extraordinary economic performance and special COVID-19 measures, and Hungary is often mentioned in relation to its conflicts with the EU. The visibility of countries in the Europe dataset is very similar.

In the *traditional media analysis*, the **most visible EU leaders** were European Commission president, Ursula von der Leyen, followed by the EU High Representative, Josep Borrell, and the President of the European Council, Charles Michel, as well as the President of the European Central Bank, Christine Lagarde. This marks a change from the 2015 Baseline Study, when the most visible leaders were the European Commission's Jan Claude Juncker, followed by the President of the European Parliament, Donald Tusk; President of the Eurogroup, Jeroen Dijsselbloem, and only then the then-HR, Frederica Mogherini. The increase in the visibility of the post of HR is of special note in the Update Study. Josep Borrell is the second most frequently mentioned EU official in news focusing on the EU. He received a share of negative visibility (in Russia, Brazil, India, Mexico) following his visit to Moscow in 2021, and was reported in the context of the EU's vaccine exports regime (Mexico, South Korea).

In 2021 as in 2015 crises boost the visibility of individual EU Member States and their leaders and crises boost the visibility of individual EU Member States and their leaders (Figure12).

FIGURE 12. MOST RECOGNIZABLE EU COUNTRIES, INSTITUTIONS AND LEADERS ACROSS THIRTEEN COUNTRIES IN 2021



Source: Prepared by the Core Team based on quantitative media analysis.

The *traditional media analysis* also shows that the **leaders of Member States** are mentioned twice as frequently in the EU dataset compared with the Europe dataset. The most frequently mentioned **leaders** in both datasets are Angela Merkel, Emmanuel Macron and Mario Draghi. Viktor Orbán, Sebastian Kurz, Pedro Sánchez, Andrej Babiš, Mark Rutte, Mette Frederiksen are mentioned between four and 10 times less often than the most visible leaders. Similarly, on *social media*, the most frequently mentioned leaders of Member States in the EU dataset are Angela Merkel, Emmanuel Macron, Mario Draghi, Viktor Orbán and Micheál Martin. These findings are in line with the most visible EU Member States in the 'EU' dataset, with the exception of Pedro Sánchez of Spain. In the 'Europe' dataset, Angela Merkel, Emmanuel Macron, Viktor Orbán and Mario Draghi are the most mentioned leaders, followed by Mette Frederiksen and Pedro Sánchez. However, as noted in Annex III (Comparative traditional media report), the *context* in which the most visible EU member states and EU leaders are mentioned has changed. In 2021, many EU Member States and their leaders feature in the news due to their handling of the COVID-19 crisis. For instance, coverage now includes Hungary's violations of EU democratic standards, or its decision to immunise its population using COVID-19 vaccines not yet approved by the EMA, which explains the high visibility of Hungary.

4.2.2. Actorness in thematic frames

Aggregated analysis of the *public opinion polls* indicates that the general public more often connects the thematic frames of the *economy*, *RST*, *politics* and *social development* with the EU than with Europe. The thematic frame of culture, meanwhile, is more often associated with Europe, apart from in India, Indonesia and Nigeria, where all areas are associated with the EU (Table 14).

The theme of *RST* is associated with the EU in most countries in the sample, except for Japan, South Africa and the US, where it is more often associated with Europe. In all countries except the US and Japan, the theme of *social development* is associated with Europe rather than with the EU. Russia presents a specific case in which the general public associates the themes of *culture* and *sports* and *RST* primarily with Europe, followed by individual EU Member States, and only then with the EU.

TABLE 14. ASSOCIATION OF THEMES WITH THE TERMS 'EUROPE' AND 'EU', BY COUNTRY (2021)

	Economy	RST	Politics	Social development	Culture
Brazil	EU	EU	EU	EU	Europe
Canada	EU	EU*	EU	EU*	Europe
China	EU	EU*	EU	EU	Europe
Colombia	EU	EU	EU	EU	Europe
Indonesia	EU	Europe*	EU	EU	EU
India	EU	EU	EU	EU	EU
Japan	EU*	Europe	EU	Europe*	Europe
South Korea	EU	EU	EU	EU	Europe
Mexico	EU	EU	EU	EU	Europe
Nigeria	EU	EU	EU	EU	EU*
Russia	EU	Europe	EU	EU*	Europe
US	EU	EU*	EU	Europe*	Europe
South Africa	EU	Europe*	EU	EU	Europe

Source: based on Q22: 'Some people think about the EU when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the EU – comes to your mind first when you think about the following subjects?' ('EU', 'Europe', 'Specific European countries', 'No difference between them', 'Do not know / cannot answer'). The data results can be found in Annex II.

* Denotes lower level of differentiation.

The more frequent association of the theme of *culture* with 'Europe' is substantiated by the findings on the thematic frames in the *traditional media analysis*. The thematic frames with which the EU was most visibly associated in 2021 Update Study are *politics* (23%), the *economy* (22%) and *health* (20%). For **Europe**, the most widely associated themes are the *economy* (22%), *culture* (20%), *health* (19%) and *politics* (15%). The majority of articles in the 'Europe' dataset (75%) feature at least one of the four dominant themes above. These findings echo the 2015 Study, in which the EU framed predominantly as an economic and political actor (the leading frames in all 10 countries), while and Europe was associated with social and cultural topics. **A major difference between the two studies is the prominence in both the Europe and EU datasets of the 2021 Update Study of the frame of health, which was not present in the Baseline Study.** Due to this, the theme of *culture* has become less visible in the EU dataset, while *politics* is less visible with regard to Europe.

Traditional media analysis of the Update Study shows limited coverage of the EU/Europe in the context of climate and environment in all 13 countries. However, climate change and EU action within this thematic frame has now become a cross-cutting theme, marking a difference with the 2015 Baseline Study. The thematic frame of climate is often reported in conjunction with other thematic frames and sub-themes such as energy, sustainable development and renewables. Several countries report specific EU actions in this issue area with a strong 'local hook' – in India, the regional edition of the *Times of India* (Chandigarh edition) reported the celebration of Earth's Day (with EU delegates) in Roorkee. In Colombia, the press reports EU actions aimed at preserving biodiversity

in Colombia, as well as sustainable agriculture. EU actions on climate change/biodiversity/environmental challenges receive major attention and positive assessments in Nigeria. The media in Nigeria focus on EU green economic growth, agri-business and green recovery. Energy and RST are rarely mentioned in the traditional media outlets included in our sample. This low profile represents a note of continuity between the findings of the 2015 Baseline Study and the 2021 Update Study.

Traditional media continue to associate the themes of *culture* and *sports* with Europe, rather than the EU. The only countries in which the media report on the EU in relation to the issue area of culture are Japan, South Korea, China and Russia. In relation to Europe, *arts*, *sports* and *music* receive relatively high coverage compared with other themes (around 20% on average). An exception is the Japanese media, in which these topics are covered very intensively (30% of all thematic coverage).

The findings from the *traditional media analysis* are in line with the findings from the *social media analysis*. In the EU dataset, *politics*, *health* and the *economy* are the most prominent themes. *Health*, *culture* and the *economy* are the themes that occupy the largest share of the Europe dataset. The theme of *health* has become relevant due to the COVID-19 pandemic, and vaccination-related content appears in both datasets. The role of both the EU and Europe in global vaccine production is often mentioned alongside the responsibility to support developing countries and distribute medical tools. The relevance of the EU is considered a *global* factor here, as no particular *location-specific* events are connected with the theme of *health*. In 2015, *health* was not prominent among the thematic fields. *Politics* and *economy* received a somewhat higher share of coverage in the EU dataset. As such, social media frames the EU as an economic and political actor – the same pattern observed in the 2015 study. The main topics within these thematic fields are location-specific but they capture global attention. Discussion revolves around the tension between the EU and the UK as a result of Brexit. Another issue of rising importance is the Tigray conflict, as well as the conflict in Ukraine and the EU's responsibility towards it. Sanctions against Russia or China are also among the frequently mentioned issues. The theme of *culture* is mostly discussed within the Europe social media dataset, especially in Nigeria, Brazil, Russia, Japan and South Korea. But while the main discussion in Nigeria and Brazil is around sport and football, on Russian, Japanese and South Korean social media, culture is mentioned in relation to classical art or cuisine, for example.

4.2.3. Emotional charge

Quantitative analysis of the *traditional media* findings on emotional charge was limited. Only Canada, India, Nigeria, South Africa and the US were analysed, because it was only possible to evaluate language sentiment in the English language. In both the EU and Europe datasets, mostly neutral (40-46%) to positive (38-40%) sentiment is found. Although the share of negative and slightly negative news is identical between datasets (1% and 10% respectively), the Europe dataset contains higher percentage of positive articles than the EU dataset (11% and 4% respectively).

A similar trend can be observed in terms of the sentiment applied to different thematic frames. In the EU dataset, the theme most frequently regarded in a positive manner was *energy* (52% positive and slightly positive news). On the opposite side was *politics*, with 42% positive or slightly positive news. In the Europe dataset, *energy* had the lowest percentage of positive stories (44%), while *development* and *social* received 50% and 51% positive coverage, respectively. General observations suggest that fluctuations in language sentiment are evenly spread between themes.

Based on the **automated sentiment analysis of social media datasets** by *Mediatoolkit*, the EU is assessed positively in 30-40% of aggregated social media samples from Twitter, Facebook and Instagram in most countries, with Brazilian social media framing the EU somewhat less positively (positive evaluations constituted only around 24% of the total sample). Japanese and Chinese social media evaluates the EU either neutrally or with mixed sentiments, which may be explained by the specificity of the languages and the functioning of the

Mediatoolkit tool itself.⁴⁷ Social media users in Brazil, South Africa, Canada, Mexico and the US evaluate the EU more negatively than positively. Europe is considered more positively, between 38% and 60% positive sentiment in all the countries except for Japan and China, which have a high share of neutral and mixed sentiments towards Europe. Overall, Europe is considered regarded more positively than negatively across all 13 countries.

⁴⁷ Paulhus, D.L. (1991). 'Measurement and control of response bias'. In: Robinson, J.P., Shaver, P.R. & Wrightsman, L.S. (eds.), *Measures of Personality and Social Psychological Attitudes*, San Diego: Academic Press, pp.17-59.

Target groups, audiences and potential partners

5.1. Introduction

This section highlights the key audiences for the EU's public diplomacy, as identified during the course of literature review, traditional and social media analyses, as well as via focus groups with youth and interviews with decision makers in the 13 partner countries. The section also references the audiences addressed by EU public diplomacy initiatives and identified by EU policy practitioners in the respective locations.

5.2. Target groups and audiences

We categorise target audiences by identifying their strategic importance to the EU's foreign policy, e.g. the immediacy of impact they have on EU public diplomacy efforts in the partner countries, as well as the impact on domestic audiences in these locations. In descending order, these are: policy and decision makers immediate strategic publics; and mass publics.⁴⁸ This order also represents how quickly and directly they may be approached in the course of public diplomacy actions, ranging from more short-term, state-based arrangements with policy makers, to poly-lateral diplomacy that engages both state and non-state actors and, finally, a long-term, unmediated approach towards broader audiences.⁴⁹

The analysis of public diplomacy initiatives reveals highly diverse approaches towards key audiences, depending on the theme of an outreach event and the accessibility of the public. Policy and decision makers feature more prominently in events associated with the areas of 'hard power' politics, such as security, politics and the economy. Here, policy makers and business people are often the key participants. However, in a change from the findings of the 2015 Baseline Study, we register references to regional and international actors as important strategic players in the literature and media, and by the interview participants (in particular, ASEAN and China in the context of in Asia; a number of regional organisations in India; and the US, in a number of the other locations in focus). It is also worth noting that the cohorts across different methods of data gathering have a 'systemic' awareness – i.e. regarding where their country sits within the global system, and which other actors might be relevant to that system (although the EU is not always perceived as being as relevant as, for example, the US or China).

Also differing from the 2015 Study, our analysis of public diplomacy initiatives reveals a number of 'blended' events and practices that introduce the EU to broader audiences. These include the general public but even more so, strategic publics – local and regional governments (a new trend in 2021), media, youth, think tanks and academia. The themes of such events are also 'blended', and address issues important to local audiences (the economy, security, climate and the environment, RST, development), encouraging a higher rate of participation. Importantly, these 'blended' events mix 'hard and 'soft' power issue areas, increasing their appeal among the key audiences.

Finally, interviews with EU practitioners reveal a further need for strategy development around the selection of target audiences, depending on resource availability and the accessibility of these audiences. The COVID-19 pandemic has hindered people-to-people contacts, thus limiting the EU's access to key audiences and prompting a shift towards online and 'hybrid' events (mixing online and face-to-face tools). The need to conduct public

⁴⁸ Pacher, A. (2018). Strategic publics in public diplomacy: A typology and a heuristic device for multiple publics. *The Hague Journal of Diplomacy*, 13(3), 272-296.

⁴⁹ Wiseman, G. (2019). Public Diplomacy and Hostile Nations. *The Hague Journal of Diplomacy*, 14(1-2), 134-153.

diplomacy within the new media ecology has also drawn attention towards (mostly) social media influencers as a new and emerging type of strategic stakeholders that can engage with broader audiences, but also as an audience in itself. Also, audiences in different countries vary significantly in terms of their awareness of the EU (aware vs. non-aware), as well as in their attitudes towards the EU (positive, friendly and supportive vs. sceptical, critical or hostile vs. neutral or indifferent), which should be taken into account in the design and execution of EU public diplomacy activities. Lastly, EU public diplomacy not only engages increasingly using 'blended' events in terms of themes and tools, but also with 'mixed' audiences (across key groups, different demographics, engaging with minorities). This rising complexity increases the need for EU Delegations to practice and hone their role as coordinator, facilitator and boundary-spanner, following the principle: 'Let others speak, and let us listen'.

Below, we present our generalised findings in relation to the identified categories of the target audiences, in line with the trends listed above. All findings are based solely on the empirical evidence from the various methods deployed in this study.

Policy and decision makers

Public diplomacy and foreign policy practitioners from the partner countries

These audiences are not visible in this study. They are mentioned in passing – in the context of state-to-state contacts, as part of a normal diplomatic exchange, but only in interviews with local and EU practitioners and only to a very limited extent. In interviews, practitioners from EU Delegations highlighted several countries in which EU Delegations actively engage with young local diplomats in the form of exchange visits by the young diplomats to Brussels, and regular meetings between the Head of the EU Delegation with young diplomats at a local MFA for skills-oriented seminars. However, such initiatives were curbed due to the COVID-19 pandemic.

Governments, heads of state

Government agencies and representatives remain a key group of stakeholders for EU diplomacy, and their role is even more crucial to the success of EU public diplomacy in locations where bilateral relations are hindered by, for example, historical experiences or adverse administrations. It is vital to note here that attitudes towards the EU among this group of stakeholders vary significantly – not only between countries, but sometimes within countries (e.g. due to internal polarisation at a given time or a change in political leadership over time) and within a country's institutions, or even between levels of seniority. Despite the diversity of attitudes and perceptions among local stakeholders in the government sector, they agree that maintaining working relationships with governments is crucial to the functioning of EU Delegations as a whole, as well as for EU outreach and the promotion of EU policy objectives. Intensifying high-level contacts, summits and visits is seen as an important aspect of public diplomacy. Some existing practices mentioned in interviews include closed-door roundtables, frequent one-on-one meetings, as well as the involvement of governments in public diplomacy campaigns aimed at key domestic audiences. Decision makers in the partner countries also mention the importance of EU diplomatic engagement not only with ruling parties but with the opposition and shadow cabinets.

National agencies and government organisations

National agencies – especially, in the context of the pandemic, health agencies – feature increasingly in this study. Such agencies can be a strategic audience – in particular, where a theme-based approach might help due to political relations with a country being otherwise tainted. Outreach to this stakeholder group can create access on a working level and introduce practices and formats for knowledge-sharing that specifically target key themes of concern to national agencies, utility providers or other governmental organisations.

Local/regional authorities and governments

Cooperation with local/regional authorities is a crucial new feature identified in the 2021 Study. Local councils and governments appear to be receptive to and supportive of EU public diplomacy initiatives, sometimes even more so than national governmental structures and officials based in capital cities. In general, capital cities were described by the EU Delegation practitioners and local experts interviewed as oversaturated with events and outreach from multiple international actors. Outreach to key local/regional audiences the EU's visibility to increase in regions of heightened importance within countries that have large territories and diverse populations. Outreach outside the capitals of target countries is recognised among EU diplomatic practitioners on the ground as a tool for creating a wider and stronger base for long-term partnerships with fewer limitations.

Immediate strategic publics

Business

Interviews with EU public diplomacy practitioners from 13 EU Delegations confirmed that business audiences remain highly relevant to EU public diplomacy in the context of trade, investment and the economic benefits that economic cooperation between the EU and strategic partner may bring. The analysis of external perceptions demonstrates that expectations of such benefits and the conclusion of trade agreements tend to drive positive images of the EU in general, and particularly among those businesses and entrepreneurs who already cooperate with the EU. However, the negotiations of trade agreement, and especially around sensitive issues, may stir mixed perceptions. In several locations, the interviewed business leaders revealed mixed attitudes towards the EU in the light of its perceived protectionism, particularly with regard to agriculture (in Canada, South Africa, see also Annex I Literature Review overview these perceptions in the last five years) and geographical indicators (e.g. Japan). Interviewed local experts suggest that EU public diplomacy should acknowledge and factor such reservations and address them in an open-ended, unhindered dialogue with local economic institutions such as chambers of commerce, business and industry associations and unions, trade organisations and specialised producer unions. External observers communicate that such dialogues should feature the EU's self-critical perspectives, as well as detailed explanations of opportunities and risks for both sides. Perceptions of the EU as an economic and trading power have been the core elements of its image over the decades; thus it is crucial to invest into the maintenance of this perception in the long term.

The Update Study identifies that sectoral dialogues, and the thematic blending that is becoming more and more popular in EU public diplomacy initiatives, are seen by external stakeholders as effective tools to secure wider outreach to local business communities. They are perceived as even more effective when economic matters are seen to impact other areas such as climate and the environment, development assistance and the green recovery. In the countries where EU relationships with the local governments are seen as challenged, interviewed stakeholders communicate that constructive trustworthy business relationships with the EU can further the EU's connections with wider domestic audiences. Such initiatives are also seen to provide an effective means of coordinating with local stakeholders across other cohorts. They are critical to the creation of long-term social capital that can improve the resilience of the EU's image during crises, as well as providing groundwork on which to negotiate trade agreements and decisions, as well as access to opening and emerging markets. For external observers in the partner countries, business cooperation also represents a crucial aspect of capacity-building that improves the image of the EU: e.g. EU-supported projects may create job opportunities for local communities.

Media

In addition to the Literature Review (Annex I) and media analyses (Annexes II and III), interviews with newsmakers reveal their high level of awareness of the EU. However, media analysis and the interviews demonstrate that local media professionals vary in terms of the *degree of interest* they show towards the EU. While

the Update Study finds coverage of the EU to be predominantly neutral across the target countries, negative framing dominates reportage on the EU in the context of crises – a normal situation for an industry in which conflict drives the ‘selling’ of news. Much of the news about the EU observed in the 2021 Update Study is EU-specific, with limited local grounding in relation to EU actions and actors. This framing projects a particular impression to local audiences – that of a certain distance between the EU and the location in question. Importantly, most of this EU-focused news originates from international sources, and is incorporated into the local media agenda as a result of newsgathering and gatekeeping practices in the respective countries. However, the project also observed EU news stories that were driven by a ‘local hook’. Typically, this type of news is authored by local newsmakers. The inclusion of such ‘local hooks’ increases the visibility and perceived relevance of the EU to local audiences. While the former type of news tends to frame the EU in more negative terms, the latter type is characterised by somewhat more positive profiles (of course, not universally). This finding suggests that EU public diplomacy should continue to engage with local news writers who report on the EU in general and on EU public diplomacy actions, in particular with a ‘local hook’.

Overall, the Update Study demonstrates that media representatives in different countries handle the reporting of the EU differently, depending on locations, outlets and issues. In some countries, EU public diplomacy encounters curtailed media freedom (through state control, censorship and sometimes threats to the safety or lives of journalists). Other locations have liberal democratic media environments. Public diplomacy outreach to key media audiences varies accordingly. Outreach to local news writers and gatekeepers is dependent on the respective media environments of the countries concerned, and the political consequences of such outreach for local media professionals. While in some locations, direct dialogue and advocacy with the most prolific news writers and key gatekeepers represents an effective mode of cooperation, in other countries, outreach may be carried out in terms of support provided to local media organisations through training, exchanges and education. For example, the EU-supported trainings of journalists and facilitating networks of media professionals are seen as crucial to increasing the EU’s local visibility. Interviewed local media stress that such programmes can increase awareness, knowledge and interest in the EU among media professionals, as well as motivate them to write news about the EU that may be of wider interest to the general public. Another direction for outreach outlined by both interviewed EU public diplomacy practitioners and local experts is the broadening of the networks of cooperation by engaging with regional and non-mainstream media.

The Update Study media analysis showcases that while news media tend to focus on current events, the overall framing of the EU will always be informed by a country’s historical experiences with Europe/the EU. Interviewed local experts reiterate that it is important, therefore, to factor in historical legacy and sensitivities when dealing with opinion-formers and agenda-setters as a part of EU public diplomacy initiatives. Furthermore, given the general media focus on crises, it is important that the EU communicates a message of the EU’s resilience – an actor that is equipped to respond and adapt to crises when they emerge.

Civil society

Civil society remains a key audience group for EU public diplomacy in order to establish a basis for its long-term cooperation with local publics. Across all key partner countries, civil society experts interviewed during the Update Study share that the civil society remains receptive to EU norms and messages. On the one hand, the diverse profiles of these organisations allow the EU to engage in dialogue and cooperation in a range of key areas in each location. On the other hand, location-specific conditions prescribe the need to map and address this diversity more precisely identifying the most meaningful for the location themes (e.g. environmental concerns in Brazil, cultural matters in Russia, gender-based violence in Nigeria, etc.). In the eyes of the interviewed local experts, civil society is a key contributor to the genuine dialogue between the EU and the wider publics in respective locations. However, civil society leaders in locations also express concerns where the EU appears to act against its values internally (for example the democratic backsliding of some Member States)

Cross-country, regional and global networks of civil society organisations highlight the importance in creating and sustaining a thriving multilateral world order, of which the EU is a champion. Civil society actors recognize that they are important in assessing and mapping local political actors in a country, and in identifying what expertise and resources would benefit the wider public. One of the main messages from external observer is the importance of knowledge-sharing formats – not only in order to support civil society, but also to create lasting and trusting relationships. Interviewed EU public diplomacy practitioners stress that civil society groups differ within a given society. Some may be well connected to/aware of the EU. Others may require more information and links. As such, EU public diplomacy initiatives towards this key audience must be differentiated. Irrespective of their degree of awareness, knowledge of and engagement with the EU, grassroots civil society organisations will remain a key audience for the EU able to assist with broader outreach and in communicating a positive image of the EU if they are engaged in co-creative relationship through mutually-beneficial shared-leadership projects.

Academia/think tanks

The Update Study 2021 confirms that one of the key audiences for the EU's public diplomacy outreach – academia and think tanks – remain highly aware of the EU. Both EU public diplomacy practitioners and external experts are aware that this group includes numerous beneficiaries of exchange programmes and joint scientific projects run by the EU and its Member States, as well as intellectuals who interact/collaborate with European colleagues as a part of their extended professional networks. Special recognition gets a narrower circle of academics who receive EU support (e.g. from Erasmus+, Jean Monnet, Horizon 2020, Think Tank Twinning Initiative, etc.). The members of this key group acknowledge that this support allows them to advance from short- to medium- and long-term research collaborations that focus on the EU, and to initiate regular and ongoing dialogues with EU colleagues, stakeholders and students on various topics including norms and values.

EU public diplomacy practitioners underline that like civil society, academia and think tanks are important strategic audiences for the EU's public diplomacy efforts – not least due to their national and international networks and ability to form opinions among and communicate about the EU with youth as well as local, regional and international policy makers. The interviews with local experts reveal that this cohort recognises the immediate benefits of collaborating with the EU, specifically in terms of efforts and initiatives that support research, teaching, service to academic disciplines, intellectual debates, exchanges, fellowships and publications – both for senior experts/lecturers as well as for students at all levels. The Update Study confirms that in their eyes, public diplomacy formats designed around open dialogue and collaboration, with shared leadership, are the most effective. They also appreciate opportunities to provide informed feedback to EU Delegations, as well as to consult with European diplomats regarding location-specific nuances and (historical) contexts.

Youth

Both interviewed EU public diplomacy practitioners and local experts agree that young people are a key audience for EU public diplomacy initiatives due to their status – the future policy, decision and opinion makers of their country and future voters. They will shape the relationships between their country and the EU in the future. While the literature review provided limited and contradictory reports as to perceptions of the EU among young people (see Annex I), the focus groups carried out with students as part of the 2021 Update Study reveal common patterns across the 13 countries. First, the degree of awareness regarding the EU varies widely among the students. It is higher among those studying political science, international relations and EU studies, or among those involved in programmes supported by the EU. Awareness of the EU is somewhat limited among respondents from other majors, including those issue areas in which the EU prides itself on international leadership which it outlines as its policy priorities (e.g. the environment, human rights).

Perceptions of the EU among young people are also highly individual. The Update Study 2021 finds that personal exposure to the EU does not necessarily translate into positive perceptions of the EU/Europe. Young people seem to support the idea of the EU as a normative power and share high expectations of the EU in its normative role

across different themes. The Update Study reveals that if these expectations are not met, perceptions of the EU can grow extremely negative. Young people also appear to be concerned with the benefits that cooperation with the EU might bring to their country, and how relevant such cooperation (or the EU) is to their daily lives. Our analysis finds that young people appreciate the EU for the lifestyle it warrants for its citizens, but feel somewhat distanced from it. The surveyed young people communicate that for EU public diplomacy to be more attractive to youth, the EU needs to bring the EU closer to the needs and themes that matter to young people and make it more relevant to their locations' needs. The 2021 Update Study findings point to these themes: climate and environmental, social and climate justice, gender equality, LGBTQ+ justice and human rights.

Interviewed young people – students of prestigious local universities -- demonstrate a striking global awareness of and concern about injustice around the world, and often express solidarity. In their opinions, EU public diplomacy may be a tool to facilitate discussion and collaboration frameworks through which youth can address these issues. Youth is also found to be an audience that attentively compares what the EU says with what it does. While this links to the expectation element mentioned above, it also means that public diplomacy efforts aimed at this group require a better internal alignment of narrative with action, including an acknowledgement of historical responsibility. Mapping the perceptions of young people across 13 countries reveal that youth also represents a 'voice for change', and is thus a cohort crucial to understanding the present reflexively, through visions of the future that are matched against evaluations of an actor's behaviour. EU public diplomacy needs to account for this reflexive process, while providing space for youth to share such visions – within their own countries and more globally. Beyond reaching out to the existing youth and cultural institutes of Member States, this also requires the EU to find innovative and consistent avenues for engagement.

Other representatives (celebrities, influencers, religious leaders, cultural personalities)

Interviewed EU public diplomacy practitioners stress that social media influencers have grown into an important strategic audience for EU public diplomacy, due to the increased role of social media and the impact such people have on the opinions of their followers. However, engaging such actors requires them to be interested in the EU in the first place. Shared values, interests and benefits appear to be possible drivers for such cooperation. Since this is a new sphere for strategic collaboration, it is vitally important to understand which audiences such cooperation allows the EU to reach out to, in what sector, and what messages to promote. In their interview, the EU public diplomacy practitioners underline that this key group is highly country-specific. Engagement with them requires an understanding of in-country social media, cultural and popular media landscapes, as well as the individual preferences of specific personalities, before such engagement can take place. In the eyes of the practitioners, EU public diplomacy will continue with a heavy focus on social media communications, closely intertwined with the EU Delegations' digital diplomacy strategy. The pandemic has spearheaded and increased the use of digital diplomacy tools, including EU communications via various social media channels. The interviewed public diplomacy experts understand that the e-diplomacy tools developed during the pandemic are here to stay, and will continue to play an important role in connecting EU public diplomacy with influencers in the virtual space.

Cultural leaders are among the key audiences for EU public diplomacy – not least due to perceptions of the EU/ European cultural interactions and cultural diplomacy as a 'safe' tool for soft power, especially in locations that may exhibit political or normative differences with the EU. The interviewed cultural leaders in partner countries are aware that culture has the capacity not only to provide a uniting moment for people across borders, but also to generate profit for the EU and local actors, and to serve as an effective vehicle to communicating normative messages. The interviewed local experts stress that while cultural diplomacy continues to be associated more with the public diplomacy of EU Member States, the communal approach – when the EU Delegation and EU Member States' embassies join and synergise their actions – allows to link cultural issues and relations to the EU more broadly and increase its visibility as an entity in the cultural field. In the eyes of EU public diplomacy

practitioners, this key group will remain of heightened importance to EU public diplomacy due to their ability to influence not only opinions but emotions, and to appeal to the general public through creativity.

Mass (general) publics

The public is the ultimate recipient of EU public diplomacy. Public attitudes are a crucial indicator of the attractiveness and/or visibility of the EU across all locations. While the literature review and interviews point to an overall lack of awareness of the EU among the general public, the public opinion survey conducted for the 2021 Update Study points to a growing level of awareness of the EU. In comparison to the 2015 Baseline Study, a greater number of survey respondents read or hear about the EU, and more participants hold opinions regarding the EU. Irrespective of this growing awareness, other cohorts including experts and focus group participants consider there to be little awareness of the EU among the general public, and argue for mechanisms to increase the EU's visibility, specifically by increasing interest in the EU among the general public. While the dissemination of information about the EU might increase its visibility, the track of public diplomacy initiatives reveals that projects that are seen as being of direct relevance/benefit to the locations in question tend to gather bigger publics and result in more positive evaluations of EU actions and their results. These 'local hooks' are crucial for engaging domestic audiences. As such, the EU's higher visibility tends to be driven by framing in which EU actions are seen as being linked to local priorities/themes/problems. The EU is perceived positively when it is seen to support the location in addressing these problems and priorities. The 2021 Update Study also reveals a number of factors that are crucial to the success of public diplomacy initiatives targeting the broader public. These include the perception that the EU provides a creative approach to problem solving; local recognition of the EU's ongoing support and its sincere desire to understand the location in question, as well as its more visible positive profiles in media.

Potential partner organisations

Annex VII lists **682 potential partner organisations** for future outreach activities across countries. The Update Study identifies them by compiling the main findings from interviews with national experts and decision makers, student focus groups, traditional and social media analyses from the 13 strategic partner countries.

Six categories of actors, organisations or institutions were mapped, taking into account their differing levels of influence: government, business, civil society, academia and think tanks, the media, and the general public elaborated above. The key players are linked to the **thematic frames** analysed in this research, and the majority of potential partners are found within the most prevalent thematic frames – *economy, politics and health*. Both government and non-government organisations, as well as business, academia and think tanks were the most prominent categories of potential partners in the 2021 Update Study. Although the study's recommendations are distributed across various sectors, several sectors and industries were more visible, namely finance, agriculture and energy. The health care industry was also a focus in certain countries (South Africa and Colombia).

Although the EU can address **national and local governments** through traditional diplomatic means, it is still important to address relevant policy makers in more localised context. This is of particular relevance in countries with more decentralised forms of governance, in which local institutions have greater power and are of potential interest to the EU. **Non-governmental organisations** are more prominent in the Update Study, and reveal potential for more intensive collaboration. Civil society actors can be very efficient in spreading message concerning the EU, although their highly diverse areas of interest remain a challenge, necessitating instrumental and targeted selection. **Business** in general is the group most aware of the EU and its policies, due to close economic relationships, and various sectors therefore provide opportunities for EU public diplomacy initiatives. The success rate in reaching target groups in this category (such as chambers of commerce or industry associations) is among highest in the proposed partner list. Lastly, **think tanks and academia** may provide

additional visibility to existing initiatives and could help to communicate EU messages. This group may also be able to provide expertise in various fields, necessary to facilitate timely, evidence based and successful initiatives. International media remain the crucial narrator about the EU across multiple locations and, thus, the key source of information about the EU and its policies. Media professionals from third countries may share information provided by EU institutions with the public, but their work is guided by the principles of newsmaking – information should attract audiences and be served fast – as well peculiarities of the media and political environments in each location. The general public remains the least informed about the EU key group. While the awareness level presents a challenge to the EU public diplomacy, positive attitudes traced in all public opinion surveys towards the EU across most policy-areas present a solid potential for the EU.

Key indicators

6.1. Adjustments to the methodological approach

In 2015, indicators were grouped into a series of 10 databases, gathering together the findings of the public opinion poll and the traditional media analysis. In 2021, there are 13 databases (one for each target country). The focus of the databases is mostly on quantitative indicators, which allow the monitoring and analysis of EU perceptions globally over time. Our approach builds on the methodological approach of the 2015 Baseline Study by mapping the key research criteria of visibility, effectiveness and local resonance, as well as the thematic fields studied by the different methods used in the study. The 2021 Update Study introduced substantial innovations into the *social media analysis* component of the study; thus, all of the databases were amended to include the results of the 2021 social media analysis. The list of indicators added to the study is presented Table 15 below.

TABLE 15. SOCIAL MEDIA ANALYSIS INDICATORS ADDED TO THE DATABASES

INDICATOR	DESCRIPTION
EU visibility in social media (1.1.c)	The extent to which the EU is mentioned in the target country, per month
Europe visibility in social media (1.1.e)	The extent to which Europe is mentioned in the target country, per month
Visibility of Members States vs. EU institutions in social media (1.1.j.)	The most frequently covered Member States and EU institutions in posts that mention the EU
Visibility of EU vs. Members States officials in social media (1.1.l)	The most frequently covered EU and MS officials in posts that mention the EU
Main topics in social media posts mentioning the EU (1.5.b)	Which topics dominate in social media posts concerning the EU?
Main topics in social media posts mentioning Europe (1.5.d)	Which topics dominate in social media posts concerning Europe?

Source: Prepared by the Core Team.

The Final Report is accompanied by 13 databases, one for each target country, which include all indicators gathered in the study. The databases hold the indicator values for 2015 and 2021.

Further clarifications have been added to the indicators for the public opinion survey. For this reason, we remain cautious about the reliability of certain indicators. These indicators include:

- EU visibility (1.1.a). ‘Rarely’ has replaced the answer option ‘Less often than once a month’.
- Visibility of EU institutions (1.1.h). “European citizenship” was added to the list of EU institutions and symbols.
- Visibility of EU in different sources (1.1.n.) “Entertainment and streaming platforms” and “Movies, art, literature” added to the list of main channels through which public hears about the EU.

The tables below **summarise the change in indicators underlining the findings of this study**. For public opinion poll, as well as some indicators of the media analysis, we indicate how certain indicators have undergone significant change:

- For the results of **public opinion poll**, we denote *some change* (10-15% compared with the baseline indicator) in the public opinion survey results with a single ↑ (indicator's value has increased somewhat) or ↓ (indicator's value has decreased somewhat).
- *Significant change* (15% and above compared with the baseline indicator) is denoted by the symbols ↑↑ (the indicator's value has increased significantly) or ↓↓ (the indicator's value has decreased significantly).
- For the **results of the media analysis**, *some change* (an increase in volume by 20 articles) is indicated by a single ↑ (the indicator's value has increased somewhat) or ↓ (the indicator's value has decreased somewhat). *Significant change* (volume up or down by 20+) is indicated by a double ↑↑ (the indicator's value has increased significantly) or ↓↓ (the indicator's value has decreased significantly).
- For **media and social media analysis**, *some change* between 10 and 15% compared with the baseline indicator is indicated by ↑ (the indicator's value has increased somewhat) or ↓ (the indicator's value has decreased somewhat). *Significant change* (15% or above compared with the baseline indicator) indicated with ↑↑ (the indicator's value has increased significantly) or ↓↓ (the indicator's value has decreased significantly).

6.1.1. Comparison of indicators between 2015 and 2021

6.1.1.1. General perceptions

In the baseline database, the general perceptions of the EU were subdivided into the following sections: visibility, emotional connection, general associations with the EU; local resonance; and a summary of key frames of EU news.

The visibility section (1.1) includes indicators measuring the visibility of the EU and its officials, as well as that of Member States and their officials, in the media, social media and among the public.

TABLE 16. CONTINUITY AND CHANGE IN VISIBILITY

1.1. VISIBILITY	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
1.1.a EU visibility, PO (%)	Visible 98% Not visible 2%	Visible 82% Not visible 18%	Visible 99% Not visible 1%	Visible 93% Not visible 7%	Visible 97.5% Not visible 2.5%	Visible 99% Not visible 1%	Visible 89% ↑↑ Not visible 11% ↓	Visible 100% Not visible 0%	Visible 98.5% Not visible 1.5%	Visible 93% Not visible 7%	Visible 98.3% ↑ Not visible 2.7%	Visible 95% Not visible 5%	Visible 89% Not visible 11%
1.1.b EU visibility in media, MA (#)	Popular 70 Business 38 ↓↓	Popular 85 Business 65 ↑↑	Popular 44 Business 7	Popular 71 Business 56	Popular 32 Business 20	Popular 63 Business 4	Poplar 88 ↑↑ Business 74 ↓	Popular 46 Business 47	Popular 28 ↓↓ Business 74	Popular 87 ↑↑ Business 13 ↓↓	Popular 61 ↑↑ Business 26 ↓	Popular 87 ↑↑ Business 57	Popular 85 Business 98 ↑
1.1.c EU visibility in social media, SMA (# of mentions)	42,202	27,758	5,904	22,162	55,236	15,088	44,779	11,941	30,121	20,617	16,291	3,535	1,426,044
1.1.d Europe visibility in media, MA (%)	Popular 134 ↑↑ Business 31 ↑↑	Popular 63 ↓↓ Business 42	Popular 192 Business 22	Popular 67.5 ↓ Business 72 ↓	Popular 35 Business 24 ↓	Popular 170 Business 17	Popular 152 ↑↑ Business 80 ↓↓	Popular 163 Business 180	Popular 137 ↑↑ Business 100 ↑↑	Popular 153 ↑↑ Business 44 ↓↓	Popular 231 ↑↑ Business 70 ↑↑	Popular 153 ↑↑ Business 91 ↓	Popular 235 ↑↑ Business 223 ↑↑
1.1.e Europe visibility in social media, SMA (#)	165,087	42,148	13,349	36,309	96,926	55,231	642,345	50,756	62,929	19,388	29,552	5,121	1,138,363
1.1.f EU degree of centrality, MA (%)	Minor 22% ↓↓ Major 78% ↑↑	Minor 13% Major 87% ↑↑	Minor 40% Major 60%	Minor 14% Major 86%	Minor 13% Major 87% ↑↑	Minor: 3% Major 97%	Minor 38% Major 62%	Minor 13% Major 87%	Minor 35% Major 65% ↑↑	Minor 16% ↓↓ Major 84% ↑↑	Minor 7% ↓↓ Major 93% ↑↑	Minor 12% ↓↓ Major 88% ↑↑	Minor 18% ↓↓ Major 82% ↑↑
1.1.g Europe degree of centrality, MA (%)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

1.1. VISIBILITY	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
1.1.h Visibility of EU institutions, PO (%)	Euro, European citizenship*, EP	Euro, European Flag, European citizenship*	Euro, the European Parliament, European citizenship	Euro, European flag, the Council of the EU	Euro, European flag, European citizenship	Euro, European flag, European citizenship	Euro, European flag, EP	Euro; European flag; European citizenship	Euro, European flag, ECB	Euro, EP, European citizenship	Euro; European Flag; European Citizenship	Euro, European Citizenship, ECB	Euro, EU Flag, EP
1.1.i Visibility of MS vs. EU institutions in the media, MA (#)	Germany, France, Italy	Germany, France, European Commission	Spain, France, Germany	Germany, France, Italy	France, Germany, European Medicines Agency	Germany, Italy, Spain	Germany, France, Italy	Germany, France, Italy	Germany, Spain, France	European Commission, Germany, European Parliament	France, Germany, European Medicines Agency	Germany, France, Italy	Germany, France, Italy
1.1.j Visibility of MS vs. EU institutions in social media, SMA (#)	European Parliament; European Medicines Agency; Italy	European Commission, Italy, France	European Parliament, European Investment Bank, European Commission	Germany, France, Italy	France, Germany, Ireland	Denmark, Italy, Germany	European Medicines Agency, European Central Bank, European Commission	European Commission, Germany, European Medicines Agency	Spain, European Commission, European Parliament	Germany, Italy, European Commission	Germany, France, Ireland	Germany, France, Spain	Ireland, Germany, European Commission
1.1.k Visibility of EU vs. MS officials in media, MA (#)	Ursula von der Leyen, Angela Merkel, Mario Draghi	Ursula von der Leyen, Emmanuel Macron, Mario Draghi	Ursula von der Leyen, Angela Merkel, Mario Draghi, Josep Borrell	Angela Merkel, Ursula von der Leyen, Emmanuel Macron	Emmanuel Macron, Valdis Dombrovskis, Angela Merkel, Margrethe Vestager	Angela Merkel, Emmanuel Macron, Christine Lagarde	Josep Borrell, Angela Merkel, Emmanuel Macron	Emmanuel Macron, Ursula von der Leyen, Charles Michel	Angela Merkel, Emmanuel Macron, Ursula von der Leyen, Christine Lagarde	Josep Borrell, Ursula von der Leyen, Angela Merkel	Emmanuel Macron, Ursula von der Leyen, Angela Merkel	Emmanuel Macron, Ursula von der Leyen, Angela Merkel	Emmanuel Macron, Angela Merkel, Ursula von der Leyen

1.1. VISIBILITY	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
1.1.l Visibility of EU vs. MS officials in social media (SMA, #)	Ursula von der Leyen, Angela Merkel; Charles Michel	Ursula von der Leyen, Charles Michel, Josep Borrell	Ursula von der Leyen, Pedro Sánchez, Charles Michel	Ursula von der Leyen, Angela Merkel, Charles Michel	Ursula von der Leyen, Charles Michel, Angela Merkel	Ursula von der Leyen, Charles Michel, Angela Merkel	Ursula von der Leyen, Charles Michel, Josep Borrell	Ursula von der Leyen, Charles Michel, Emmanuel Macron	Ursula von der Leyen, Pedro Sánchez, Angela Merkel	Charles Michel, Josep Borrell, Ursula von der Leyen	Ursula von der Leyen, Charles Michel, Angela Merkel	Ursula von der Leyen, Angela Merkel, Charles Michel, Christine Lagarde	Ursula von der Leyen, Charles Michel, Angela Merkel
1.1.m Frequency of hearing about EU, PO (%)	Often 69% Never 5%	Often 42% ↑ Never 18% ↓↓	Often 75% Never 1%	Often 61% Never 7%	Often 72.5% ↑↑ Never 10%	Often 57% Never 3% ↓↓	Often 32% Never 22%	Often 80% Never 0%	Often 63.5% Never 5%	Often 66% Never 10%	Often 60.2% Never 19,5%	Often 51% Never 13%	Often 76% ↑↑ Never 26 ↓
1.1.n Main media channels for hearing about EU, PO (%)	Online media, television channels, social media	Online media, television channels, social media	Online media, television channels, social media	Online media, television channels, social media	Online media, television channels, social media	Online media, television channels, social media	Television channels, online media, print media	Online media, television channels, social media	Online media, television channels, social media	Television channels, online media, social media	Online media, television channels, social media	Television channels, online media, print media	Online media, television channels, social media

Source: Prepared by the Core Team.

Emotional connection section (1.2) features indicators on the feeling and evaluations connected with the EU.

General associations with the EU and Europe (1.3.) features indicators that measure what images and metaphors relating to the EU and Europe were found in the Update Study.

Local resonance (1.4.) features indicators that look at which issues resonate most with the public, as well as the level of domesticity of news regarding the EU – namely, whether news items mentioning the EU primarily focus on the EU level; Member State level or local level in terms of the stakeholders being impacted.

The summary of **key frames of EU and Europe news (1.5.)** is an indicator to show the top three most common frames for EU-related news reporting in each country.

TABLE 17. CHANGE AND CONTINUITY IN EMOTIONAL CONNECTION, GENERAL ASSOCIATIONS, LOCAL RESONANCE AND KEY FRAMES OF EU AND EUROPE

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
1.2. Emotional connection													
1.2.a General evaluation of EU, PO (%)	Positive 76% ↑↑ Negative 4%	Positive 51% ↑ Negative 11%	Positive 79% Negative 4%	Positive 28% ↓↓ Negative 19% ↑	Positive 75% ↑ Negative 4%	Positive 79% Negative 4%	Positive 37% Negative 11%	Positive 86% Negative 3%	Positive 77% Negative 3%	Positive 40% ↑↑ Negative 17% ↓↓	Positive 65% Negative 9%	Positive 48% Negative 9%	Positive 43% Negative 15%
1.2.b General evaluation of EU in media, MA (%)	N/A	Positive 46% ↑↑ Negative 11% ↓	N/A	N/A	Positive 45% ↑↑ Negative 8% ↑↑	N/A	N/A	Positive 6% Negative 1%	N/A	N/A	Positive 48% ↑↑ Negative 12%	N/A	Positive 45% ↑↑ Negative 8% ↑↑
1.2.c General evaluation of Europe in media, MA (%)	N/A	Positive 45% ↑↑ Negative 13%	N/A	N/A	Positive 46% ↑↑ Negative 13%	N/A	N/A	Positive 11% Negative 2%	N/A	N/A	Positive 48% ↑↑ Negative 16%	N/A	Positive 50% ↑↑ Negative 12%
1.2.d Target country relationship w/ EU, PO (%)	Good 59% Bad 12%	Good 56% Bad 7%	Good 58% Bad 6%	Good 34% ↓↓ Bad 12%	Good 80% ↑ Bad 3%	Good 84% Bad 2%	Good 38% Bad 8%	Good 82% Bad 2%	Good 52% Bad 5%	Good 24% ↑↑ Bad 36.5% ↓↓	Good 58% ↑↑ Bad 7%	Good 43% Bad 8%	Good 47% Bad 36% ↑↑
1.3. General associations with EU and Europe													
1.3.b Key associations with EU image, PO (%)	Modern, strong, efficient	Multicultural, modern, united	Modern, efficient, strong	Modern, multicultural, strong	Modern, efficient, strong	Modern, strong, peaceful	Multicultural, modern, united	Modern, strong, peaceful	Modern, strong, efficient	Modern, multicultural, hypocritical	Modern, peaceful, efficient	Peaceful, united, modern	Modern, peaceful, multicultural
1.4. Local resonance													

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
1.4. Local resonance local resonance on important themes, PO (%)	Liberty, respect for human rights, respect for human dignity	Respect for human dignity, Liberty, respect for human rights	Liberty, respect for human dignity, solidarity	Pluralism, respect for human dignity, liberty	Respect for human dignity, solidarity, equality	Respect for human dignity, respect for human rights, Liberty	Liberty, respect for human dignity, democracy	Respect for human dignity, respect for human rights, liberty	Liberty, respect for human dignity, solidarity	Respect for human dignity, liberty, respect for human rights	Respect for human dignity, liberty, respect for human rights	Respect for human dignity, democracy, respect for human rights	Respect for human dignity, respect for human rights, justice
1.4.a Focus of domesticity, MA (%)	MS 22% ↑↑ EU 33% ↑↑ Local 7%↓	MS 39% ↑↑ EU 29% ↓ Local 15%	MS 12% EU 12% Local 45%/	MS 18% EU 33% ↑↑ Local 18% ↓↓	MS 59% ↑↑ EU 3% ↓↓ Local 19% ↓↓	MS 13% EU 43% Local 16%	MS 18% EU 33% ↑ Local 18%	MS 6% EU 14% Local 35%	MS 15% ↓↓ EU 34% ↑↑ Local 18%	MS 6% EU 2% ↓↓ Local 49%↑	MS 5% ↑↑ EU 14% ↓↓ Local 5%	MS 16%↓↓ EU 42% ↑↑ Local 6%↓↓	MS 16% ↓↓ EU 54% ↑↑ Local 7%
1.4.b. MA (EU), Domestic sources vs. International (%)	1% local / 99% international	34% local/77% international	0% local/100% international	16% local/ 84% international	46% local/ 54% international	3% local/97% international	20% local/80% international	24% local/76% international	0% local/100% international	8% local/92% international	0% local/100% international	0% local/100% international	43% local/57% international
1.5. Key frames of EU and Europe news													
1.5.a Summary of key frames of EU news, MA	Politics, health, economy	Economy, politics, social and culture	Health, politics, economy	Economy, politics, health	Politics, economy, health	Economy, politics, health	Culture, politics, economy	Politics, economy, health	Politics, economy, health	Economy, politics, health	Economy, health, politics	Culture, politics, economy	Politics, health, economy
1.5.b Summary of key frames EU SMA	Health, economy, politics	N/A	Health, economy, politics	Politics, economy, health	Health, politics, economy	Politics, health, economy	Health, economy, politics	Politics, health, economy	Health, economy, politics	Health, politics, economy	Economy, politics, health	Politics, economy, health	Politics, economy, health
1.5.c Summary of key frames	Culture, health, economy	Economy, social and culture, politics	Health, social and	Economy, politics, energy	Economy, health, politics	Economy, culture, health	Culture, health, economy	Politics, economy, culture	Economy, health, politics	Culture, economy, health	Economy, culture, health	Culture; economy; health	Economy, culture, health

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
Europe news			culture, politics										
1.5.d Summary of key frames Europe social media mentions, SMA	Culture, health, social	N/A	Health, economy, culture	Health, economy, politics	Health, economy, politics	Health, economy, politics	Culture, health, social	N/A	Health, economy, culture	Health, economy, politics	Health, economy, politics	Health, economy, politics	Culture, health, social

Source: Prepared by the Core Team

6.1.1.2. Theme-specific perceptions

The section on theme-specific perceptions (2) looks specifically at how the public perceived the EU's performance (effectiveness) and role (actorness) within the bloc and in global arena, with regard to the specific themes being analysed in this study.

The themes analysed include: economy and trade (2.1); politics and security (2.2); development – including the social internal and international dimensions (2.3.); social – including migration, multiculturalism and human rights (2.4.); environment (2.5.); science, research and technology (2.6); culture (2.7); and education (2.8.)

TABLE 18. CHANGE AND CONTINUITY IN THEME-SPECIFIC PERCEPTIONS

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
2.1. Economy and trade													
2.1.a. Effectiveness Media evaluation of EU economy	N/A	Positive 47%/Negative 11%	N/A	N/A	Positive 42%/Negative 12%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
2.1.b Effectiveness EU effectiveness in creating employment opportunities, PO (%)	Good 82% ↑↑ Bad 4%	Good 55% ↑↑ Bad 8%	Good 76% Bad 4%	Good 59% Bad 6%	Good 82% Bad 3%	Good 88% Bad 1%	Good 41% ↑ Bad 10%	Good 89% Bad 2%	Good 80.5% ↑↑ Bad 3%	Good 53% ↑↑ Bad 9%	Good 74% ↑↑ Bad 7.9% ↓	Good 50% ↑ Bad 11%	Good 39% Bad 9%
2.1.c Effectiveness EU effectiveness in reducing income inequality, PO (%)	Good 67% Bad 9%	Good 43% ↑ Bad 11%	Good 59% Bad 9%	Good 47% ↓ Bad 13%	Good 79% ↑↑ Bad 5%	Good 78% Bad 4%	Good 31% Bad 13%	Good 79% Bad 6%	Good 65.5% ↑ Bad 7%	Good 38%↑ Bad 17%↓	Good 57% ↑ Bad 11%	Good 41% Bad 15%	Good 35% Bad 11%
2.1.d Actorness EU actorness in global economic affairs, PO (%)	Influential 87% Not 5%	Influential 69% Not 19%	Influential 89% Not 10%	Influential 68%↓↓ Not 23% ↑	Influential 85% ↑ Not 13%	Influential 92% Not 8%	Influential 61% Not 26%↑	Influential 95% Not 4%	Influential 85% Not 13%	Influential 70% Not 24%	Influential 86% Not 11%	Influential 76% Not 19%	Influential 63% Not 15%
Trade													
2.1.e Effectiveness EU effectiveness in global trade, PO (%)	Good 88% Bad 3%	Good 68% Bad 5%	Good 85% Bad 2%	Good 67% ↓ Bad 3%	Good 90% ↑ Bad 1%	Good 91% Bad 2%	Good 56% ↑ Bad 6%	Good 97% Bad 0%	Good 85.5% Bad 2%	Good 72% Bad 7%	Good 86% Bad 2%	Good 57% Bad 7%	Good 51% Bad 5%
2.1.f Actorness Importance of EU as trading partner, PO (%)	Important 75% Not 6%	Important 70% ↑ Not 4%	Important 73% Not 5%	Important 79% ↓ Not 2%	Important 88% Not 2%	Important 89.5% Not 2%	Important 62% ↑ Not 8%	Important 87% Not 3%	Important 76.5% ↑Not 6%	Important 68%↑ Not 8%	Important 78% Not 4.7%	Important 70.5% Not 6%	Important 61% Not 3%
2.2. Politics and security													
2.2.a Media evaluation of EU in politics MA (%)	N/A	Positive 39%↑↑ Negative 12%	N/A	N/A	Positive 44%↑↑ Negative 9% ↓	N/A	N/A	Positive 6% Negative 1%	N/A	N/A	Positive 46%↑↑ Negative 15%	N/A	Positive 29% Negative 37%
2.2.b Effectiveness Likelihood of EU leadership in global affairs, PO (%)	Likely 72% Not 9%	Likely 54% Not 11%	Likely 76% Not 7%	Likely 50% ↓ Not 12%	Likely 78% Not 3%	Likely 84% Not 3%	Likely 37% Not 14%	Likely 90% Not 3%	Likely 75% Not 7%	Likely 58% Not 18%	Likely 74% Not 8%	Likely 51% Not 10%	Likely 50% Not 8%
2.2.c Actorness Desirability of EU global leadership, PO (%)	Desirable 68% Not 12%	Desirable 55% Not 12%	Desirable 75%	Desirable 32% ↓	Desirable 79.5%↑ Not 4%	Desirable 74% Not 6%	Desirable 38%	Desirable 90%	Desirable 69%	Desirable 33%	Desirable 72%	Desirable 44%	Desirable 53%

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
			Not 6%	Not 14%			Not 12%	Not 3%	Not 7%	Not 28%	Not 9%	Not 9%	Not 7%
<i>Peace and security</i>													
2.2.d Effectiveness EU effectiveness in fight against terrorism, PO (%)	Good 75% Bad 8%	Good 50% Bad 11%	Good 66% Bad 8%	Good 44% ↓ Bad 18%↑	Good 79%↑ Bad 5%	Good 78% Bad 4%	Good 36% Bad 13%	Good 80% Bad 8%	Good 70% Bad 6%	Good 46%↑↑ Bad 18% ↓	Good 63% Bad 11%	Good 44% Bad 16%	Good 40% Bad 13%
2.2.e Effectiveness EU effectiveness in military operations, PO (%)	Good 66% Bad 6%	Good 44% Bad 10%	Good 55% Bad 5%	Good 33% ↓ Bad 19%↑	Good 77% Bad 4%	Good 76% Bad 4%	Good 36% Bad 9%	Good 83% Bad 3%	Good 64% Bad 4%	Good 30% ↑ Bad 25%↓	Good 63% Bad 6,6%	Good 33.5% Bad 13.5%	Good 39% Bad 11%
2.2.f Effectiveness EU effectiveness in peacekeeping operations, PO (%)	Good 73%↑ Bad 6%	Good 53% Bad 9%	Good 68% Bad 6%	Good 39%↓↓ Bad 11%	Good 74% Bad 6%	Good 87% Bad 2%	Good 45% Bad 7.5%	Good 86% Bad 5%	Good 70.5% Bad 5%	Good 31%↑ Bad 24%↓	Good 68% Bad 8%	Good 49% Bad 10%	Good 43% Bad 8%
2.2.g Actorness EU actorness in global peace and security, PO (%)	Important 90%↑ Not 3%↓	Important 75% Not 16%	Important 90%/10%	Important 74% Not 21%↑	Important 83%↑ Not 16%	Important 92% Not 6%	Important 68% Not 19%	Important 96% Not 3%	Important 88% Not 10%	Important 64%↑ Not 29%↓	Important 83% Not 13%	Important 77% Not 18%	Important 67% Not 14%
<i>2.3. Development (social internal and international)</i>													
2.3.a Effectiveness EU effectiveness in development cooperation, PO (%)	Good 67% Bad 10%	Good 48% Bad 10%	Good 64% Bad 8%	Good 47%↓↓ Bad 13%	Good 80% Bad 5%	Good 84% Bad 2%	Good 39% Bad 10%	Good 84% Bad 2%	Good 62% Bad 6%	Good 39% ↑ Bad 19%↓	Good 65% Bad 10.5%	Good 37%/13%	Good 44% Bad 6%
2.3.b Actorness EU actorness in development cooperation, PO (%)	Important 90% ↑↑ Not 7%↓	Important 73% Not 15%	Important 85% Not 13%	Important 76% ↓ Not 19%	Important 85% ↑ Not 5%	Important 94% Not 5%	Important 68% Not 17%	Important 96% Not 2%	Important 84.5% Not 13%	Important 57% ↑ Not 30%↓	Important 86% Not 11%	Important 78% Not 16%	Important 60% Not 18%
<i>2.4. Social (migration, multiculturalism and human rights - incl. gender equality)</i>													
2.4.a. Media evaluation of EU in social	N/A	Positive 44% Negative 13%	N/A	N/A	N/A	Positive 52% Negative 8%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2.4.b Effectiveness EU effectiveness in dealing with refugees, displaced people, PO (%)	Good 58%	Good 44% ↑ Bad 15%	Good 60%	Good 42% ↓	Good 70% Bad 7%	Good 76% Bad 4%	Good 39%	Good 81%	Good 59%	Good 37% ↑	Good 56.5%	Good 37% ↑	Good 33%

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
	Bad 18%		Bad 9%	Bad 13%			Bad11 %	Bad4 %	Bad 9%	Bad 25%↓	Bad 15.5%	Bad 13%	Bad 13%
2.4.c effectiveness EU effectiveness in protection of minorities, PO (%)	Good 62% ↑ Bad 11%	Good 46% ↑ Bad 11%	Good % Bad 8%	Good 41% ↓ Bad 12%	Good 75%↑ Bad 5%	Good 73.5% Bad 5%	Good 35% Bad 11%	Good 86% Bad 4%	Good 64% ↑ Bad 6%	Good 50% Bad 11%	Good 60% ↑ Bad 12%	Good 46.5% Bad 12%	Good 35% Bad 10%
2.4.d actorness EU actorness in human rights, PO (%)	Important 91% ↑↑ Not 7% ↓	Importa nt 75% Not 13%	Impor tant 91% Not 8%	Impor tant 78% Not 15%	Importa nt 87% ↑ Not 10%	Importa nt 93% Not 4%	Impor tant 69% Not 17%	Impor tant 98% Not 1%	Impor tant 85% Not 12%	Impor tant 66% ↑ Not 24% ↓	Impor tant 86% Not 19%	Good 79% Bad 14%	Good 65% Bad 15%
Gender equality													
2.4.e Effectiveness EU effectiveness in promoting equality between men and women, PO (%)	Good 72% Bad 6%	Good 55% Bad 7%	Good 72% Bad 5%	Good 56%↓↓ Bad 8%	Good 84%↑ Bad 4%	Good 84%↑ Bad 2%	Good 54% Bad 7%	Good 89% Bad 2%	Good 78% Bad 4%	Good 50% Bad 10%	Good 70% Bad 8%	Good 53% Bad 10%	Good 45% Bad8 %
Environment													
2.5.a Effectiveness EU effectiveness in environmental protection, PO (%)	Good 76%↑↑ Bad 6%	Good 56%↑ Bad 8%	Good 75% Bad 5%	Good 60%↓ Bad 8%	Good 80% Bad 4%	Good 88% Bad 4%	Good 48% Bad 8%	Good 92% Bad 1%	Good 76%↑ Bad 4%	Good 52% ↑↑ Bad 10.5%	Good 77.2% ↑ Bad 6.5%	Good 56% Bad 8.5%	Good 39% Bad 7%
2.5.b Actorness EU actorness in environment and energy, PO (%)	Important 90%↑↑ Not 8%↓	Importa nt 75% Not 14%	Impor tant 92% Not 7%	Impor tant 79% Not 16%	Importa nt 87% Not 12%	Importa nt 94%↑ Not 4.5%	Impor tant 69% Not 19%	Impor tant 96% Not 3%	Impor tant 89%↑ Not 9%	Impor tant 71%↑↑ Not 19%	Impor tant 87%↑ Not 10%	Impor tant 79% Not 16%	Impor tant 62% Not 16%
2.6. Science, research and technology													
2.6.a Effectiveness EU effectiveness in science, research and technology, PO (%)	Good 88%↑ Bad 2%	Good 62% Bad 6%	Good 82% Bad 3%	Good 67%↓↓ Bad 5%	Good 89% Bad 2%	Good 92% Bad 2%	Good 48% Bad 7%	Good 95% Bad 0%	Good 84% Bad 2%	Good 67.5% Bad 4%	Good 81% Bad 3.5%	Good 57% Bad 7%	Good 48% Bad 6%
2.6.b Actorness EU actorness in science, research and technology, PO (%)	Important 91%↑ Not 7%	Importa nt 71% Not 16%	Impor tant 88% Not 3%	Impor tant 78%↓ Not 15%	Importa nt 87% Not 10%	Importa nt 93% Not 6%	Impor tant 66% Not 19%	Impor tant 96% Not 3%	Impor tant 89% Not 8.5%	Impor tant 70% Not 21%	Impor tant 86%↑ Not 10%	Impor tant 75% Not 18%	Impor tant 62% Not 19%

INDICATOR	BRA	CAN	COL	CHN	IND	IDN	JPN	NGA	MEX	RUS	ZAF	KOR	US
2.7. Culture													
2.7.a Effectiveness Attractiveness of EU countries' culture and lifestyle, PO (%)	Attractive 88% Not 8%	Attractive 71% Not 18%	Attractive 93% Not 6%	Attractive 67% Not 28%	Attractive 84% Not 4%	Attractive 87% Not 13%	Attractive 56.5% Not 28%	Attractive 90% Not 8%	Attractive 89.5% Not 8%	Attractive 76% Not 15%	Attractive 79% Not 18%	Attractive 68.5% Not 25%	Attractive 67% Not 16%
2.7.b Actorness Europe actorness in arts, PO (%)	Important 55% Not 16%	Important 62% Not 8%	Important 53% Not 14%	Important 60% Not 5%	Important 77% Not 4.5%	Important 78% Not 6%	Important 61% Not 7%	Important 56% Not 23%	Important 67% Not 7%	Important 73% Not 3.5%	Important 58.15% Not 16.8%	Important 61% Not 8%	Important 52% Not 7%
2.8. Education													
2.8.a Effectiveness EU's effectiveness in education, PO (%)	Good 88% Bad 3%	Good 70% Bad 5%	Good 85% Bad 4%	Good 74% Bad 3%	Good 87% Bad 1%	Good 94% Bad 1%	Good 55% Bad 7%	Good 95% Bad 0%	Good 87% Bad 2%	Good 63.5% Bad 9%	Good 84% Bad 4.5%	Good 62% Bad 7%	Good 52% Bad 4%
2.8.b Actorness EU actorness in education, PO (%)	Important 73% Not 6%	Important 60% Not 7%	Important 69% Not 5%	Important 67% Not 5%	Important 77% Not 4%	Important 90% Not 1%	Important 48% Not 10%	Important 80% Not 4%	Important 70% Not 6.5%	Important 51% Not 15%	Important 67% Not 9.2%	Important 60% Not 8%	Important 51% Not 6%

Source: Prepared by the Core Team.

6.1.2. Databases per target country

The 13 databases are submitted together with the report. These databases are in Excel format, and each includes the indicators themselves, as listed in this section:

- A description of each of the indicators, explaining what they measure;
- The source – which of the methods used in the study was used to measure the given indicator, listing the specific subject matter of the question (in the case of the public opinion poll) or measurement category used (media analysis and social media analysis);
- Measurement – explanation as to how the indicator was measured, and whether it is a categorical indicator, numerical, or a percentage
- The values for 2015 and 2021– as measured in the answers to the public opinion poll and media analysis
- Answer options (where applicable) – the answer options available to respondents (public opinion poll) and the media experts (media analysis). Answer options also contain information on the changes that were introduced into the 2021 study, and information on comparability of the results.
- Notes – any additional notes on how the measurement was made, where such additional explanations are needed.

Aggregated Policy Recommendations

7.1. Introduction

The recommendations presented in this section are an aggregated version based on a **number of inputs** detailed in the Final Report (Volume I and II) and its Annexes:

- individual country outputs (see Volume II: Country Cases Studies in this Report);
- a range of results from methods deployed across the 13 countries (interviews with national experts and decision-makers, focus groups with students, traditional and social media analyses and public opinion surveys) (Annexes II-VII of this report);
- interviews with public diplomacy practitioners in EU Delegations in the 13 key partner countries (see Annex I of this report);
- overview of the EU public diplomacy initiatives (2015-2021) (see Annex I of this report);
- literature on external perceptions of the EU (2015-2021) (See Annex I of this report);
- comparison with the policy recommendations of the Baseline Study 2015;
- country-specific recommendations devised by Country Experts (Volume II of this report).

Quality control. The aggregated recommendations have been reviewed and revised by the members of the Quality Assurance Team (leading experts on EU external perceptions, EU foreign policy and public diplomacy). They are informed by the peer-reviewed country-specific recommendations devised by Country Experts. The aggregated policy recommendations were revised following the presentation of the Draft Final Report to the Client and EU foreign policy and public diplomacy stakeholders.

Two conceptual visions of public diplomacy. In our mapping of EU perceptions and their evolution and in the design of the policy recommendations, we understand that there are two conceptual visions of public diplomacy – as a **strategic communication** and as a **tool for dialogue and relations** (Figure 13 below).

FIGURE 13. SITUATING PUBLIC DIPLOMACY (BASED ON GREGORY, 2008; SNOW, 2009; ZAHARNA, 2009)



Neither practice nor scholarship can agree which of both should guide the approach to public diplomacy. The Update Study 2021 has inherited this ambiguity, but it addresses both in its design and in policy recommendations.

7.2. Setting policy recommendations

Aggregated recommendations are **not a prescription, but a structured “menu of choice”**: they combine new suggestions and stress already existing initiatives, perceived internally and externally as best practice.

- EU Delegations are already successfully undertaking many of the activities listed in this section. Yet, not all listed recommendations are carried out by all Delegations. Initiatives are already listed here if internal and external receivers report positive perceptions of existing initiatives to create a *toolbox of best practices* that can support the development of an EU public diplomacy strategy.

Aggregated recommendations are informed by the empirical findings of the multi-method study.

- Empirical findings are the leading input into the policy recommendations. All methods in the Update Study 2021 are informed by the same set of the guiding indicators as the Baseline Study 2015. They are also informed by the existing concepts in the field of public diplomacy.

There is no single/best/one-fit-all approach across all countries.

- The list of recommendations is extensive as every location in the Update Study has a unique set of perceptions of the EU and recommendations that follow.

Long-term strategy-oriented recommendations and short-term practice-oriented public diplomacy recommendations.

- The long-term policy recommendations outline recommendations of strategic character, while short-term practice-oriented recommendations aim at a tactical and operational level. They should be considered together and work in interaction with each other – practice-oriented recommendations have firm roots in policy-level aims and objectives.

Presentation of the aggregated recommendations are contextualised by “5Cs” (Figure 14).

FIGURE 14. CONTEXTUALISING RECOMMENDATIONS: THE 5CS



COMPLEXITY OF GLOBAL COMMUNICATION LANDSCAPE

CONTEXT

The global communication landscape “upsets” the projection – dissemination – reception logic

International communication is increasingly impacted by fragmented information flows produced by multiple narrators on state and non-state levels, domestic and global. This dynamic impacts public diplomacy practice. Narrative formulation, projection and reception are of heightened importance in a world of growing geo-political rivalry, economic competition, increasing multipolarity and normative contestation.

LONG TERM

The EU will have to understand, master and interact “through” this landscape

Upgrade the EU’s strategic narrative that builds on policies perceived positively by key partners. Fine-tune the projection of the narrative regularly by *incorporating external reception* on the systemic (how the world is arranged), identity (norms and values) and issue-specific (informed by concrete policies) levels. Invest into assessment and practice of *alignment* between narrative levels - critical for higher effectiveness of the narrative – as well as alignment with policies and how the EU acts internationally.

A coherent, positive and attractive narrative is of even higher importance during crises. The Update Study 2021 finds a strong and visibly negative portrayal of the EU in agenda-setting media and social media in the context of the COVID-19 pandemic. The pandemic continues to test the power and attractiveness of the EU’s narrative and challenges the resilience of its image. External opinion-makers frame the EU as an actor that underperforms internally, mishandling the pandemic despite available resources in the EU, as well as an international actor hurting the key partners by its “Europe first” approach when it comes to access to vaccines. While this study has gauged a slight improvement in COVID -related perceptions of the EU, in the long term, effect of the COVID d-19 pandemic on the image of the EU calls for “Blue Skies” exercises at a strategic level and reviewed by peers and an external panel to examine the extent of the impact of COVID -19 on external perceptions (the impact of Covid on practice of public diplomacy by digital means is discussed in the section “COVID -19 and digital diplomacy” below).

PRACTICE/
SHORT-TERM

EU public diplomacy takes place in the age of the new media ecology characterised by fragmented information flows in the context of infodemic, mis- and dis-information. In the era of battles of narratives and perceptions, and especially at times of multiple crises, effective communication impacts receivers on cognitive, affective and normative levels is a cornerstone of effective public diplomacy.

- The scale and complexity of the new media environment means that EU Delegations cannot be effective on their own. They must cooperate and collaborate with local actors in an effective, meaningful for both sides and creative manner, engaging in respectful dialogue.
- There is no one recipe how to boost the profile of the EU in local media – it will always depend on the nature of newsmaking, the nature of relations between EU Delegation and the local media on multiple channels, as well as overarching factors of political regimes and media environments in third countries.

<p>Devise a strategic narrative approach that frames common message based on values and interaction <i>with</i> partners formulated through resilient vision of what the EU wants to be in the future</p>	<p>Initiate/sustain knowledge exchange and best practice sharing platforms on the ground in third countries on key areas such as climate change, green tech and scientific innovation (for example in health) by bringing together local and EU stakeholders: to advance the EU's "listening" position and create a positive story around collaboration and coordination</p>	<p>Fine-tune and diversify location-specific media outreach programmes and a multi-channel coordinated strategy in collaboration with opinion-makers in each location</p>
<p>Offer "storylines" of the EU to external partners developed from past to future and with a space for respective dialogue and exchange</p> <ul style="list-style-type: none"> ▪ <i>focus on shared principles among EU Member States, e.g. "set in stone" norms and values that are appreciated by external audiences and remain intact irrespective of crises faced by the EU or complex domestic negotiations among/with EU Member States.</i> 	<p>Undertake regular "listening" on a more sophisticated comprehensive level so as to compensate for the traditionally dominant message-driven public diplomacy model</p> <ul style="list-style-type: none"> ▪ regularly monitor a range of influential media voices on key areas in each location: traditional media (print and broadcast (TV and radio)), online media and social media – and <i>in collaboration with local experts.</i> ▪ systematically account for <i>a range of media content</i> on the key areas as there is a generational and cohort difference in the media use. ▪ observe framing of key areas in leading <i>national and regional</i> media sources. ▪ conduct <i>regular analysis of all social media channels</i> used by the EU Delegation, and specifically the <i>reception</i> of issues in the key areas. ▪ Explore <i>differences in reception</i> between more mundane periods and critical times. 	<p>Continue to invest into cultivating close and regular dialogue and mutually beneficial cooperation with local opinion-makers on different levels and generations, with different functions and on different media channels</p> <ul style="list-style-type: none"> ▪ systematic media monitoring of traditional media in Update Study 2021 identified <i>the most prolific journalists writing about the EU/Europe</i> in each location. Engage and celebrate these journalists following public consultations, ▪ continue with <i>awards for peer-reviewed outstanding journalism in the coverage of the EU/Europe.</i> Engage local experts in the awards process, ▪ Conduct a <i>regular mapping of newsmakers' perceptions of the EU</i> affiliated with leading agenda-setting international media which are often used as international news sources about the EU. Update Study 2021 identified a set of international sources that shape media image of the EU in third countries.
<p>Adapt these narratives with a finite set of core messages about the EU for each EU Delegation</p>	<p>Cooperate and coordinate with EU Member State Embassies to third countries in "listening"</p>	<p>Continue to be proactive in communicating the EU to the opinion-makers by creating events and opportunities that may grasp media attention (in a</p>

<ul style="list-style-type: none"> ▪ The findings from the interviews with decision-makers across locations clearly indicate that narratives and core messages must encompass messages about: <ul style="list-style-type: none"> ○ common areas of interest with the partner country, ○ clearly stated goals of the EU in the location in question, ○ the envisioned future of bilateral and multilateral partnerships with the key partners, ○ key topics, and key audiences that the EU Delegations wants to work with 	<ul style="list-style-type: none"> ▪ organise a <i>shared media monitoring programme</i> tracking images of the EU and EU Member States in the key areas at the same time, ▪ facilitate <i>common approach to analytics</i>, ▪ track representations of <i>synergies and clashes</i>, ▪ discuss local media framing of the European actors in key areas at joint <i>coordination meetings with a focus on strategic communication</i> 	<p>positive manner). Engage in a sincere auto-critical dialogue with the local media professionals</p> <ul style="list-style-type: none"> ▪ invite <i>journalists for discussion seminars and meetings at the EU Delegation</i> (not just press conferences which are often perceived as an exercise in advocacy/monologue). Regular diverse dialogues help with a pro-active messaging should there be a crisis situation, ▪ support <i>professional tours/fellowships of journalists to the EU</i> – to EU Headquarters in Brussels as well as to media organisations in Europe (in person or virtual exchanges if situation remains unsafe), ▪ invite the most prolific journalists and editors-in-chief of the local agenda-setting media to <i>small-group meetings with senior diplomats</i> from EU Delegations, and potentially from EU Member States Embassies, and <i>VIPs from the EU</i> (visiting in person or coming virtually).
<p>Test the reception of the overarching narrative and its local modification on various key audiences before launching into location-specific national outreach</p> <ul style="list-style-type: none"> ▪ Ensure local linguistic and cross-cultural expertise of the highest quality, to render the key concepts appropriately for the EU and partner locations. 	<p>Involve local communication experts/academics (as consultants) and students of media and communication to conduct national and regional media monitoring of the EU in the key areas using latest methods/tools in communication field</p> <ul style="list-style-type: none"> ▪ create distinct <i>local monitoring programmes in collaboration with local experts</i> with dedicated support for this purpose. ▪ invite local experts and communication students to <i>report the findings on a regular basis</i>, to the EU Delegation as well as joint coordination meetings, to discuss the findings and develop location-sensitive follow up 	<p>Cultivate special relationships with the journalists who write a lot about the EU on a range of topics</p> <ul style="list-style-type: none"> ▪ <i>invite them regularly to the events</i> organised by the EU Delegations (seminars, receptions, public lectures, etc.); ▪ <i>regularly tweet</i> to these journalists (previous perceptions studies have indicated that Twitter is the top social platform that alerts the newsmakers about “hot” issues). Use the equivalent channels in locations where Twitter is not used,

<p>Regularly demonstrate in different local channels how the leading narratives connect to policy: ‘what counts is not what you say, but what you do’ (Cull 2019). Inconsistency is highly “punished” within key external audiences.</p>	<p>Conduct a comparative comprehensive large-scale study of EU external images in influential international media in next five years</p> <ul style="list-style-type: none"> ▪ test if the revised/updated/upgraded public diplomacy has results in actual improvement of the image of the EU (image is challenged in 2021 by the Covid pandemic). 	<ul style="list-style-type: none"> ▪ always <i>invite these journalists when EU VIPs are visiting</i> (or joining local events by virtual means) <p>Devise a separate outreach programme for media gatekeepers – editors-in-chief and TV and radio directors of news as well as media owners of popular influential media as information flows are often controlled vertically</p> <ul style="list-style-type: none"> ▪ devise a <i>regular series of discussions facilitated by EU Delegations</i> between newsmakers and gatekeepers with other key stakeholders on the most pertinent topics in bilateral relations, including sensitive and controversial ones, ▪ <i>invite newsmakers and gate-keepers to multiple social events</i> organised by the EU Delegation and EU Member States – not necessarily for reporting but for socialisation and networking.
<p>Communicate the EU proactively by revisiting bridges/links between new policies, programmes and initiatives in the partner countries and updates/reports of the progress of the older initiatives</p> <ul style="list-style-type: none"> ▪ This synergy (observed in the case of perceptions in the countries with completed trade agreements or major political agreements) increases the EU’s visibility and shapes a positive message of its ongoing relevance for the partner country. 	<p>Continue to build media monitoring and analysis capacity inside EU Delegations</p> <ul style="list-style-type: none"> ▪ increase the awareness of the monitoring tools and approaches ▪ provide relevant training to staff 	<p>Devise regular programmes to collaborate with the next generation of opinion-makers in the key partner countries</p> <ul style="list-style-type: none"> ▪ devise a series of events to engage in <i>dialogue and cooperation with early-career journalists</i>, ▪ organise targeted <i>seminars, workshops and brainstorming</i> at EU Delegations on the most current – and potentially controversial – topics with this group of early-career opinion-makers; invite <i>leading European journalists and editors as guest speakers</i> with the objectives to share tips how to succeed in

the field but also increase the networks for young media professionals,

- provide an *opportunity for early-career local journalists to publish/broadcast in European media*. This opportunity is of particular importance as *international mobility of early-career journalists is now curtailed* due to Covid and engagement with European colleagues will address this gap.
- engage with *capital-based and region-based early-career media professionals*.
- devise/continue with an outreach programme to link with *students of media and communication in national universities across regions*.
- organise in EU Delegations a set of *short-term or small-scale projects to increase the outreach* to a larger number of students of media and communication (e.g. focused internships and projects on media monitoring, social media analytics, help in organisation and strategic communication of high-profile events by EU Delegation, etc.). Invite students to report to EU diplomats upon completion of the projects; engage in an open dialogue with the students,
- support a range of *educational exchanges* between media and communication students in the EU and the key partners:
 - support media and communication university courses that feature *collaborations with EU universities* (e.g. guest speakers, joint assessment, jointly taught courses, etc.)

		<ul style="list-style-type: none"> ○ support local high-level <i>post-graduate research that focuses on communication exchanges between the EU and third country</i> (e.g. a dedicated Masters/PhD scholarship). Involve local experts in the selection process. Invite students to report the findings to EU Delegation, with recommendations.
	<p>Undertake a multi-channel strategy. Move away from uncoordinated set of communications on parallel platforms: coordination of such activities in multi-channel strategies can multiply impact</p> <ul style="list-style-type: none"> ▪ in all EU Delegation channels, highlight the EU's achievements <i>with consistent 'local hook' to the location,</i> ▪ post and repost <i>every day</i> on all accounts, ▪ post and repost <i>from Embassies of the EU Member States' accounts,</i> especially on the issues that resonate with the needs of the EU and strategic partners (i.e. with 'local hook'), ▪ post and repost <i>on other EU accounts/channels</i> in order to create an interconnected web of users, ▪ post and repost <i>on general accounts/channels,</i> for example in regards to particular events with global visibility (e.g. G7 summits, UN Climate Conventions, etc.). These engage a wider audience, and can also potentially increase number of followers, ▪ post and repost <i>on wider networks meaningful for third countries;</i> use <i>national and regional</i> networks and events, ▪ <i>synchronise online activities</i> by EU Delegations with Headquarters and Member States in a strategic manner, avoid repetition and complement each other's messaging 	<p>Explore best practices and devise programmes of cooperation with online influencers</p> <ul style="list-style-type: none"> ▪ <i>map existing best practices</i> among EU Delegations, EU Member States Embassies as well as non-EU diplomatic actors; regularly update recommended approaches (and mitigation strategies when this collaboration does not work), ▪ <i>identify and regularly update the list of the top influencers in the relevant for the EU key areas</i> in each location ▪ include outreach to online influencers <i>as a regular point of discussion at the coordination meetings</i> between the EU Delegations and EU Member States

Continue to use social media to engage in an active dialogue with wider groups of the general public

- engage in *active regular dialogic* communication on all channels with the general public,
- release social media communications *strategically* to *narrate and reinforce an appealing positive narrative*,
- use *the concept of “Europe”* as a vehicle to deliver messages about *the EU as a successful actor in cultural and social affairs as well as sports*. The Update Study 2021 finds these issue-areas to be dominated by external public’s associations with Europe,
- undertake *regular social network analysis of all social media channels* to identify influencers to engage with them in regular dialogue and discussion to raise visibility with the general public and enhance impact. Develop and follow a strategy on selecting and engaging social media influencers.
- use analytics to *detect/eliminate trolls regularly*,
- engage with experts (including local experts) in *regular skills upgrades in analysing infodemics and counteracting mis- and dis-information*,
- engage in dialogues with the general public *on all channels after each major event* (global, regional, local, regional or in the EU).

Continue to assist local opinion-makers to learn new information about the EU’s key areas while informed by an understanding of the values and codes of conduct operating in each media environment

- *continue with the practices of press releases, press conferences and (e-)newsletters*. Research indicates that the newsmakers in third countries are willing to consider EU press-releases if the press-releases are in a native language, informative, detailed, not boring – and released within at least an hour of the major event/crisis/ drama,
- *develop contacts with and provide regular updates to leading news-making agenda-setting sources*. The information should resonate with those outlets’ mission/focus. Even if the information is not published, this will help to facilitate a relationship and dialogue,
- continue to practice a *proactive* approach on multiple channels:
 - secure regular interviews (preferably in most popular outlets and programmes on TV and radio),
 - place op-eds (in high-circulation newspapers and journals across political continuum and genres),
 - provide support to visiting EU VIPs in linking them to high-impact local media,
 - provide some updates *before* the major news hits the pages and screens of the national or global media

- *maximise EU VIP visits.* The top-level EU visitors are to outreach to media in an open, dialogue-based mode. The VIPs should demonstrate ability for auto-criticism as well as cultural sensitivity. The local “hook” is paramount. Use e-tools to connect the VIPs to regions and regional media specifically.
- *share most effective approaches, contacts and cases at the coordination meetings* and debrief unsuccessful outreach

7.2.1. CO-CREATION

CONTEXT

Public diplomacy is no longer projection alone – it needs to be “co-created” with partner countries

Growing multipolarity and proliferation of international actors on the world stage (state and non-state) mean increased competition for influence and contestation. Actors around the world want *to be heard*. They also do not want to be passive receivers of messages and actions only – but meaningful *co-creators* of the mutually beneficial initiatives and relations.

The Update Study 2021 finds that national experts, educated youth and the general public demonstrate awareness of geo-political competition for influence. The US and China are seen as winning this battle. The Update Study also shows that history and especially colonial experiences still affect the perceptions of contemporary relations.

LONG TERM

Public diplomacy becomes a collaboration project with shared leadership

The EU Delegations have the knowledge of local contexts and local actors as well as skills and expertise to reach out. Ensure that this knowledge and these skills are used to keep moving from *monologue-dialogue-collaboration* to *empathetic monologue -- genuine dialogue where both sides learn from each other – mutually beneficial collaboration with shared leadership*.

Commit to *creating spaces useful for both the EU and local partners*, where EU activities help to sustain local networks in their own spaces meeting local priorities and entrenching shared values working together towards common goal.

PRACTICE/
SHORT-TERM

The Update Study 2021 demonstrates that the issues-areas are no longer compartmentalised, but “blended” – with inputs from many themes (e.g. EU trade activities are perceived to be intrinsically linked to the environment, research and innovations, political norms and geo-political competition. For more examples, see Section 1.2 of the Final Report). In these contexts, local expert networks are particularly influential potential partners and multipliers for the EU outreach. They serve as knowledge “hubs” and complement physical exchange programmes between the EU and partner countries.

<p>Begin all major public diplomacy activities, innovations and strategies with <i>systematic open-ended listening</i></p>	<p>Position EU delegations in the role of the network facilitator and information manager: credible trustworthy partner and leader demonstrating genuine empathy, and particular in response to crises of different scope</p>
<p>Run location-specific annual analysis of opinions and perceptions of the EU in third countries among key audiences and compare across them and compare across them across time and groups</p> <ul style="list-style-type: none"> ▪ Employ a range of listening techniques and methods in each location: <ul style="list-style-type: none"> ○ traditional and social media analysis ○ focus groups with key target groups of stakeholders, influencers and multipliers; ○ surveys of the general public opinion ○ interviews/informal conversations with policy- and decision-makers. 	<p>Involve local experts in the co-design of public diplomacy initiatives</p> <ul style="list-style-type: none"> ▪ <i>Establish a team of secondees:</i> offer local experts and stakeholders EU Delegation placements on topics of interest to those stakeholders – a special opportunity in normal times, and unique at times of Covid when real exchanges are not possible. ▪ Co-establish and co-run with local experts <i>regular discussions/open-ended dialogue formats/interactive platforms with local influential actors</i>, such as academics, policymakers, think tankers, media, leaders of civil society, youth, business and culture leaders who may act as multipliers as well as mediums to explain shifts in (public) perception and evaluation of the EU in general, or its specific policies. They could be run face-to-face, virtually or in a hybrid format. Give these interactive platforms a title to make them more visible and meaningful locally. ▪ Interviewed decision-makers recommend to engage in <i>open discussions with a range of political actors</i> in each location, including, opposition parties, new political parties, youth political organisations, student organisations, minority and women political groups, etc. through regular thematic roundtables and workshops with a key discussion event (face-to-face, virtual or blended/hybrid – <i>co-organised with the local actors</i>). ▪ Run conferences/roundtables via virtual and social media channels co-organised <i>in equal partnership with the local interested organisations</i>. ▪ Establish a working group of a diverse range of stakeholders that serves as a <i>“critical friend”</i>.
<p>Involve local experts – carriers of a unique knowledge of local culture and contexts – into design and implementation of regular listening activities</p> <ul style="list-style-type: none"> ▪ invite local experts to share insights on <i>how to make the EU relevant and credible to different local audiences in third countries</i>; 	<p>Involve local experts into creating multiple platforms for interested experts to interconnect, exchange ideas and share information on selected policy fields that are relevant to EU public diplomacy.</p> <ul style="list-style-type: none"> ▪ <i>Co-create these platforms with local experts. Start with the experts who are interested in and/or already engaged with the EU:</i> including academics from multidisciplinary backgrounds, journalists who specialise in reporting Europe/the EU, editors of the

<ul style="list-style-type: none"> ▪ invite local experts to provide location-specific feedback on how to communicate the EU on the ground in a consistent, constant, respectful and cordial manner. 	<p>media outlets who publish a lot about Europe/the EU, NGOs who have European partners or European support, secondary school educators who teach about Europe/the EU, business leaders, politicians and local community leaders who have stakes in relations with Europe/the EU, social media influencers who talk about Europe-related topics, etc.</p> <ul style="list-style-type: none"> ▪ <i>Let local experts lead.</i> The experts claim they are ready to assist. Consult the experts on how to anchor centrally-formulated messages. ▪ Interviewed experts and students recommend to include <i>regularly-updated information about EU projects</i>, calls for proposals and funding and requests for collaboration on the shared platforms to keep the track of existing and potential partners up-to-date.
<p>Design a toolkit prescribing a minimum set of listening activities</p> <ul style="list-style-type: none"> ▪ Coordinate timing to compare across countries and regions 	<p>Launch and test new formats for interacting with stakeholders in the key issue-areas, preferably with the shared or local leadership. The areas singled out by the external receivers are green technologies, education and health science.</p> <p>Some ideas proposed by the interviewed local stakeholders include:</p> <ul style="list-style-type: none"> ▪ an EU-partner country Observatory to study the rule of law; ▪ hubs for innovation, good practices and shared experiences in environmental mitigation; ▪ EU-partner country Green Recovery events to provide a platform for exchange on sustainable development among experts and civil society actors; ▪ EU Trade and Investment promotion office; ▪ European Networks of Education involving various education levels. <p>NB: Some EU Delegations have launched these platforms already, but not all.</p>
<p>Continue with regular large-scale comparatives studies among the key partners every five years (following the Baseline Study 2015 and the Update Study 2021) as a major global-scale comprehensive methodologically-rigorous “listening” exercise.</p> <ul style="list-style-type: none"> ▪ While location-specific “listening” exercises are and will be going on in an incremental manner, a recurrent global study following the set of identical indicators and methods will track continuity and change of perceptions, images and narratives of the EU in a valid and reliable manner. 	<p>Open new sections within EU Delegations for targeted involvement with stakeholders for advising upon:</p> <ul style="list-style-type: none"> ▪ strategies for EU scholarships applications, ▪ science and research diplomacy initiatives, ▪ civil society organisations with grant applications to facilitate partnerships in climate, the environment, sports, cultural sectors, social affairs (including health)

	<p>Establish permanent communication between a partner country and the EU's medicines agencies to exchange on guidelines and strategies to face the pandemic.</p> <p>NB: Some Delegations have these positions already, but not all.</p>
<p>Run regular cross-cultural and historical/sociological trainings for the EU Delegation staff run by local experts on the most effective, culture-sensitive modes of interactions – not lastly due to the rotation of diplomats</p>	<p>Continue and intensify sectoral and regional dialogues and “spotlight projects</p> <p><i>Sectoral dialogues and “spotlight projects</i> are not brand-new type of initiatives but the Update Study 2021 finds they are very well received by key sectors and lead stakeholders – in the capital cities and regionally.</p> <ul style="list-style-type: none"> ▪ Include a range of sectors: those that support, display neutral attitude, and resist/oppose major trading and political frameworks ▪ Continue reaching to <i>regional stakeholders</i>. The Update Study 2021 finds keen interest in the regions, while capitals are sometimes seen as oversaturated with diplomatic presence overall. ▪ Extend <i>reach to rural stakeholders</i> The Update Study tracks suggestions to initiate projects with these stakeholders focusing on support of autochthonous crafts, cultural or recreational tourism, ecotourism, eco-sport practices and the gastronomy.
<p>Engage in open-ended, unhindered discussions with local movers and shakers (“honest” is a key word detected in the Update Study 2021) demonstrating</p> <ul style="list-style-type: none"> ▪ honest open dialogue with local key stakeholders and multipliers on mundane as well as critical topics, ▪ auto-critical reflections, ▪ credible way to discuss achievements and setbacks, ▪ advanced communication skills across multiple channels, sources and audiences, supported by proficient command of local language(s) 	<p>Ensure that the consultation process, networks and platforms and cross-cultural training involve local early-career professionals from all key groups</p> <ul style="list-style-type: none"> ▪ Engage with <i>early-career professionals who experienced the EU</i> (e.g. alumnus network) and with <i>those who did not experience the EU but are interested in it or are in the key areas</i>. <p>Engage with three ages of youth – school students, university students from a range of disciplines and early-career professionals</p> <ul style="list-style-type: none"> ▪ Engage with youth <i>across regions and in a systematic manner</i> ▪ Facilitate <i>cross-generational dialogue between ages of youth</i> through public diplomacy initiatives – e.g. university students working with school students, early-career professionals working with university students. Outline a set of initiatives where it will be required or highly recommended.

Consider sharp increase in support for exchanges post-Covid between key experts and early career professionals: academics, think tanks, NGOs, media, business leaders, tertiary and secondary school teachers in the key issue-areas for the EU.

- Be consistent following up the key requirement for each beneficiary to *publicise their experiences, dialogues and collaborations with the EU counterparts* – e.g. writing in the local influential media or social media on their discoveries in Europe, presenting at public events about the EU upon their return, etc.

7.2.2. COMMUNITY

CONTEXT

The EU must present itself as a community in the global community

Overall, the EU continues to be perceived as lacking unity and as partially inconsistent within. In 2021, one main theme among national experts, educated youth and leading media in 13 countries comes from reflections on the democratic backsliding in some Member States vis-à-vis the EU (in particular, Hungary and Poland). The perception of the most attractive Member States varies and often relates to historical connections and family ties. Eastern and Central European Member States, as well as smaller Member States and states that joined the EU later once again have minimal visibility (the same trend as in 2015) The general public appears to perceive less visible Member States as less attractive. A new trend here is that local experts start mentioning cooperation with the smaller states – an outlook that has a potential to be developed further.

The Update Study 2021 observed one major change from the 2015 Baseline Report. The competition between EU Delegations vis-à-vis Embassies of EU Member States -- noted as a strong perception in 2015 -- is less of a topic in 2021. In many locations, such competition is not perceived at all. This community approach on the ground is associated with a positive self-reflection (identified in the interviews with EU Delegations).

LONG TERM

Image resilience through 'community of Europe' approach

Continue to synergise efforts across European diplomatic actors on the ground (EU Delegations, EU Members States, other European institutions); maximise communication outreach of each other; complement each others' public diplomacy expertise/action; assist smaller states which may not have diplomatic representations in a key partner country or lack resources for larger-scale public diplomacy actions on the ground. In the eyes of the key audiences more informed about/engaged with the EU on the ground, the community approach between the EU Delegations and EU Members States' embassies are positively received, and seen as critical in the context of the pandemic to ensure a more positive image of a resilient EU. EU Member States are also seen to be better equipped and more experienced in public diplomacy on the ground across a number of locations.

**PRACTICE/
SHORT-TERM**



Continue to combine initiatives with EU Member States embassies	Undertake commonly developed communication strategies	Archive and share best practices
<p>Continue with initiatives that have the EU Delegations in the lead benefitting from pooling together contacts and institutional support of the EU Member States</p>	<p>Regularly and visibly communicate – on diplomatic channels and in local media – common directions for actions and sharing a leading appealing positive narrative across all European partners in the partner country.</p>	<p>Compile a location-specific e-directory of best public diplomacy practices from EU Delegation and EU Member States in each location (following the template of the EUPOP brochures)</p> <p>Update it regularly on an annual basis</p>
<p>Continue with initiatives led by EU Members States, especially those with outreach and resources and specifically in the issue-area of business and culture.</p> <p>In this scenario, the EU Delegation is perceived as an active participant following the lead of the EU Member State.</p>	<p>Develop/sustain a mechanism for communication in crisis that would allow to address unfolding developments swiftly while factoring Member States’ perspectives in a comprehensive manner and local contexts.</p>	<p>Conduct annual retreats on sharing the best practices in public diplomacy among all European partners in each location and even a region – in face-to-face, virtual or hybrid manner.</p>
<p>Use the communal approach to demonstrate leadership in the key areas you identify internally and externally.</p> <p>When a Member State challenges the leading EU narrative, the community on the ground should demonstrate honest and open reaction appreciated by external observers.</p>	<p>Conduct regular institutionalised coordination meetings between European diplomatic actors with an exclusive focus on developing/updating communication strategies and coordination strategies to better synchronise outreach and boost image resilience, specifically at times of crises.</p> <ul style="list-style-type: none"> ▪ Involve communication experts to sit within the coordination group meetings of the political or economic sections. 	
<p>Undertake a mediator/broker roles between the location in focus and the</p>	<p>Hold regular and institutionalised coordination meetings between European actors/their</p>	

EU Member State(s), especially less visible ones, and in case of conflicts.

communication officers and local strategic communication experts as well as historians/sociologists/etc. to ensure sensitive grounding in local contexts.

Highlight **the added-value** that the EU adds to the efforts of the Member States and Member States add to the efforts of the EU in key areas and in third countries openly and broadly, **using multiple communication channels** (traditional and social media, advocacy by the EU Delegation staff, EU VIPs visiting and/or coming virtually, etc.)

CLIMATE, CULTURAL, RST & SPORTS DIPLOMACY

CONTEXT

The climate crisis changes how diplomacy operates

The climate crisis and the multipolarity and proliferation of actors in the climate space mean that competition and contestation are shaping the global climate governance conversation while multilateral and domestic progress have to accelerate to deliver climate change mitigation and adaptation at speed and scale. Climate and global climate governance are understood through multiple prisms including how the EU is seen to act within the multilateral process, on the international stage and how progressive it is domestically and how delivers on its ambition.

LONG TERM

The EU needs to position itself as a credible and leading domestic and international climate player

Reinforce and advance further its Climate Diplomacy, Science and Innovation Diplomacy, Education Diplomacy, Cultural Diplomacy and Sports Diplomacy drawing on the very positive perceptions across the key partner countries of European/EU Member States' culture, arts, history, sports, lifestyle, business as well as the EU Green Deal and international efforts and international leadership in fighting climate change, expertise in science and research and high reputation in education.

New to 2015 is a pronounced positive perception of the EU's role in spearheading research, science and innovation to save the environment and curb climate change as well as innovations in the medical sector observed among national experts, educated youth and leading media. While each of these themes (apart from climate) might not drive visibility, climate links to a wide range of issue areas including RST.

The public opinion surveys, interviews with national experts and focus groups with students find that the EU is seen in a positive light in climate, cultural RST and sports (including in more antagonistic/adversarial countries). Positive perceptions are also attached to the images of economic partnerships when it comes to energy policy (renewables specifically), when the EU and the key partner share but common interests.

While the awareness/knowledge of the EU actions in the cultural issue-areas is vaguer, culture and education remain influential points of attraction for and in demand of stakeholders and educated youth across the world, who highly value Europe's cultural identity and legacy. This however ties to historical experiences. Building historical and cultural ties has to be considered carefully and in acknowledgement of Europe's colonial history to build trust.


 PRACTICE/
SHORT-TERM

Build institutional and governance structures that mainstream climate change into wider organisational public diplomacy thinking	Test frameworks and pilot models for outreach activities while enhancing leadership profile	Support capacity building and funding activities in especially climate, RST and culture
<ul style="list-style-type: none"> ▪ <i>consider sharp increase in funding for exchanges between youth and experts in the issue-areas of climate, RST and culture</i> ▪ <i>engage cross-nationally, and specifically with global climate (youth and marginalised group) fora and non-state organisations and build regular and accessible structures for inclusive dialogue</i> ▪ <i>run internal EEAS/FPI workshops and seminars on best practices in these issue-areas, involving experts from non-EU like-minded partners</i> ▪ <i>streamline climate diplomacy into EEAS diplomatic training</i> ▪ <i>in these issue-areas, engage better with the local youth culture and continue to empower non-state actors (cultural actors, civil society and academia) on an even broader scale.</i> ▪ <i>design initiatives that are “blended” for these themes bringing together local stakeholders from these cohorts with youth to maximise effect, networking and post-event communication outreach. “Mix” key</i> 	<ul style="list-style-type: none"> ▪ <i>test frameworks learning from Member States. e.g. consider testing Climate Embassies and Tech Diplomacy as practices by Denmark.</i> ▪ <i>identify, map and e-archive new and innovative approaches and best practices by EU Delegations and EU Member States around the world in cultural, sports, climate and science diplomacy as well as advanced practices by other international actors</i> ▪ <i>develop a strategy on selecting and engaging social media influencers in the areas of culture, sports, climate and science diplomacy and pre-test it in a pilot – in line with the overarching EU public diplomacy goals (discussed above)</i> <p><i>develop “platform” thinking in public diplomacy outreach by reducing siloed event focus in one theme and acknowledge the overlap between themes (e.g. climate, energy, trade, research and innovation, culture).</i></p>	<ul style="list-style-type: none"> ▪ <i>examine and be mindful of the historic and cultural connotations that “European culture” or the climate conversation can bring</i> ▪ <i>support locally-sensitive initiatives of cooperation in the field of climate, RST and culture as in EU external relations international cultural relations including expanding on the eligibility of partner country institutions in Horizon calls</i> ▪ <i>enhance capacity-building initiatives by support for technical assistance, best practice sharing, coordination and knowledge exchange</i> ▪ <i>promote EU achievements and updates in the field of data management and digital transaction system, digital tax, digital security, artificial intelligence.</i> <p><i>promote EU achievements and updates in the field of medical innovation</i></p>

stakeholders in other formats that are more closed-door.

climate policy making and negotiations need to become more transparent and accessible, for example through the creation of distinct local and community support.

7.2.3. COVID AND DIGITAL DIPLOMACY

CONTEXT

COVID-19 has accelerated the speed of digital diplomacy

The COVID-19 pandemic is an unprecedented global event that has raised the degree of uncertainty and anxiety among the public and brought major changes to the practice of public diplomacy. A protracted lack of people-to-people contacts, heavy reliance on digital means, and uncertainties around when and how to emerge from the pandemic, challenge public diplomacy of the EU and highlight the importance of advanced creative tools in digital diplomacy.

The Update Study 2021 demonstrated that all EU Delegations in the 13 studied countries have developed an extended arsenal of digital means to communicate the EU and its policies and run events when personal contacts are curtailed. This is a major difference to the 2015 Report, which recommended gradual increase in digital diplomacy, then rather limited. The Update Study 2021 points that digital tools will not go away post-pandemic as they have shown a strong potential for “digital agenda-setting, digital presence-expansion and digital conversation-generating” (Bjola & Jiang, 2015, p.72). In the uncertain post-COVID world dominated by new media ecology, hybrid public diplomacy – cleverly combining face-to-face and online tools, strategies and initiatives – will lead.

LONG TERM

Image resilience in crises and through digital diplomacy

The 2015 Baseline Study registered negative impacts of multiple crises on the image of the EU: the Eurozone debt crisis, the migrant crisis and the beginning of Brexit. The 2021 Update Study finds the image of the EU to be negatively impacted by the Covid-19 pandemic in all 13 countries. This is in addition to the lingering negative imprints Brexit and the EU’s handling of the migration crisis have left on the external perceptions of the EU, specifically among educated youth – future leaders and influencers. In 2021, the EU’s handling of the COVID -19 pandemic has been framed most critically in local media and among university youth. External observers register in their perceptions the negative impact of Covid on the EU’s economy and share negative reflections on the EU’s handling of the pandemic in the EU as well as on its rigid vaccination export regime globally. However, the EU’s resilience in overcoming the Eurozone debt crisis, Brexit and the pandemic’s effects are also noted by the national experts and agenda-setting media.

Build on the positive perception of the ‘resilient EU’ – and specifically among educated youth and local opinion-formers. Counterbalance the emerging negative perceptions of the EU affected by the COVID pandemic in a timely manner. Digital diplomacy means are critical in this regard. Build on benefits of digital diplomacy such as strengthening relationships, proximity with audience, speed, effectiveness and low cost. Address risks of digital diplomacy linked to mis- and dis-information flows as well as cybersecurity.

Continue to use digital tools to reach out to audiences beyond existing “bubbles” of those who are friendly towards, interested in and informed about the EU and engage with a range of audience in dialogue. Balance using social media for *monologue/projection* with *engaged, respectful, culturally-sensitive empathetic dialogue*. Boost the *collaboration* element by involving local experts into the co-design of the digital diplomacy platforms and campaigns.

PRACTICE/
SHORT-TERM



Develop common strategic communication/public diplomacy toolkits and MAP THE best practices for in-person, hybrid and modes learning lessons from the pandemic period – in EU Delegations, institutions and member states

Map, assess and archive the most successful e-diplomacy tools, events and actions among EU Delegations and EU Member States embassies to third countries:

- Create and maintain a *centralised, regularly updated e-depository of the best e-practices* by EU Delegations and EU Member States' embassies
- Map the *best practices of fully online events as well as hybrid events.*
- Share *regular concise updates with each other* – e.g. regional news update on 5 best e-public diplomacy practices from each EU Delegation every quarter

Embody digital diplomacy and include digital diplomacy tools and trainings in EU institutional traineeships

Further embrace the use of online/social media to engage with different stakeholders in civil society, media and youth, as well as the general public.

- continue to use online tools *to educate viewers about the EU*, its structure, governance, aims and most recent developments, as well as achievements in key areas, with more attention to culture, climate, education, RST. External general audiences appreciate this information at times when international travel/tourism/exchanges are limited
- *Adjust e-tools for each type of the key audience accordingly.*
 - key audiences in the political, business and civil society sectors showed preference to face-to-face modes of interaction, when possible.
 - key stakeholders in policy- and decision-making positions and in older demographic brackets continue to appreciate receiving the updates about the EU/ EU Delegation newsletters by email.

Resume exchange diplomacy in flexible location-specific modes

When lockdowns are over, consider short-term boosts in face-to-face exchanges, to compensate for curtailed people-to-people interactions.

- develop *flexible tactical approaches* factoring limitations to long-term planning on the ground due to the pandemic
- remain *strategic with choices/priorities of the target audiences for exchanges*

	<ul style="list-style-type: none"> ○ young people prefer more interactive platforms and entertaining formats. ○ Civil society appreciates an opportunity for discussion and influence presented by “side-line” events, and e-tools could be used to facilitate such interactions. 	
<p>Map, assess, and archive the most successful e-diplomacy tools, events and actions among third countries and international organisations and specifically those that emerged at times of COVID.</p> <ul style="list-style-type: none"> ▪ <i>undertake local mapping, results reported to the HQ.</i> ▪ <i>store and share information with EU Delegations through the centrally-run, regularly updated e-depository</i> 	<p>Continue to devise new e-tools and evaluate their effectiveness</p> <ul style="list-style-type: none"> ▪ <i>conduct regular social media analytics of all EU Delegation channels</i> to understand the audiences and patterns of engagement and reception as well as preclude the spread of mis- and disinformation ▪ <i>devise e-toolkits for the full and partial lockdown situations</i> when diplomatic interaction with stakeholders on the ground is severely limited and e-means become the main channel for communication with local key groups and diplomatic actors. ▪ <i>conduct a formal evaluation of the cost-effectiveness of the e-tools</i> before, during and post- COVID. ▪ <i>run pilots of the new e-tools</i> and evaluate their effectiveness through analytics in a given location before launching it on a full scale. 	<p>Consider sharp increase in support for exchanges post-COVID:</p> <ul style="list-style-type: none"> ▪ <i>devise new schemes of exchanges</i> between key experts, academics, think tanks, NGOs, media, business leaders, tertiary and secondary teachers in the key issue-areas for the EU to compensate for long periods of isolation ▪ <i>strategically involve into exchanges</i> those who have <i>high interest/high influence</i> as well as those to have <i>high influence/low interest</i>. These are location-specific decisions: composition of interested and influential stakeholders will be difference in each key partner. ▪ <i>reinforce a key requirement for each beneficiary to publicise their experiences, on various digital platforms</i> on their discoveries in Europe/ the EU upon their return.
<p>Discuss and share the best e-practices and challenges accompanying digital diplomacy on a regular basis in the dedicated formats</p>	<p>Maintain, improve and share expertise of EU staff through training and exchange:</p>	<p>Resume exchange contacts especially among younger audiences (university and early career levels).</p>

- **at the coordination meetings in each location, and especially the meetings on strategic communication exclusively**
- **at the annual Ambassadors' meetings in Brussels**

- conduct *regular specialised country-specific trainings at each EU Delegation* to learn new cutting-edge practices
- apply new tools *factoring local peculiarities of information flows in local political and media environments*, as well as changing location-specific trends in the use of social media.
- *invite local experts* to assist with these trainings
- conduct *annual dedicated meetings on the direction of the cutting-edge digital diplomacy practices* to tap into the latest achievements in the technological progress cycles and to provide foresight for the digital communication.
- engage with *world leading technology experts and academics in the respective fields*.
- send *regular participants, presenters and panels to the international conferences dedicated to public diplomacy and digital diplomacy* where the leading experts on the subject area concentrate and can provide feedback to EU public diplomacy practice.

- Young people, one of the most important key audience group for the EU, are the most under-exposed to Europe/the EU due to the lack of travel and personal contacts with Europeans in their formative years.

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